Room 2 chat summary

Questions, answers, discussion and resources

Hosted by Anaish Yilma-Parmar

Room 2 | Thursday 24 September 2026 | 12:10–16:00 BST

Anonymous summary for attendees. Attendee names and details have been removed.

About this summary

This is an anonymous round-up of the Room 2 chat. It covers a community snapshot from the polls, the key actionable learnings and stats shared, the questions that were answered (live by speakers, in the chat by speakers or hosts, or by fellow attendees), attendees' own takeaways, and the resources shared. Attendee names have been removed. Answers are paraphrased, so please check the recording for the full detail.

Community snapshot

Before splitting into the two rooms, attendees shared how they were feeling. Larger words were given by more people.

How are you feeling about legacy and in-memory fundraising at the moment?

curious excited optimistic enthusiastic hopeful keen to learn excited to learn positive challenging but positive passionate interested unpredictable inspired intrigued big opportunity slow burn grateful meaningful apprehensive concerned nervous focused

55 people responded at the opening of the conference. Curiosity and optimism far outweighed nerves.

Key actionable learnings shared

Practical ideas from speakers and attendees that you can put into practice.

- **Lead with the difference you make.** Gather stories, especially from frontline staff, and invite living pledgers to share why they've left a gift. Peers talking to peers is one of the most powerful legacy messages.
- **Put bookmarks in books.** Tuck legacy bookmarks into every second or third book in your charity shops and ask independent bookshops to stock them. Do it yourself, as it's a great way to build a relationship with your retail team.
- **Make in-memory thanks personal and tangible.** A handwritten "Thinking of you" card and a packet of seeds with a QR code drew overwhelming feedback. If you lack capacity, ask supporter care or other teams to help.
- **Choose hopeful imagery.** Avoid clichés like a sad figure on a bench. Nature, growth and symbols such as the lotus flower reflect why people give in memory.

- **Remember you're a fundraiser, not a therapist.** On difficult calls, be honest and kind, signpost to organisations such as Samaritans or Mind, gently steer back to what you can help with, and make sure you have someone to debrief with afterwards.
- **Look beyond standard selections.** Many legacy prospects sit outside the usual regular-giver and high-value segments, and deeply lapsed donors may still be engaged in other ways.
- **Get data protection right first.** Check consent, confirm your privacy notice covers profiling, complete a data protection impact assessment and consider saying where AI is involved. It is usually a small amount of work.
- **Warm people up before the ask.** Drip-feed legacy stories into magazines and emails a couple of times a year, then tailor follow-up journeys to how each supporter responds.
- **Use AI to build skills, not replace people.** Keep humans on sensitive supporter contact. Use AI to help your team learn new skills, such as building data dashboards, and show leadership quick wins.
- **Let the corporate world go first.** With new ad spaces such as AI chat tools, it can pay to wait until brands have normalised advertising there.
- **Plan for event drop-outs.** Expect about 10% of guests not to attend. Call guests the week before, keep a waiting list, and follow up no-shows with a friendly check-in.
- **Run fewer, better events.** Make events special enough that people don't want to miss them, and bring a senior leader or a frontline colleague to show supporters they are valued.
- **Go to supporters who can't travel.** Visit them, call them, or share a virtual version or video of the event.
- **Show what a gift could fund.** A needs list, or a visit to see the work first-hand, helps legacy supporters picture their impact.

Key stats shared

Figures quoted by speakers during Room 2. Please check the slides in the delegate bag for sources and full context.

94%	of Dorothy House's care takes place in the community. Its legacy campaign creative had a budget of £15,000. *Sarah Dodd, Dorothy House*
39% / 84%	are Dorothy House's gift inclusion rates through two free will partners over two and a half years: 287 wills at 39% and 41 wills at 84%. *Sarah Dodd, Dorothy House*
31%	of UK adults have given in memory, in a market worth around £2.2bn a year. Nikita noted that some in-memory research is a few years old. *Nikita Gandhi, Refuge*
76%	of legacy pledges came from people who were never regular givers. The figure comes from an analysis of nearly 11,000 pledges across around 200 charities. *John Roberts, Dataro*
93%	of pledges would be missed by targeting only people who had recently given single gifts of £1,000 or more, even though those donors are around 16.7 times more likely to leave a legacy. Targeting £5,000+ cumulative givers would miss 83%. *John Roberts, Dataro*
18	additional pledgers were found through predictive modelling in one calling campaign, potentially worth up to £432,000 in future income. Fewer than 20 people appeared on both the charity's list and the model's list. *Katie May, The Brain Tumour Charity*

Half	of the legacy income Macmillan expects over the next decade is already sitting in existing final wills. The figure comes from an analysis of 40,000 legacies, so retention matters as much as acquisition. *Steve Law, Macmillan*
50 / 25 / 25	Across around 1,000 top UK fundraising charities after Covid, about half grew by up to 20%, a quarter grew by more and a quarter shrank. The opportunity won't be felt evenly. *Steve Law, Macmillan (Charity Commission data)*
~10%	of booked guests typically drop out of any event, so plan capacity around it. *Katherine Sayer*

Questions and answers

Offline channel mix: in-memory and legacy marketing

12:10 | Sarah Dodd (Dorothy House)

Q: Do you collaborate with organisations such as Age UK and dementia charities, beyond other hospices?

There is nothing formal in place, but Dorothy House has contacts with these organisations because they are highly relevant to its patient demographic. Sarah is open to working together. Dorothy House can't reach everyone in its area, so partnering with other care providers is important.

Answered live by Sarah Dodd

Q: Our charity supports children in hospital, but our work isn't life-saving. How should we market in-memory and legacy giving when it's still in its infancy?

Go back to the difference you make. Even if your work isn't life-saving, it matters. Start gathering stories, because stories are gold. Supporters want to hear from people in uniform, like nurses and frontline staff, not people in suits. One of the most powerful things for legacies is peers talking to peers: supporters who have told you they've left a gift and are willing to share why. Another attendee added that improving quality of life, such as respite, is powerful too.

Answered live by Sarah Dodd, with an addition from an attendee

Q: I'm planning in-memory collateral for 2027. Any advice on items for charity shops?

Till space is at a premium, but shop windows work. Bookmarks have been Dorothy House's biggest success. Take your team out and place them in every second or third book yourselves, rather than asking shop staff to do it. You get to know the retail team and the collateral gets out. Independent bookshops are also often happy to take bookmarks.

Answered live by Sarah Dodd

How to connect with in-memory supporters

12:45 | Nikita Gandhi (Refuge)

Q: Are there any in-memory materials that have stood out to you, and why?

At Refuge, every in-memory donor receives a handwritten "Thinking of you" card and a packet of in-memory seeds with a QR code linking to the website. The feedback has been overwhelmingly positive because it feels so personal. If you lack capacity, ask other teams, such as supporter care, to help. For imagery, avoid clichés like a sad person on a bench. Hopeful images of nature and growth work better. Nikita particularly likes the lotus flower, which grows through mud into something beautiful.

Answered live by Nikita Gandhi

Q: Do many people request the free seeds, and do they go on to donate or fundraise?

The seeds are sent as a thank you after someone has already donated. Refuge does see recipients go on to leave gifts in wills or fundraise. Even when they don't, these small touchpoints keep the charity in their mind for later.

Answered live by Nikita Gandhi

Q: Any advice for phone calls with in-memory supporters that could become heavy or vulnerable?

Remember that we are fundraisers, not therapists. Be honest and kind. Acknowledge that they are having a tough time, explain what you can help with, and signpost to organisations such as Samaritans or Mind for wider support. Then gently steer the conversation back to what you can help with. Be kind to yourself too. The host added that it helps to have support within your organisation, such as a manager you can talk to after a difficult call.

Answered live by Nikita Gandhi and the host

Deciphering the data: the legacy myths costing you your best prospects

13:30 | John Roberts (Dataro) and Katie May (The Brain Tumour Charity)

Q: How did you approach contacting deeply lapsed donors, given GDPR?

Not having donated in four years doesn't mean supporters weren't engaging in other ways. These supporters had previously said they were happy to be contacted by phone, and the model was picking up signs that they were still engaged.

Answered live by Katie May

Q: Do we need to do anything about our privacy notice before a partner downloads data from our CRM?

The basics apply, such as completing a data protection impact assessment and making sure any third party's handling of your data is compliant. What Dataro does is profiling, and most privacy notices already cover this. Many charities are also choosing to say that AI may be involved, which is sensible anyway. Be as explicit with supporters as you can. In John's experience it is usually not much work.

Answered live by John Roberts

Q: How long does it take to set up, and how much work is involved for our data team?

Dataro connects to most common charity CRMs, extracts the data it needs automatically, and publishes predictions back onto each contact record. Set-up usually takes a couple of weeks, and a month at most. Most of the work is on Dataro's side.

Answered live by John Roberts

Q: What was the overlap between your standard selection and Dataro's list?

Very small. Around 3,000 people were sent for calling, and fewer than 20 appeared on both lists. John added that this was unusually small. Normally there is a sizeable overlap, plus groups that only the charity or only the model select.

Answered live by Katie May and John Roberts

Q: Apart from deeply lapsed donors, what other segments did the model surface?

Some non-financial supporters also appeared. Deeply lapsed donors were the main surprise.

Answered live by Katie May

Q: Can you share an example from another charity where the model found very different segments?

Models don't think in segments. They look at all the data on each supporter, so they pull people from right across a programme, including groups you wouldn't normally contact. Case studies are available on Dataro's website.

Answered live by John Roberts

Q: If I were one of the donors in this segment, what would I have received?

Legacy messages are drip-fed into normal supporter communications a couple of times a year, such as magazine stories and emails. Selected supporters then receive a legacy conversation by phone, followed by an email journey based on their response. Inquirers learn more, including about free will-writing options. Those who have already pledged receive a handwritten thank-you card and invitations to events such as webinars and meeting researchers.

Answered live by Katie May

Future focus: AI, reimagining family and communities, marketing

14:05 | Steve Law (Macmillan Cancer Support)

Q: Have you looked at running legacy ads on ChatGPT?

Not yet at Macmillan. Steve's view is that the charity sector should stay a couple of steps behind the corporate world. Let brands normalise advertising in new spaces first, so charities don't attract criticism for going first.

Answered live by Steve Law

Q: Where do you draw the line between acceptable AI use and moments that need a human?

Macmillan uses very little AI for sensitive supporter-facing contact. Anyone who emails or calls gets a human, and Steve wants to keep it that way. The excitement is in giving the team new skills. For example, a colleague used Copilot to teach herself to build a Power BI dashboard linking marketing and stewardship data, which now powers around 135 variants of legacy event invitations.

Answered live by Steve Law

Q: How do you manage leadership expectations around AI?

Expectations range from leaders who want quick results to those who want more evidence. Steve runs an informal AI learning group of around 100 fundraisers and focuses on showing enthusiasm and demonstrating quick wins. As with any internal influencing, it comes down to relationships, trust and evidence. Advocate for time to experiment.

Answered live by Steve Law

Creating meaningful moments: using events to steward and engage legacy supporters

15:25 | Lizzy Stewart, Katherine Sayer and Sanpreet Janjua

Q: Do you see high drop-out rates? Lots of people sign up but don't come.

Expect about 10% drop-out from any event. A ticket price can add perceived value. You can over-allocate places, and fewer, better events make people keen not to miss them. If numbers are low on the day, make it more intimate. Attendees added two tips. Call guests the week before and fill gaps from a waiting list. No-shows are also a chance to follow up and check they are OK.

Answered live by Katherine Sayer, with additions from attendees and the host

Q: We invited pledgers to an event, but many felt too old to travel to London. Any advice? What is the place of virtual events?

Go to them. Sanpreet visits supporters who can't travel once a year, taking flowers, stories and updates, and calls or meets people on their own terms. The host suggested asking supporters how they'd like to be included, for example through a virtual event or a video of the event sent by email.

Answered live by Sanpreet Janjua and in the chat by the host

Q: How many staff do you have running your events?

Usually three: Lizzy, her legacy officer and a fundraising colleague. Where possible she adds a member of the senior leadership team, to show supporters how valued they are, or a member of the conservation team who often already knows the guests. Events are capped at 35 people. Lizzy would like more staff, having once lost half a group in the bluebell woods!

Answered live by Lizzy Stewart

Q: Do you ever use a needs list, so legacy donors know what they could fund?

This is useful for supporters who want to know tangibly what their money could do. In health charities, the host has taken supporters to labs and spoken openly about what equipment and training cost.

Answered in the chat by the host

In attendees' own words

Anonymous takeaways shared in session polls and post-event feedback.

"How you don't need a big budget to create a campaign which has a big impact."
On Offline channel mix: in-memory and legacy marketing

"I feel like I have a toolkit to prepare myself to have conversations with in memory donors without worrying about saying the wrong thing."
On How to connect with in-memory supporters

"We aren't therapists – we're fundraisers!"
On How to connect with in-memory supporters

"Standard segmentation lists might miss a lot of legacy prospects."
On Deciphering the data

"Don't be scared and use where makes sense."
On Future focus: AI, reimagining family and communities, marketing

"Don't have to be high budget, high numbers events. The more personalised the better. Get to know your legators."
On Creating meaningful moments

Resources shared

- **Slides for every session** are in the delegate bag.
- **Refuge tone of voice and in-memory guides:** email Nikita Gandhi at inmemory@refuge.org.uk, or find her on LinkedIn.

- **Dataro Legacy Brief** (a one-page summary of the session) is in Slides and Resources. For a review of your own legacy data brief, email john@dataro.io with the subject "Legacy Audit". Dataro offered Fundraising Everywhere attendees 10% off as a new client within three months. Case studies are on Dataro's website.
- **Steve Law's experiments and interactive graphs:** purposekit.org. Steve also writes about AI and the future of legacy giving on LinkedIn.
- **Muchloved** was recommended by an attendee for its training on supporting bereaved supporters.
- **In-memory tree planting:** one attendee's charity offers this through a National Trust partnership, with a personalised engraved copper leaf.
- **Subtitles:** click CC in the bottom right corner of the video (refresh if you can't see it).
- **Can't load the stream?** The event team shared a YouTube backup feed, and the "Tech Issues" link below the chat connects you to support.

Missed a session? Use your original joining link to watch everything from both rooms on demand, including the pre-recorded session Working with bereaved supporters with Rosalind Sherlock-Jones (WaterAid). Fundraising Everywhere members also have every session in their on-demand library.