

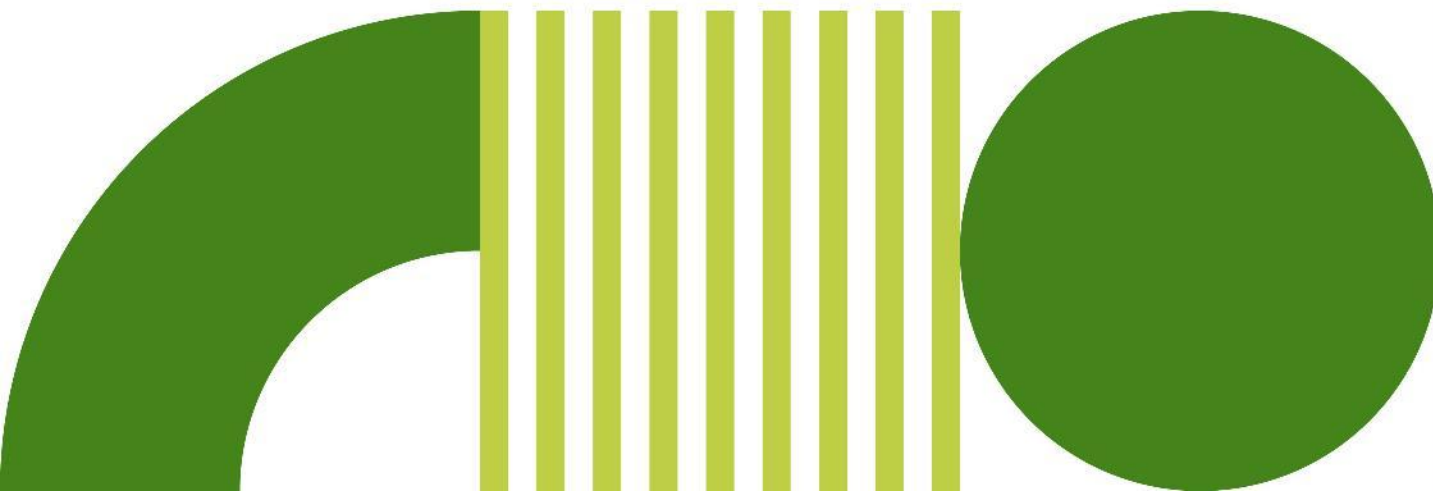


EMBEDDING LEGACY ACROSS THE INDIVIDUAL GIVING JOURNEY

LEGACY ISN'T A PRODUCT

How a lifelong relationship — not a well-timed ask — is what carries a supporter towards a gift in their will

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OXFAM

There is no them, just us.

www.oxfam.org.uk

THE PREMISE

The best legacy conversation rarely *begins* with a legacy ask.

It begins years earlier, in a thank-you call, a campaign action, a conversation with supporter care — long before anyone mentions a will. By the time the subject comes up, the relationship has already done most of the work.

WHY THE PRODUCT FRAMING COSTS US

Treat legacy as a product and you inherit its problems

Legacy as a product

- A separate campaign, bolted onto the journey
- A hunt for the single 'right moment' to ask
- Owned by one specialist team, in isolation
- Measured only when the income finally lands

Legacy as a continuation

- Grows from what a supporter already cares about
- Sits inside the journey they are already on
- Enabled by everyone who meets the supporter
- Nurtured, so the moment arrives on its own

THE SHIFT

Design around the person, not the channel

We plan around products, channels and the annual calendar. Supporters don't. What actually moves someone to leave a gift is closer to who they are than to how we reached them.



Motivations

What made them care in the first place, and what keeps them here



Values

The beliefs they want to stand behind, quietly or loudly



Identity

Who they are, and how they want to be remembered

OUR MAP OF THE JOURNEY

The Action Love Pyramids (ALPs)

Five pyramids, one for each way people meet us. Each maps how a supporter's relationship deepens, from first contact to owning the cause.



SIX STAGES, OUTSIDE IN

Reaching

Aware & understanding

Considering

Activating

Contributing & exploring

Owning

Campaigning · Volunteering · Direct · Retail · Storytelling

Where legacy lives

A gift in a will is Owning in its fullest sense. All five pyramids lead to the same centre, so every team can help carry a supporter there.

FOUR CONDITIONS FOR LEGACY GROWTH

You can't manufacture the moment. You can build the conditions that make it likely.

1

Know what they value

Use motivations and identity, not products, as your starting point

2

Make it a continuation

Weave legacy into the journey they are already on, not a separate track

3

Give every team permission

Care, volunteering and campaigning all open the door

4

Steward the relationship

Earn the moment over time, rather than chasing the perfect ask

1

Know what they value

Personas are only useful if they tell you what a supporter wants their giving to mean. Start from motivation and identity, and legacy becomes an obvious extension of a belief they already hold.

- Build personas around values, not gift size
- Ask what someone wants to be remembered for
- Let that shape the conversation, not the channel



AT OXFAM

Meet Elizabeth

Our legacy personas are built around what drives a supporter, not gift size. Elizabeth, who has no children, simply wants her legacy "to do some good". Others come through tax planning, asset release or our free-will service. The conversation flexes to each.

2

Make it a continuation

Legacy shouldn't be a separate track that a supporter is suddenly moved onto. Woven through the journey they're already on, it reads as the next chapter of a story rather than a change of subject.

- Seed the idea early, gently, without an ask
- Return to it as trust deepens, not on a fixed date
- Match the message to where they are in the journey

AT



Legacy, woven into everyday content

Legacy sits inside the channels supporters already read. Case studies run in our VOICES supporter magazine and e-news, and always-on digital content marks the moments that matter, from Diwali to Black History Month, so the idea is familiar long before any ask.

3

Give every team permission

Legacy fundraising is not the specialist team's private property. The people who open the door are usually the ones the supporter already trusts: supporter care, volunteering, campaigning.

- Train Supporter Care and Major Donor teams, regularly
- Build legacy into telemarketing welcome calls
- Open events to volunteers to learn a gift's value

10 VOICES: ACTION IN FOCUS



PJ was ultimately saying,
I TRUST YOU.

When their family friend, Paul (PJ), died of bowel cancer, Deborah, her husband Ashley and their children were devastated. Before he died, PJ entrusted the family with a portion of his Will, encouraging them to leave gifts where it mattered most. Here, Deborah shares her family's story of deciding to donate part of his legacy to Oxfam.

Remembering our friend, PJ
Ash, PJ and a couple of other mates first met at university. They formed a really close bond, united by joint interests: football and music. PJ treated us as his family. So when he was sadly diagnosed with bowel cancer, he made us part of his legacy.

Overcoming challenges as a family
We have gone through some difficult things as a family, and PJ was always there for us. Our youngest, Ashli, was diagnosed with cancer when she was four. She got through it but not without bumps along the way. The trauma has had knock-on effects for us all. And our eldest, Luca, has had some mental health issues.



What matters to us

Ash took care of PJ in his last year of his life, going to visit him often. They'd both, PJ had said 'do what you need to do to make a difference'. I asked my girls where we should leave PJ's money, and at that time, Ashli was involved in the Gaza appeal. She would use gifts to her age putting red stickers saying they had no home. She said we should focus on families there.

"Our objective is to make a difference."

The right decision

We decided on Oxfam based on the promise that we had given up going to Gaza strips. There was a bond of trust. I also spoke to a fundraiser at Oxfam who reassured us that the money would be accounted for. She would even send me reports from Gaza. There was a feeling of honesty in what they said they could do, and doing it.

A gift for Oxfam, from PJ

Deciding where to donate PJ's legacy was a journey, but we felt comfortable that it would go to a trusted partner in Oxfam. Through Oxfam, PJ's legacy could make a better life for other people.



LEAVE A LEGACY. STAY IN THE FIGHT.

If you believe in building a better, more equal world, you can stay in the fight by leaving a gift to your Will to Oxfam.

Click the code or visit the website below to learn more or sign up for a free gift to Will guide.
oxfam.org.uk/leaveyourwill

01 800 100 000
POSTCARD

PJ's gift began with a Supporter Care call

A £17,000 gift to our Gaza response started as a chain of ordinary interactions between colleagues and a supporter — no specialist in sight at the start. Legacy happened because several teams felt able to play their part.

4

Steward the relationship

Stop hunting for the perfect moment to ask. Steward the relationship well enough and the moment arrives on its own - often the supporter raises it before you do.

- Thank and involve, long before you ask
- Treat enquirers as insiders, not leads to convert
- Measure the relationship, not only the realised gift



Enquirers as insiders

When someone asks about leaving a gift, we treat them as an insider, not a lead to chase. We answer at their pace, keep them close and let the decision take its time.

THE SAME THREAD, RUNNING THE WHOLE WAY THROUGH

Our “Stay in the Fight” narrative gives supporters one continuous idea to belong to. The same story runs from a first action to a gift in a will — so legacy never feels like a new conversation, only a deeper one.



One narrative. One relationship. Legacy as its natural conclusion.

WHERE LEGACY ACTUALLY SHOWS UP

None of this is a legacy campaign. It is legacy living inside the things supporters already receive, and the teams they already speak to.



Supporter magazine & e-news

Legacy stories run inside VOICES, not as a separate mailing



Always-on digital content

Diwali, Black History Month, “an act of care, love and defiance”



Stay in the Fight campaign

One narrative, carried into equality moments like Pride



Supporter Care & Major Donors

Regular legacy training and catch-ups with both teams



Telemarketing welcome and nurture

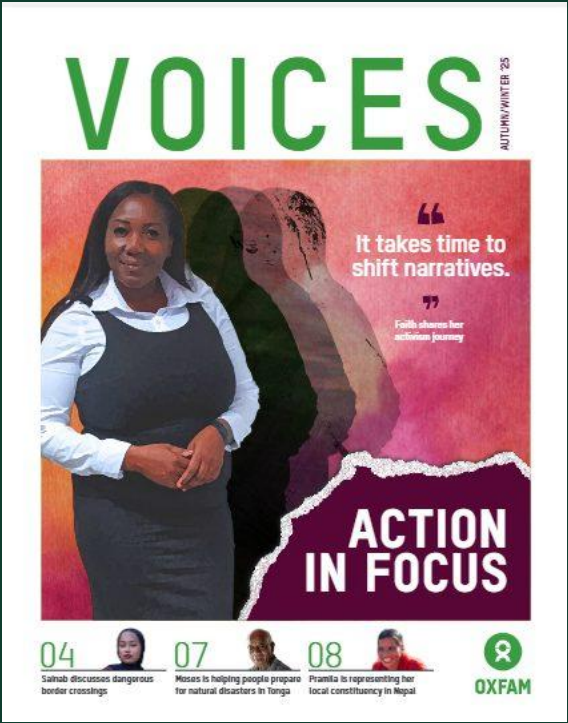
Legacy built into how we welcome supporters this year



Volunteer events

Volunteers learning our work and the value of a gift

ONE NARRATIVE, CARRIED ACROSS EVERY CHANNEL



Mainstream supporter magazine



Legacy woven into the story



Stay in the Fight, into Pride

ALWAYS ON, ALL YEAR ROUND

LEGACY TIED TO MOMENTS OF MEANING

Our always-on content meets people during the moments they already mark, where legacy needs no translating and no fundraising date.

DIWALI

**Reflecting on light,
legacy and love**

Meets supporters during a festival about light passed on from one generation to the next.

BLACK HISTORY MONTH

**Why culturally
sensitive wills matter**

Makes the case for wills that honour culture, faith and family, not a one-size template.

PRIDE

Let your pride live on

Carries Stay in the Fight into Pride, linking equality today with the generations to come.

ANY TIME

**A will is an act of care,
love and defiance**

Reframes writing a will as an expression of values, rather than a piece of admin.

WHAT TO TRY IN YOUR OWN PROGRAMME

1

Embed legacy messaging

Find where you can embed your legacy messaging readily within existing journeys.

2

Rebuild one persona around values

Ask what that supporter wants to be remembered for, and let it reshape the messaging.

3

Brief one non-specialist team

Give supporter care or volunteering the words and the permission to open a gentle conversation.

4

Add one early, no-ask touch

Introduce lasting impact somewhere it currently isn't, long before any request.

IF YOU REMEMBER THREE THINGS

KEY TAKEAWAYS

- 1 Legacy is a continuation of a relationship, not a product to be sold.
- 2 The moment is earned across the whole journey, not found on a calendar.
- 3 Every team that meets a supporter can help legacy happen.

The values people champion today
can go on shaping the future long after they're
gone.

Our job is simply to make that easy to see.

THANK YOU!