

# Local Legacy Giving

An Untapped Opportunity  
for Development Trusts?



Democratic Finance Scotland team  
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**DEMOCRATIC  
FINANCE  
SCOTLAND**  
Transforming community wealth



# Democratic Finance Team



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Specialism in good governance and Development Trust approach

# Democratic Finance Scotland

A programme, delivered by DTAS, for **community-led organisations**.  
To support alternative methods of raising finance and funding.  
Particularly money that is locally sourced.

Ensuring communities have the  
**financial control** and the **democratic power**  
to take **ownership of important community assets**  
and run **democratic community led businesses**

# Legacy Giving in Scotland

## **£90million given to charities in legacies every year**

- Each week, 47 people in Scotland leave a gift to a charity in their will
- Legacy income to Scottish charities is 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 every year**

- 63% are small or community based
- But 50/500 (10%) charities receive 70% of the income

Source: [rac scottish-legacy-market-report-2023 aw digital singlepages.pdf](#)

# Legacy Giving in Scotland

## Scottish people indicate they are receptive to legacy giving

- 42% say they would be happy to give in this way\*
- In reality, only 6% actually do

## Very few Development Trusts have used legacy giving

- Only 21 DTs in recent DTAS annual survey (12% of responders)

\*Percentage of Scottish people aged 40+

# The money and enthusiasm are clearly there! How do DTs tap into 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

# Our legacy giving pilot

## Aims of the pilot

- Increased confidence and knowledge on legacy giving for DTs
- Increased legacy income for DTs
- Upskilled DTAS staff on legacy giving for DTs
- Better DTAS resources and support offer on legacy giving
- Knowledge and use of WeWill platform to increase legacy income

## How the pilot is working

- 10 selected pilot DTs with resource and capacity
- Workshops with experts on legacy giving
- Hands-on support to develop legacy campaign materials
- £500 microgrant to support with campaign resources
- Partnership with WeWill (up to 10 free wills – funded by DTAS/DTs)

# Thoughts from our participants

*Experience to date  
been down to luck  
– not being  
proactive.*

*Interested in how to tap into  
wider interest in their work on  
long-term projects e.g. nature  
restoration or heritage.*

*How to build on the  
success of a community  
share offer with over 400  
investor members.*

*Thinking about managing  
perceived sensitivities  
around the topic.*

*Integration into  
new website  
development and  
wider fundraising  
strategy.*

*Communicating  
impact – DTs have  
a different story to  
the big national  
charities.*





**What's the motivation?**

# **Understanding Legacy Giving**

**1) Types of Gifts in Wills**

**2) Policies and Procedures**

**3) Practicalities**

# 1) Types of gifts in wills

Fixed cash sum: pecuniary gift

*Average is £4,000*

% of estate: residuary gift

*Average is £53,900*

Specific gift or asset

*e.g. house or building*

## 2) Policies and procedures

- Important to have clear policies and procedures for the legacy management process.
- Need a solid paper trail, keeping track of decision and actions for auditors.
- DTAS are developing template policies and procedures for DTs to simplify the process.
- Trustees have a legal responsibility to deal with legacies, but can delegate that to a dedicated 'legacy officer' staff member or outsource to a professional.

### 3) Practicalities

- Not just thanking and banking!
- Can range from simple gift to complex process depending on nature of the gift, tax implications if charity etc.
- Need to be aware of PR and reputational risk of mismanagement (or perceived) of legacies
- You can find legacy professionals and guidance for internal legacy officers at the Institute of Legacy Management  
<https://legacymanagement.org.uk/>

# **Promoting Legacy Giving**

- 1) Campaign Audience**
- 2) Communication Methods and Content**
- 3) Cranhill DT example**
- 4) Top Tips**

# Campaign Audience

## Who might leave a gift

- Individuals over 55+
- Women more likely than men
- Single – not married/divorced
- No direct heirs
- Philanthropically minded individuals who support various charities
- Those with a personal connection to the cause

## Messengers

- Solicitors, family, friends, DT staff/volunteers/board

# Communication Methods and Content

**WHY?** Lead with emotion, impactful images and the story of the difference you can make, and how you can be remembered.

**WITH?** Website, YouTube, social media, leaflets, word of mouth

**WHAT?** What is the ask? What can a legacy gift look like?

**HOW?** How to leave a gift, make a will/amend a will etc, FAQs



## Leave A Gift In Your Will

### Help Build a Stronger Community for Future Generations

By leaving a gift in your Will, you can be part of our story. Your generosity will support for generations to come; creating a thriving & resilient Cranhill

Cranhill Development Trust has been at the heart of our community since 2002, supporting individuals and families through a range of vital services. Through it all, the spirit of Cranhill has remained strong, with neighbours supporting one another and a deep sense of community at its core



## Make a Lasting Impact

Leaving a gift in your Will to Cranhill Development Trust is a powerful way to create a better future for our community. No matter the size of your gift, you'll be helping us build a stronger, more inclusive Cranhill for generations to come.

[Write Your Free Will Now](#)



"I want to say a huge thank you to all the Cranhill



CRANHILL  
DEVELOPMENT  
TRUST

# Write your free Scottish Will with Cranhill Development Trust

We give you an easy way to make a free Will with Cranhill Development Trust, a registered charity (SC033396). When you have completed writing your Will, your discount will be applied at the checkout.

[Charity Privacy Notice](#)

Start My Free Will →

▶ Watch video

# Storytelling and creative approaches

Speaking to the families of those who have left a legacy and telling their story is very impactful. Immortalising their memory.

Physical recognition of legacies through a 'legacy garden' or memorial stones, mosaics, plants, trees planted, community artwork, what is relevant to your trust?

Face to face interactions make a big difference, interactions with volunteers/beneficiaries, existing events (e.g. AGMs), specific fundraising events.



so it's been developed with the community  
to house all the things that they want and need

## Top Tips

- It's the only form of fundraising that doesn't cost your supporter any money in their lifetime.
- Focus on existing supporters and those with a direct connection to the trust such as beneficiaries and volunteers.
- Say 'gifts in wills' rather than 'legacies' – use accessible language
- No gift is too small, all legacies add up and make a difference
- Build into internal culture and buy-in – not one person's job
- Trustees/Directors need to lead by example
- Storytelling is key, making it relatable and relevant
- Be mindful of restricted gifts, timelines and practicalities

# Our legacy giving pilot –Next Steps

## 1. What have we learned so far?

- Prioritising a legacy giving campaign without dedicated resource is difficult as the return is less tangible or immediate.
- Getting policies and procedures in place and board buy-in takes time and resource
- Identifying a key tagline/phrase for multifaceted Development Trusts is harder than the big charities e.g. RNLI's 'Saving lives at sea'

## 2. What's next?

- Extending availability of the microgrant and direct support
- Consolidating learnings into a toolkit for all DTAS members
- Exploring professional legacy support for DTAS members
- Promoting Local Legacy Giving during
  - Remember a Charity Week 8 - 14 September 2025





**What's next for you?**



# Thank you!

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[www.democraticfinance.scot](http://www.democraticfinance.scot)

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