



CHURCH LEGACY
A lasting gift to your church

Legacies: A Significant Opportunity

Legacy Strategic
Framework
2019 – 2023

 THE CHURCH
OF ENGLAND

www.churchlegacy.org.uk

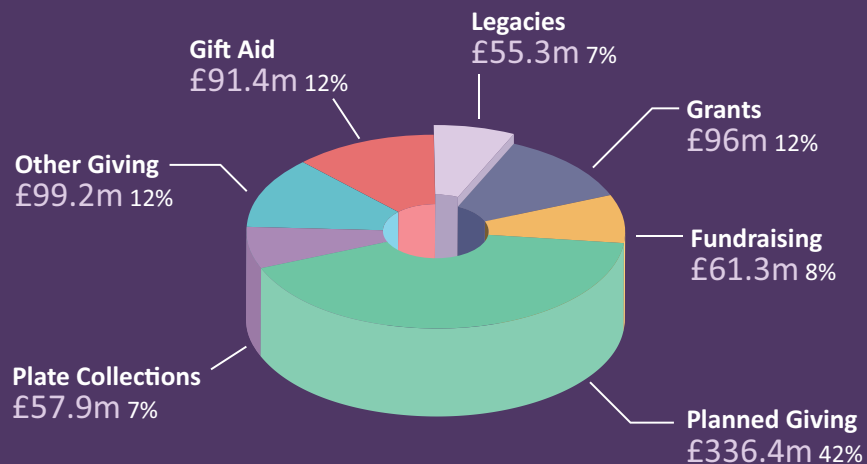
Introduction

Legacies are a vital source of income to the Charity Sector and to the Church of England.

In 2017, UK legacy giving was worth a total of £2.8 billion representing 14% of the fundraised income received by UK charities.

In 2016, Church of England PCC legacy giving was worth a total of £55.3 million representing 7% of total PCC voluntary income. Over 4,000 legacies are received each year, with 1 in every 4 churches benefiting from a legacy.

However, the Church of England legacy income accounts for just 1.7% of the UK legacy market in value terms and 3.2% in numbers terms. In both value and number terms, our market share has been falling over the past 7 years.



A Significant Opportunity

The opportunity to grow legacy income for the Church is potentially significant. This is mainly due to our church members age demographic, levels of prosperity and strategic advantages over our charity competitors.

However, this is a time limited opportunity. The baby boomer generation (those born between 1946 and 1964) are considerably more affluent than previous generations and the generations to come. They represent the key audience for legacy fundraisers due to their potential impact on legacy incomes over the next three decades.

The window of opportunity to grow legacy income will disappear in less than 30 years' time and it is this sense of urgency that is driving an increasingly competitive sector.

Call to Action

We must address this limited 'window of opportunity' now, to ensure we maximise the promotion and adoption of legacy income over the next three decades.

If we do nothing, we will inevitably experience a sharp decline in legacy income; legacy income which is needed for mission, for ministry and for the future of our Church.

National Legacy Campaign

Over the past seven years, the Church of England has experienced an average of 2.9% year on year increase in legacy income (-0.2% in real terms). The number of legacies received has remained relatively static, whilst the number of Total UK Deaths has been increasing.

In 2012 the National Legacy Campaign was launched to grow the number and size of legacies across the Church of England - making national support, guidance, literature and training available to Dioceses, PCCs and Supporters.

Parish legacy income is often varied and can fluctuate significantly, nevertheless where Dioceses promote legacy giving as part of Christian Giving, real term growth is clearly visible.



CASE STUDY Diocese of Chichester

Chichester Diocese has continually engaged in legacy marketing campaigns since 2006. As a result, they have seen the largest value of legacy income and the greatest number of legacies of any Diocese over the past 7 years. Whilst it can be argued that Chichester Diocese has high property values and retirement communities, these strategic advantages alone cannot achieve such levels of growth.

“ As a Diocese we recognise we must continue to promote legacies if we wish to see such levels of growth continue.”

John Kemp, Parish Advisor



CASE STUDY Diocese of Guildford

Guildford Diocese has been actively promoting legacy giving since 2010 and has worked closely with the National Legacy Officer.

As a result of their hard work, they have witnessed significant increases in the size and number of legacies received over the past seven years, generating over £8.8 million in legacy income. Impressively the change between YOY income is an average of 61% in legacy income and 19% in the number of new legacies received.

Strategic Development Plan 2019 – 2023

Although legacy income is a lifeline for many parishes, there is often a lack of urgency when it comes to prioritising and encouraging legacies. However, the next generations who will give the legacy gifts of the future, are making their wills now.

Our new Legacy Strategic Development Plan 2019 – 2023 provides a robust strategic framework to deliver the aims and objectives required to sustain current levels of growth and identify new areas of potential growth.

Providing support, materials and training is still very much needed and a huge incentive for PCCs to encourage legacies in the first place. Whilst the practice will continue, the approach will change, enabling us to become more targeted and focused.



CASE STUDY Diocese of Norwich

“ An important part of our mission here in the Diocese of Norwich is to help parishes with their mission and ministry.

Working closely with the Bishop of Norwich, and his senior staff team, we have devised a 5-year legacy marketing campaign to increase the size and number of legacies left to our churches, in the belief that they will raise the vital funds needed for parishes to continue to grow spiritually and numerically.”

Robert Culyer, Parish Funding Support Officer

“ As Diocesan Secretary of Norwich I can see the huge potential legacies offer to our churches – both financial and missional growth. I am delighted to support the Diocesan Legacy Campaign and would encourage other Dioceses to consider how they too can encourage this often overlooked but incredibly valuable area of giving.

By encouraging legacies in the Diocese now, I am helping secure the future of the Diocese and in years to come, the benefits of our Legacy Campaign will bear witness. This is the legacy which I leave to my Diocese.”

Richard Butler, Diocesan Secretary



Our Focus

Parish Focused

At the heart of our strategy is the promotion and encouragement for legacies to be received at a parochial level. This is where the relationship with the supporter is, and where their legacy will have the greatest impact on mission and ministry in the community.

Generous Giving

Our generosity is a response to God's abundant grace and is demonstrated through our lives and the lives we share with others.

Leaving a legacy is just another way to give, thanking God for all the blessings received during a lifetime.

For Future Generations

By remembering the Church with a legacy, individuals can help the Church grow its Christian Ministry to meet the needs of future generations. Legacies will help secure the future of our Church, for generations to come.



Our Approach

An Ethical Approach

In legacy fundraising it is essential to be aware of the incredibly sensitive issues involved: often large amounts of money in wills, bereaved families, potentially vulnerable audiences and the connection with death.

To ensure that the Church of England as a collective is conducting its legacy fundraising in a way that is legal and ethical, we have committed to The Institute of Legacy Managements (ILM) Ethical Framework for the Charity Sector. We commit to fulfilling our donors' final wishes with: sensitivity, transparency, integrity, collaboration and keeping loved ones Informed.

Our Strategic Advantages

We have a number of strategic advantages when it comes to growing our legacy income.

Church Member Age Demographic

The total Worshipping Community of churches across the Church of England in 2016 was 1,139,000 people, of whom 31% were aged 70 or over.¹ Of the Adult Worshipping Community leavers in churches across the Church of England in 2016 (47,700) 43% were due to death or illness.² And yet, the number of legacies the Church of England receives is from only 0.8% of people who die in the UK each year.

Church Member Levels of Prosperity

Modelling wealth using 'Mosaic' data (whereby postcodes are allocated into 20 bands) indicates the basis of the overall wealth of church member households is substantial. The over-represented types tend to be Category A Country Living (Wealthy Landowners, Village Retirement) and Category B Prestige Positions (Bank of Mum and Dad, Alpha Families, Premium Fortunes and Diamond Days).³

¹ Statistics for Mission 2016, Church of England Research and Statistics, London 2017

² Statistics for Mission 2016, Church of England Research and Statistics, London 2017

³ Mosaic Consumer Classification, Experian Marketing Services, 2017



Advantages over our Charity Competitors

If we look at the four key areas of a successful legacy strategy, the Church of England has a very strong fundraising case for support.

- 1 Understanding your audience**
We have a Christian presence in every community, nurturing and exploring personal faith through regular interaction.
- 2 Personalise your message**
Every parish church has its own mission and vision, to meet the needs of its own community.
- 3 Engage a person's significant life experiences**
The church is personally involved in life's most significant experiences, placing us at the heart of these memories and conversations.
- 4 Offer an element of symbolic immortality**
We believe in the life and resurrection of Jesus Christ and our symbol of immortality is the cross. We bring a message of hope.

Our Objectives

The Six Strategic Pillars represent our key objectives from 2019 – 2023. Our strategy is still ambitious, and will focus on diocesan engagement, parish promotion and developing supporter insight.

Six Strategic Pillars

- 1 Increase the total income and number of legacies left to the Church of England.
- 2 Raise the profile of legacy giving and will writing across the Church of England.
- 3 Inspire & prompt supporters to leave a gift in their will.
- 4 Provide national resources and training across the Church of England.
- 5 Grow the level of support and engagement with existing and new senior leadership.
- 6 Work with professional advisors & support groups to drive new campaigns & partnerships.



Key Implementation

Support Diocesan Senior Leadership

- Promote Legacy Campaign at Senior Management Meetings.
- Produce bespoke Diocesan Legacy Reports and Forecasts.

Support Diocesan Giving Advisors

- Create bespoke Diocesan Activity Plans.
- Promote a National Legacy Day to raise awareness of legacies.

Engage with Deaneries and Parishes

- 50% of PCCs to have a Legacy Policy in place by 2023.
- Identify local ambassadors to promote legacy giving.

Engage with our Supporters

- Vary communication methods to engage a wider audience.
- Increase the level of personal testimony around legacies.

Build Partnerships

- Explore and establish promotional partnerships.
- Grow internal expertise by building external relationships.

Long Term Growth Targets

Based on the percentage of church members aged over 70, the percentage of leavers within a church due to death, and the levels of prosperity within our churches, our strategic positioning marks legacies as an opportunity for income growth. It is therefore not unrealistic to increase the size of gift and number of gifts received across the Church of England.

However, resource and levels of investment are limited, the economy uncertain and legacies are an increasingly competitive market. As a result, momentous increases are unlikely and long-term growth targets need to reflect this.

This strategy's Income Target is to reach £85m by 2025.

Forecasting of Growth Targets

Increase Over 4 Years

As a % of total PCC Vol Income	1%
Number of Residuary Legacies Received	4%

Increase Year on Year

Total Legacy Income	5%
Number of Legacies Received	2%
Average Size of Legacy Received	3%

Conclusion

If Parishes and Dioceses wish to see continued levels of legacy income, they must invest in this important area of giving now, before it is too late.

By committing to a strategic framework which encourages investment and the integration of legacies within Diocesan Giving Strategies, we can promote and implement practice that enables real term growth.

By demonstrating that our churches deserve and need legacies, we can invest in mission, ministry and the future of our Church.



Next Steps

The National Legacy Officer works with Diocesan Giving Advisors and PCC members to engage and equip parish volunteers to have the confidence and resources to encourage legacies.

To discuss how your Diocese can achieve real term growth in legacy giving, please use the contact details overleaf.

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