



# 10 Things I've Learned in 35 Years About Looking After My Legacy Donors

AQDFP Conference

May 26, 2017

David Love, Caretaker, Legacy Donors, WWF-Canada

# **1. Do Your Homework**



- Fraser Green, [www.goodworksco.ca/what-we-do/legacy](http://www.goodworksco.ca/what-we-do/legacy)
- Russell James, [www.encouragegenerosity.com/](http://www.encouragegenerosity.com/)
- Claire Routley, [www.legacyfundraising.co.uk/](http://www.legacyfundraising.co.uk/)
- Richard Radcliffe, [www.radcliffeconsulting.org/](http://www.radcliffeconsulting.org/)
- Recent articles by Mena Gainpaulsingh (10 Donor Stewardship Rules)

## **2. Know Who They Are & What the Journey Is**



**LEGACY RESULTS TRACKING SHEET**

**Prior Two Year Results**

			<b><u>2014/15</u></b>			<b><u>2015/16</u></b>			
		Target	Actual	Variance			Target	Actual	Variance
<b>DONORS</b>					<b>DONORS</b>				
	<b>donors</b>	50	66	16		<b>donors</b>	100	102	2
	<b>prospects</b>	100	84	-16		<b>prospects</b>	200	203	3
<b>DOLLARS</b>		\$ 2,100,000	\$ 2,447,930	\$ 347,930	<b>DOLLARS</b>		\$ 2,300,000	\$ 1,418,553	\$ (881,447)

**End of March (9 months into fiscal)**

						<b><u>2016/17</u></b>				
		<b>Month</b>			<b>Year to Date</b>			<b>Year</b>		
<b>DONORS</b>		Target for Month	Actual for Month	Variance	Target for Year to Date	Actual for Year to Date	Variance	Target for Year	Actual for Year	Variance
	<b>donors</b>	13	7	-6	117	119	2	150	119	-31
	<b>prospects</b>	17	0	-17	153	189	36	200	189	-11
	<b>suspects</b>	17	0	-17	153	723	570	200	723	523
<b>DOLLARS</b>		Target for Month	Actual for Month	Variance	Target for Year to Date	Actual for Year to Date	Variance	Target for Year	Actual for Year	Variance
		\$ 175,000	\$ 16,818	\$ (158,182)	\$ 1,575,000	\$ 1,265,150	\$ (309,850)	\$ 2,100,000	\$ 1,265,150	\$ (834,850)

	<b><u>30-Jun-16</u></b>	<b><u>30-Mar-17</u></b>
PG Donors	<b>1,417</b>	<b>1,536</b>
PG Prospects	<b>1,214</b>	<b>1,403</b>
PG Suspects	<b>N/A</b>	<b>723</b>

Open Estates:	
- Notified of Bequest	31
- Partially Realized	25
	<hr/> 56
Contingent Estates:	19
Total Open Estates	<hr/> <hr/> 75

New estates in FY 17	<b>23</b>	<b>Bateman Prints to Send = 12</b>
Closed estates in FY 17	<b>27</b>	
New estates in March	<b>3</b>	

# Memo

**Date:** 6/29/2016  
**To:** David Love, Sarah Zachariah  
**CC:** Monte Hummel  
**From:** Chantelle Uribe  
**RE:** Closed Estates Donor Analysis

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## **Total Estates: 380**

### **Money**

These people left about \$30,000,000 to wildlife conservation. (Average = \$79,000)

### **Gender**

Male: 94 (25%)  
Female: 286 (75%)

### **By Province**

Ontario: 213 (56%)  
British Columbia: 80 (21%)  
Other (23%)

### **Donor History**

249 were donors (66%)  
131 were non-donors (34%)

### **Breakdown of 249 Donors**

51 (20%) told us we were in their Will  
198 (80%) did not tell us

170 (68%) were single gift donors  
79 (32%) were monthly donors

207 (83%) gave less than \$5,000 in their lifetime  
119 (48%) gave less than \$1,000 in their lifetime

48 donors told us we were in their Will but died without leaving a gift



### **3. Do As Much Face to Face As Possible**





Norma Cameron



## **4. Connect With Their Values**







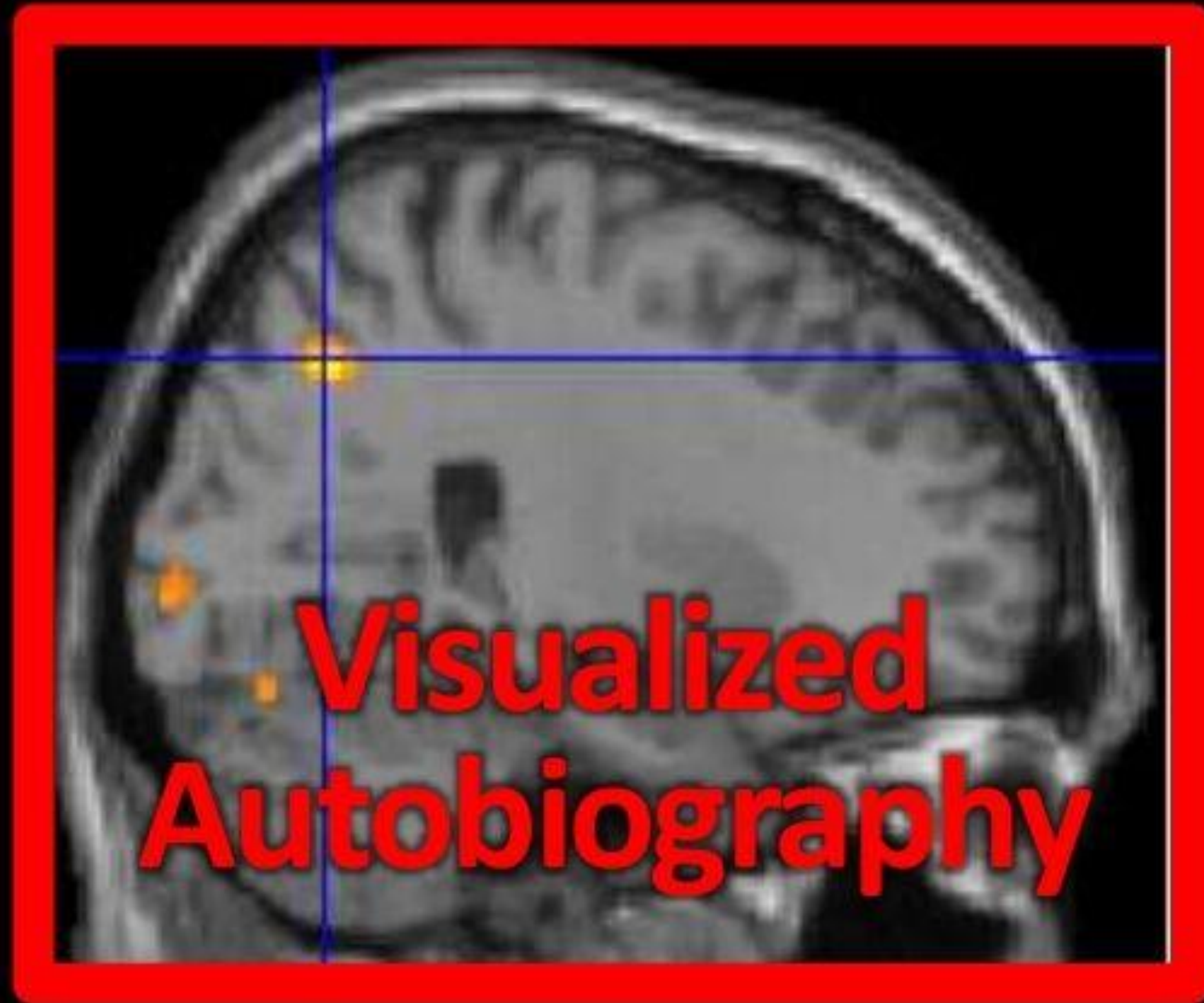




## **5. Trigger Their Memories**



# Research



Bequest decision-making emphasizes  
“visualized autobiography” brain regions



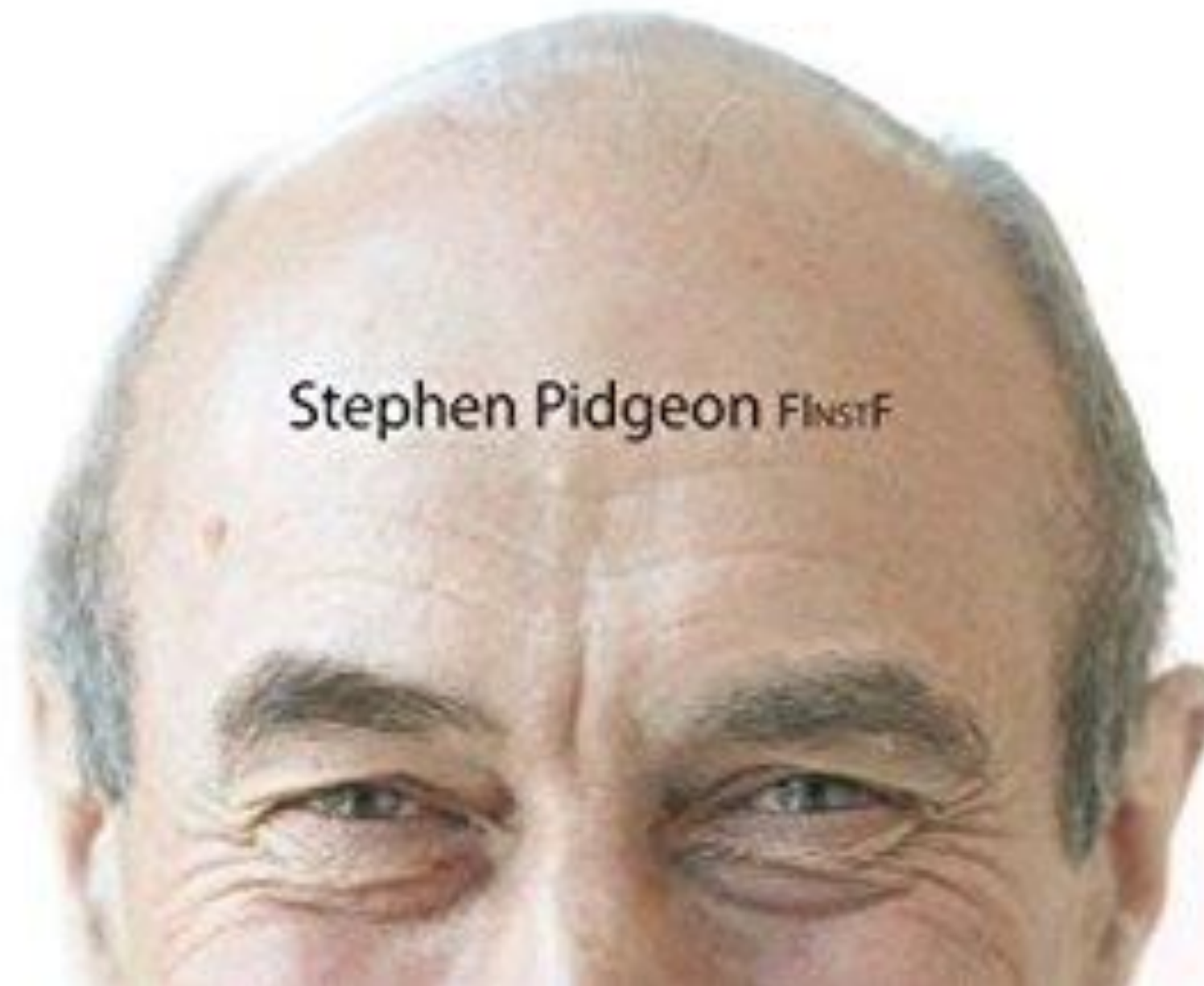
## **6. Make Their Journey Passionate, Relevant and Varied**



"As irreverent and incisive as the man himself."

HOW TO  
**LOVE**  
YOUR DONORS  
(TO DEATH)

Stephen Pidgeon FIrstF





## **7. Sprinkle “Legacy Dust” Everywhere**



## **8. Invite Them to Talk with a Person, Not an Organization**



# Legacy Giving in Canada



**Your legacy ensures  
that hope endures**

If you would like to discuss leaving a legacy gift to UNICEF Canada, please contact our Legacy Manager, Jackie Jones: 1-866-264-0333 or at [jjones@unicef.ca](mailto:jjones@unicef.ca)

Please send me UNICEF Canada's free Legacy Giving Brochure

## TALK TO US



David Love is available to speak to you anytime. Get in touch with him by phone or email to learn more about leaving a Legacy gift, or if you are an Executor or Lawyer managing an Estate.

Contact David directly at 416-489-4567 ext 7242 or by email: [dlove@wwfcanada.org](mailto:dlove@wwfcanada.org).



# **9. Demonstrate Impact**



## Future conservation opportunities

WWF-Canada is committed to building a future where nature and people thrive

Recognizing Canada's bounty of nature and species, we are committed to:

- A healthy future for the Arctic;
- All freshwater systems in good condition by 2025;
- Healthy marine wildlife on all three coasts;
- Resilient communities co-existing with healthy ecosystems across the country.



IMAGINE ... Clean fresh water everywhere



IMAGINE ... Children immersed in nature

Three eager youngsters take part in a WWF project looking at the water quality of a river in southwestern Ontario.

IMAGINE ... A pristine Arctic

Over the next 20 years, WWF-Canada will demonstrate the possible for both nature and people.



Since 1991, our Legacy Circle has grown from two members to over 1,450. Our goal is to have 2,000 by 2020

### WWF-Canada Legacy Circle



We deeply appreciate your decision to leave a legacy gift to wildlife through WWF-Canada. We encourage you to share this report with your family and friends.



accredited by Imagine Canada for excellence in nonprofit accountability, transparency and governance



WWF-Canada, 245 Eglinton Avenue East, Suite 410, Toronto, Ontario M4P 3J1  
 Tel: (416) 489-8800 Toll-free: 1-800-26-PANDA (1-800-267-2632)  
 Email: [plannedgiving@wwfcanada.org](mailto:plannedgiving@wwfcanada.org) [wwf.ca/legacy](http://wwf.ca/legacy)

Charitable # 11930-4954-RR0001



# Gifts in Wills protect nature





# **10. Build Trust, Confidence and Accountability**



### **Trust**

- a belief in the reliability, truth or ability of your charity

### **Confidence**

- the feeling or belief that one can have faith in or rely on your charity

### **Accountability**

- tell the truth – prove you are good financially and in terms of impact and faith naturally follows

### **Trust and confidence in your charity is driven by**

- Joy, which is triggered by passionate, heart-felt messages
- Satisfaction on how well your charity spends its money

**Your donor's head and heart need to work together**