



Transforming community wealth

Getting Started With Legacy Giving

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Workshop Overview

- What is legacy giving, and DTAS pilot programme
- Key stages of a legacy campaign
- Member story
- Legacy Campaign Example
- Task 1 – Shaping your key messages
- Task 2 – Designing your legacy page



Local Legacy Giving

Leaving a gift (money, assets, or a % of an estate) in a will to a charity

- Legacy income to Scottish charities is growing at 7% per year
- But 10% charities receive 70% of legacy income

Legacy giving workshop at DTAS Conference,

- **Pilot programme for DTAS members**
- 10 DTs supported, 6 launched a legacy campaign
- Partnership with Remember a Charity
- Findings from the pilot: [Local Legacies, Lasting Impact: Learning from DTA Scotland - Democratic Finance Scotland](#)

Key Stages of a legacy campaign

1. EXPLORE: Is legacy giving right for us?

Understand what legacy giving is, why you're interested and how it could support your organisation and community.

2. DECIDE: What do we want to achieve?

Agree your purpose, level of ambition and capacity. Build support with staff and trustees.

3. PREPARE: Build your legacy offer

Identify your audiences, shape your story and key messages, create your legacy webpage and develop campaign materials.

4. DO: Get the message out there

Launch your legacy offer through your existing channels, supporters, events and local networks. Make the ask clear and the next step easy.

5. SUSTAIN: Keep the conversation going

Legacy giving isn't a one-off campaign. Keep it visible, stay connected with interested supporters, share impact and regularly refresh your messaging.

Member Story: Comann Eachdraidh Eirisgeidh

Eriskay Historical Society



Legacy campaign example: Greenpeace

**WE WON'T REST
IN PEACE**



TASK 1 – Shaping Key Messages: 15min

Use the template to think about:

- **Why** you're exploring legacy giving
- **Who** you want to speak to
- **Your audience's connection** to the organisation/ community
- **What story** you want to tell about your work
- **What impact** a future legacy gift could have

Don't worry about getting the wording perfect at this stage. The aim is to capture the ideas, words and stories that feel most important.

TASK 2 – Drafting your legacy webpage/leaflet: 15 min

Using the key messages, audience, and impact identified in exercise 1, use the template to think about how this can be presented in a webpage

TASK 2 – Drafting your legacy webpage

Once webpage is complete sense check with these questions:

- Does this sound like our organisation?
- Does it speak to the people we identified in exercise 1?
- Is the connection to our community clear?
- Does it explain what someone's legacy could achieve?
- Is there an actual ask?
- Is it easy to understand what to do next?
- Could we realistically turn this into a webpage?

Leaving the room consider what your next action can be to take this work forward?

Remember a Charity Week: 7th – 13th September:

Remember A Charity Week is an opportunity for everyone to take a moment to consider leaving a gift to charity in their Will.

This year's 'Be Remembered' campaign celebrated the funny moments, interesting hobbies and unique quirks that we remember and cherish.

How to get involved: Be remembered for even more

Our support

Get in touch with Julia in the Democratic Finance team if you want to discuss support for a local legacy giving campaign for your Development Trust.

Email: Julia@dtascot.org.uk