

The Legacy Lab Programme

How to innovate and elevate your legacy programme

A new 6 month Legacy Fundraising Innovation Programme, to create opportunities in your legacy programme through the power of innovation, and collaboration with peers and coached by world class experts

A space to solve legacy fundraising challenges and to supercharge your legacy fundraising and programme



Legacy Fundraising needs fresh ideas and solutions

The legacy opportunity is here and now with a huge transfer of wealth over the next 30 years. Charities and fundraisers need to seize it or we will miss this amazing generational opportunity. But we need to do more. What got us here, won't get us there.

What is the real problem for legacy fundraisers?

Put simply, its about being able to find ways to grow engagement and more gifts and to create ways to stand out. You need to build confidence and demonstrate growth and impact in your legacy programme in a crowded market. More specifically:

1. Charities are seeing this opportunity, but often struggle with knowing what they can do to seize this chance

2. Charities struggle balancing short, medium and long-term investment and what to do next.
3. Charities fear they may be missing out unless they take action. Unless you can keep up, your charity will lose out
4. Your supporters are being asked by others to give, and your message needs to find ways to cut through to inspire and engage or you will lose income
5. There is limited innovation in legacies - we tend to do the same things in the same way
6. It is often difficult to show impact and progress in legacies, and as a result it can prevent investment
7. The board and leadership can lose confidence in legacies and are tempted to even make cuts
8. People don't understand what they can do to impact legacy income
9. Charity and Fundraising leaders need to show progress and action, and be able to build on growth
10. Typically, half of your legacies come from people you're not even talking to and half of the people who've told you they'll leave you a legacy don't!

So what can you do? With limited budgets and resources, and with limited space to create and solve challenges, how can you create solutions to the problems you need to tackle and the opportunities to take to supercharge your programme?

There are limited opportunities to work together and with others, to share resources and solve challenges together, to be creative and innovative, to test and learn and explore.



Introducing the Legacy Lab

The Legacy Lab is an immersive and active 6 month Innovation programme for Legacy Fundraisers, Legacy Leaders, Legacy Practitioners, Heads and Directors - in fact anyone leading, running or overseeing Legacy fundraising and anyone who wants to improve what they are doing to innovate and solve problems

Run and led by two renowned and experienced Fundraising, Marketing and Legacy Experts **Stephen George and Allan Freeman**, and with access to guest innovation specialists and others, the programme is a mix of an innovation programme, a masterclass and a coaching experience. Allan and

Stephen are UK based but global fundraising consultants with a wide range of experience across all forms of fundraising but especially in legacies.

To ensure you get value we are limiting this to maximum of 10 charities with each charity able to bring up to 3 people to the workshops and supporting creative process

The Legacy Lab is the first legacy fundraising innovation hub

“Our aim is to create a space to solve legacy fundraising challenges and to supercharge your legacy fundraising and programme”

In particular it will deliver:

1. A 6 Month Legacy Innovation Programme, working together with 5 to 10 charities to innovate, test and create ideas and solutions to build legacy income
2. Finding new insights and turning them into ideas and products that you can use, for your charity and supporters
3. Learning about innovation methods and how to apply them to legacies
4. Bringing together charities to share limited resources and pool and share ideas and experiences
5. Building potential collaborative products
6. Looking for the next big idea
7. Delivering small and micro improvement's that can have a big transformation
8. A group and experts coaching experience from experienced consultants to help you build a better legacy programme

What is it and what do you get in the Legacy Lab?

Legacy Lab is a collective sharing creative experience

Each charity will agree to work with and share challenges with each other. By doing this we use the innovative opportunities of a wider and experienced group to work through challenges

Together, a series of 'challenges' or 'problems' will be agreed. Once in place each charity will commit to working through a challenge using the group and the Legacy Fundraising and Innovation experts to co-create solutions

Each solution is available to every member charity. **So, you directly host one challenge, work together on all and finally own and can use all ideas**

The programme lasts 6 months. It consists of the following:

1. 4 x one day workshop days in a shared collaboration space
2. Starting with an Introductory one-day workshop to learn about innovation, identify opportunities and create our innovation framework
3. Then a further 3 one day workshops to develop, shape and evaluate ideas
4. Innovation work-streams to test, learn and share throughout the 6 months
5. Top Line Research opportunities to test and evaluate initial thinking and ideas
6. Monthly group online coaching calls, all recorded and stored on a shared learning platform
7. Shared private online learning and communication space
8. 3 people can attend at any one time so you can share the journey
9. Ongoing private messaging group

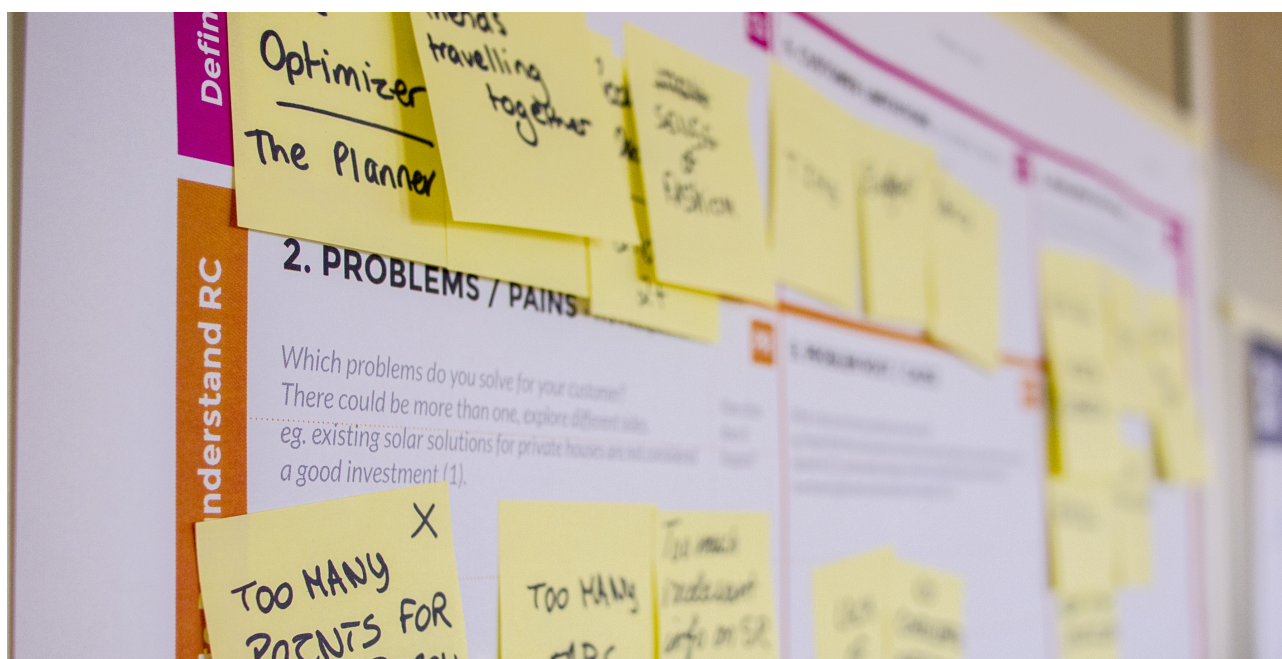
There are some powerful benefits to taking part in this unique opportunity to innovate around legacies with a small but widely experienced group

- This is a cost effective way to create a wide range of solutions and new ideas by working collaboratively
- A solution to the problem of creating space to think and solve problems
- By collaborating to find solutions, the outcomes can be tested quickly in a variety of setting and shared
- Shared ideas curated together and used together have a different quality and you will be working with coaches and peers
- Experts with experience across the world and who have done it directly who can both facilitate, coach and teach can bring together shared solutions with the group. It is a masterclass, innovation hub and coaching programme in one
- An opportunity to work together and create space with limited resources to innovate
- A chance to grow income through building a better programme
- It gives you access to the latest thinking and a world wide view on legacies
- An opportunity for personal growth and development

Some expected guidelines for the programme:

- Organisations sign up for the 6 month programme and commit to attend and contribute – dates and meetings are agreed at the outset
- Ideas and solutions, created and tested through the entire programme will be available to use for all members to maximise the range and scale of ideas and value for membership and through collaboration
- The programme will have a coaching environment where members will share in an open forum, and will be expected to do so in a safe confidential manner
- Members will be expected to contribute to the development and testing of ideas outside of the workshops and in their own charity legacy programmes through innovation projects and work-streams
- The monthly calls will be online coaching calls and will be for updating progress and thinking on innovation projects. All should be recorded and available to use later

The programme will start in September 2019 and finish in March 2020

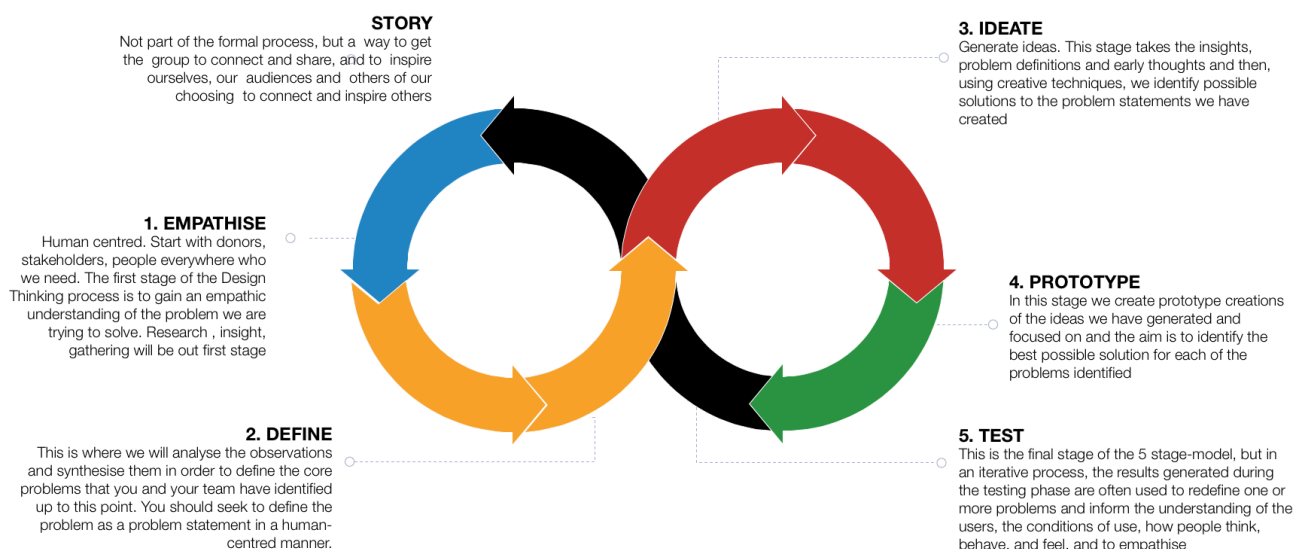


How does it work?

Legacy Lab is an innovation project with Design Thinking driving the process

For many years, both Allan and Stephen have used various forms of human centred design - starting with the user and defining the problem first. It is a discipline that helps create great solutions, often referred to as **Design Thinking**. This programme will use a Design Thinking method, and an adaption of the **Sprint** method or formula for fast innovation projects.

Design Thinking Legacy Lab Process



We will use this process to work through during the 6 months.

Preparation	Survey for each participant, gathering of insights and any research, early look at the audiences
First workshop	Orientation and Design Thinking Briefing, first sharing of issues and define problems in to statements
Second workshop	Create the ideas and design prototypes
In between workshops	Launch tests. Review and shape, challenge, learn
Third workshop	Prototype early views, any new ideas, short sharp solutions exercise, refine prototypes, create
In between workshops	Review and shape, update, new learning and innovations
Fourth workshop	First results. Plan roll outs. Further learnings captured

Follow up	Written up deck and notes, contacts and learnings packaged
Review meet up	2 hour review session to follow after 3 months

Our combination of learning styles will involve face to face and group via the workshops, zoom conference calls, a private sharing project management and communication platform (to be confirmed), expert guidance and facilitation and project manager and administrator

About your Coaches

Stephen George – Director Good Leaders



Stephen has over 30 years' experience in all forms of fundraising, and at all levels, locally, nationally and internationally. He was formerly the Head of Regional Fundraising at UNICEF UK for 3 years and has worked for Scope, UNICEF, the NSPCC, Maggie's Cancer Care Centres, Action on Hearing Loss and the RNIB. He has directly led legacy operations, including administration and marketing at the NSPCC, Action on Hearing Loss and RNIB. As Director of Legacy Fundraising at the NSPCC, he pioneered a new approach to legacies and established new and innovative approaches, including new measures, a barrier addressing charter, and the first TV and digital integrated legacy campaign in the UK. He was Chairman of Remember a Charity, steering the campaign through a rebrand, barrier insight research and the first humour led TV campaign. A new awareness

week was also introduced and new campaigns on social media saw the campaign continue to innovate.

He has recently finished serving for 6 years as Vice Chairman of the Institute of Fundraising in the UK, and is a trustee go ClicSargent. He has spoken internationally at many conferences about legacies and is a blogger, speaker and podcaster. He is currently coaching and consulting with a range of UK and international organisations.

Allan Freeman – Director Freestyle Marketing



Allan has almost 30 years' marketing & fundraising experience. He started his career working for a subscriptions marketing company analysing and projecting their future membership and revenue across 30 book clubs in many countries. He then moved to work for a marketing agency having a variety of roles finally ending as Managing Director of WWAV West (now RAPP). He set up Freestyle Marketing in 2004.

Allan has worked for many of the UK's top 10 charities and has broad and extensive experience within fundraising having been Interim Director of Fundraising for several organisations including Age UK, Breakthrough Breast Cancer and Alzheimer's Society. He was the founding holder of the UK's biggest legacy role as (interim) legacy fundraising director for Cancer Research UK with responsibility for the legacy fundraising

strategy, the c £120m (as it was then) legacy income & also the legacy administration team. Allan has also undertaken legacy projects for amongst others, Oxfam, Save the Children, RNLI, NSPCC, British Heart Foundation, Institute for Cancer Research, Shelter, RSPCA, Macmillan Cancer Support and British Red Cross. For the last 10 years, Allan has been a member of the Remember a Charity Executive Committee. Remember a Charity is a consortium of charities aimed at growing the UK legacy market for all charities.

What's next?

We have a number of interested charities considering going to the first Legacy Lab. The programme starts in September 2019, and we will be finalising workshop dates in the following weeks

Programme Launch Workshop - Week beginning 16th September OR week beginning 23rd September

Second workshop - Week beginning 7th October

Third Workshop - Early December

Fourth Workshop - February

The Legacy Lab costs £6,500 + VAT. If signed up by 31st July, there is a discounted fee of £5,995.

For more information please call Allan Freeman on 44 7957 344734 or email allan@freestylemarketing.co.uk or Stephen George on 44 7711 190510 or email stevgeorg@gmail.com