



Development  
Trusts Association  
Scotland

A Thriving Community-led Network

# Workshop 10: Philanthropic and Legacy Giving for Development Trusts



Community  
Shares  
Scotland



# Workshop Plan

## **Introduction**

- Context and relevance to DTAS network
- Parameters
- Statistics

## **Building a Plan**

- A fundraising journey
- Understanding donors
- A case for support
- Role of Trustees
- Must know tips

## **Collective Brainstorm**

- Next steps for DTAS
- Network support needs
- Opportunities and barriers





# Introduction

## **Context of DTAS' Democratic Finance Programme**

- What are the local sources of wealth?
- How can DTs assess this money?
- How can we move away from grant and loan dependency?
- Untapped opportunity for our network?
- What further support could DTAS provide?

## **Parameters**

- Local givers - people and orgs
- One off, recurring or legacy gift
- Target givers - not just celebs and HNWs
- £10k - £100k ?
- Flexible money, DT in control
- Not the Foundation Scotland approach



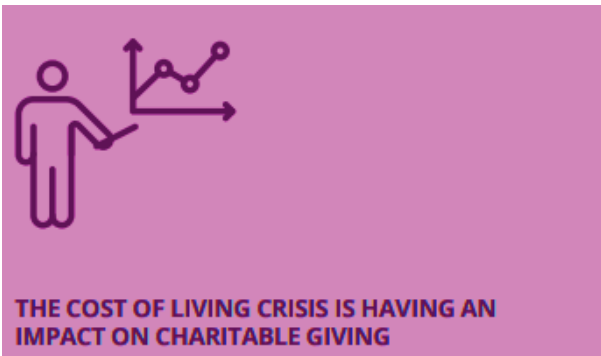


# Philanthropic Giving Stats



£12.7bn

Total amount given to charity  
over the course of 2022  
(up £2 billion on previous year)



24% of people reported they had (or planned to  
make) changes to their giving behaviour



Pre pandemic giving - 65%

Post pandemic giving - 59%

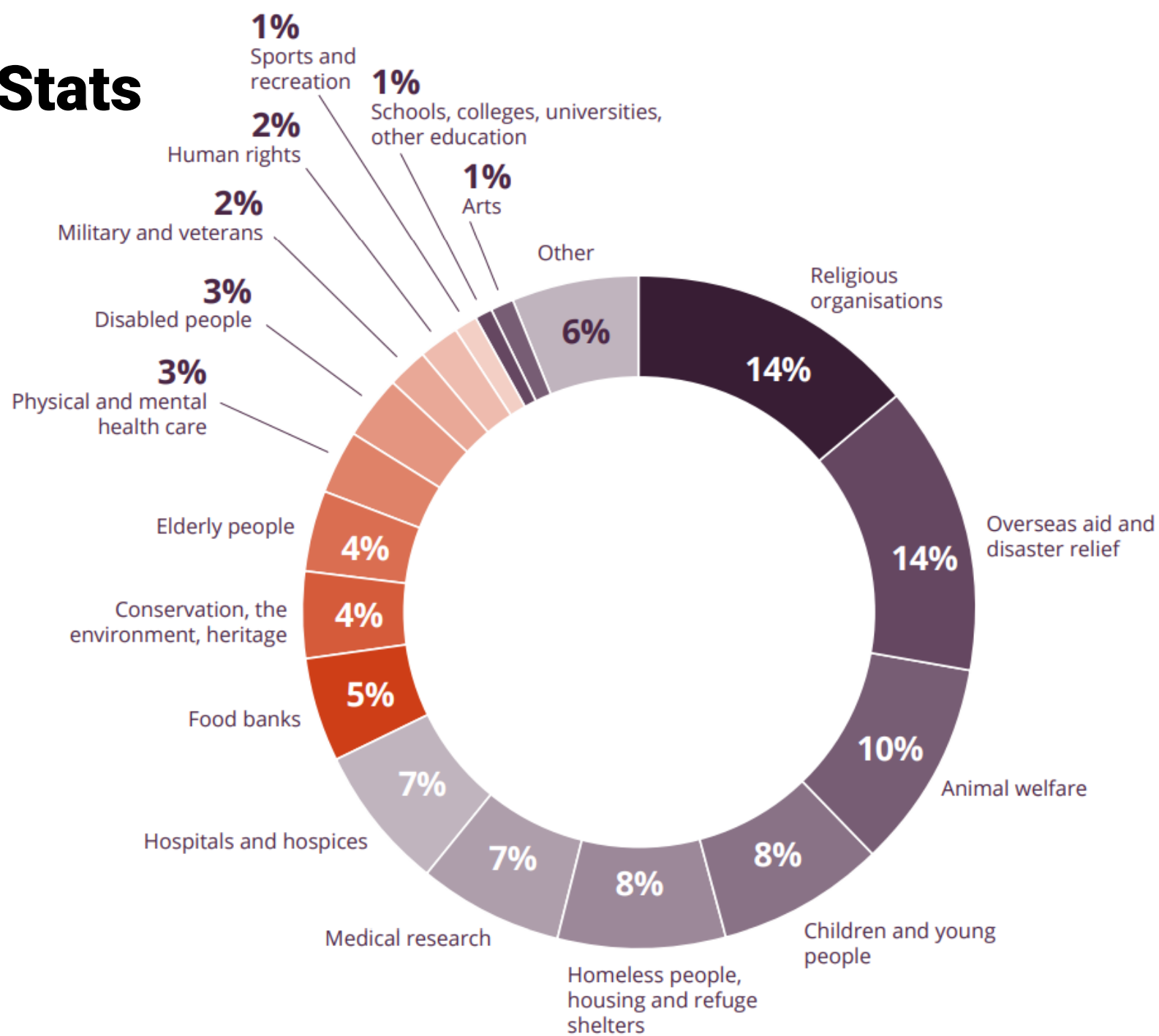
Woman and older people more likely to give

58% (Women) vs. 49% (Men)

69% (65+) vs. 42% (16-24)



# Giving Stats





# Legacy Giving Stats

## **£90 million a year given to Scottish charities in legacy gifts**

- each week, 47 people in Scotland leave a gift to charity in their Will.

## **Legacy income to Scottish charities growing at 7% per year**

- Compared to 4.6% growth rate for charities in England and Wales

## **Around 500 Scottish charities benefit from legacy giving**

- 64% are small or community based charities
- but 50/500 charities receiving 70% of the income

## **UK wide, Scottish people indicate they are most receptive to legacy gifting**

- 42% of people in Scotland aged 40+ saying they would be happy to give in this way
- Only 6% of people actually do
- And in reality legacy gifts are less prevalent in Scotland than other parts of the UK

## **Money and enthusiasm to give is clearly there – how do DTs better access it?**

*'We need to have more of a culture in Scotland of sharing the wonderful stories of what legacies can achieve. A gift in a Will is not about death, it's about life – people's values, their aspirations, the things they want to carry on once they are gone.'* Head of Fundraising Age Scotland



# DTAS Annual Survey Stats

**174 survey responses, out of 350 members**

- 50% response rate

**37 Development Trusts indicated they had used philanthropic giving**

- 21% of responders

**21 Development Trusts indicated they have used legacy giving**

- 12% of responders



# Planning your fundraising

## Where are you now?

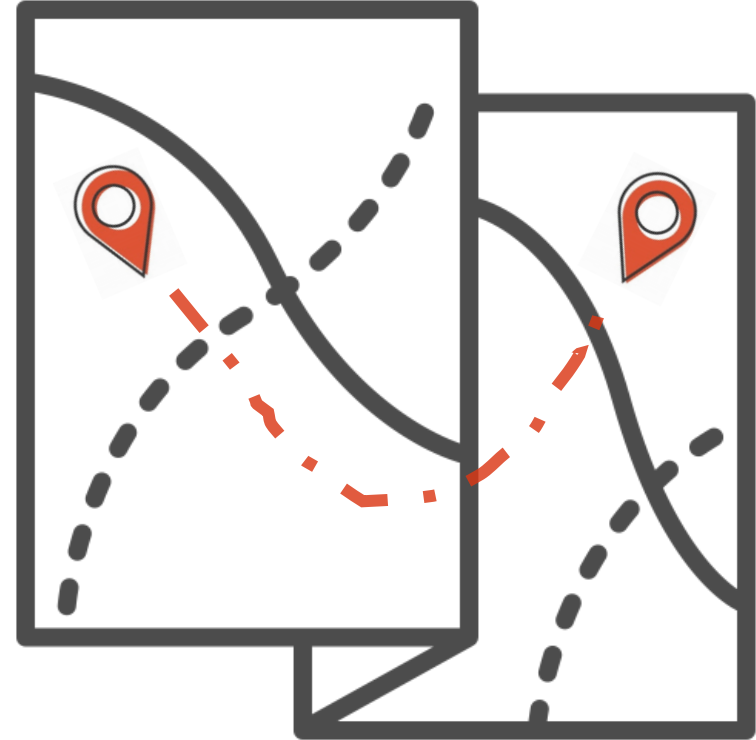
- What is the overall purpose of your organisation?
- What are your immediate objectives?
- Fundraising audit
- SWOT analysis

## Where do you want to be?

- What is the funding need?
- What might be achievable?
- Setting fundraising objectives

## How will you get there?

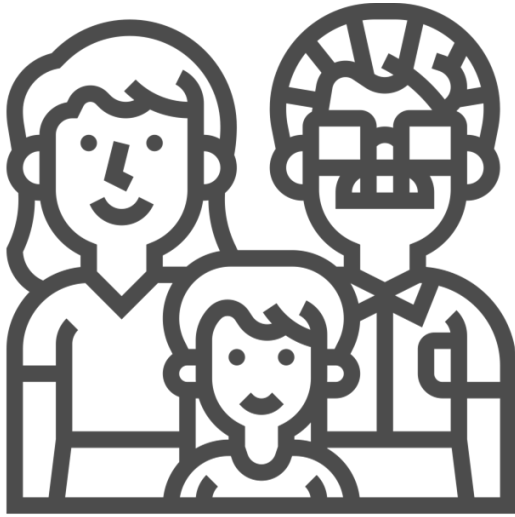
- Key strategies
- Tactical plans
- Budget, resources and timeframes
- Reviewing your progress







# Understanding your donors



Who might give?



Why might they give?



How might they give?





# How are other organisations fundraising?

- Ad hoc / one-off donations
- Regular giving
  - Direct debit gifts
  - 'Friends of \_\_\_\_\_' schemes
  - Sponsor a room/activity/asset schemes
- Events
- Legacy giving
  - Pecuniary bequests
  - Specific bequests
  - Residuary bequests
- In memoriam giving
- Major donors
- Company giving
  - Sponsorship
  - Matched giving
  - In-kind support



See [Beyond the Usual Suspects](https://www.dfascommunityownership.org.uk) resource for further information and tips





# Building your 'case for support'

A '**case for support**' is used to guide your fundraising communications

It should clearly summarise:

- What you do
- What makes you best to do it
- How funding will help you achieve your goals

The case for support is a **marketing tool**. It should:

- Use powerful and emotive language
- Evidence your impact
- Have a clear purpose and call to action
- Adapt to different audiences

There are [guides](#) available online to help you craft a compelling case for support





# Consider the Four Pillars

One aid for writing powerful fundraising communications is to build your story on 'Four Pillars':

- Vision
- Enemy
- Hero
- Recipient

## Example – The RNLI

VISION	ENEMY	HERO	RECIPIENT
No deaths at sea	The cruel sea	Strong, brave crew	Unfortunate or careless sailors





Lifeboats



THEY'RE **GIVING EVERYTHING**  
THEY'VE GOT IN THIS CRISIS

WILL YOU **GIVE WHAT YOU CAN?**



# Consider the Four Pillars

## Example – Bonnieburn Community Trust

VISION	ENEMY	HERO	RECIPIENT
A greener, healthier, happier Bonnieburn	The rural deficit of services and amenities	Co-ordinated local people who care passionately about their community	Everybody who calls Bonnieburn their home





# The role of trustees

- Does your approach to fundraising fit with overall values and strategy?
- Do you have appropriate policies in place?
- Do staff/volunteers have the skills and resources they need?
- Do you have personal networks to utilise?

More info: [Trustees and Fundraising in Scotland – A Practical Handbook](#)





## Must-know tips

- Use **clear and consistent** messaging
  - **Personalise communications** whenever you can and remember to **say thank you!**
  - Consider the **donor experience** – make it as easy as possible to give
  - Build your network – established contacts are more likely to give
  - Consider **regulation** and follow the [Code of Practice](#)
  - Check if you can claim [Gift Aid](#)
  - Don't ask too much of donors or exert [undue pressure](#) to give
  - Fundraising is hard work – **there might not be quick results!**
- 
- **DTAS is here to help!**







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