

How to run a legacy campaign in your church

A Simple Guide



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# Why?

## Gifts in Wills

Each year around 4,000 people leave a gift in their will to their local church. Legacies help to fund mission projects and maintain beautiful church buildings and are an expression of gratitude and thanksgiving towards God.

Church of England churchgoers are incredibly generous and willing leaving legacies to charities, but not always to churches. The 2020 Anglican Giving Survey found that Anglicans are three times more likely to leave a legacy to charity than to their church, and only 15% have ever been asked to consider including a gift to their church.

Many people would like to know how they could leave a gift in their will to their church but may not know how or who to speak to. It is important for all churches to make information available and to inspire members about the difference gifts in wills, no matter how large or small, can make.

Running an occasional legacy campaign in your church and mentioning the importance of legacy giving throughout the year are essential

## Will Writing

For nearly 500 years the Church of England has encouraged people to make a will as a simple act of good Christian stewardship. Learn more about why every Christian should have a will. Will writing can often seem like a time consuming an expensive thing to do – and that’s a big reason why many people put it off. But writing a will and planning your funeral are two simple acts of good stewardship. God entrusted us to use his gifts wisely, for the good of our loved ones, our church family and the wider world. In thanksgiving, we should also take will writing seriously – setting our affairs in order and stewarding them wisely to the end of our time on earth and beyond.

# When

We suggest running a legacy campaign at one of the following times of year, and changing the tone of the campaign to suit the season:

* January – the most popular time for will writing in the UK as people look to tick things off their to-do list done after Christmas. Your campaign could focus on the important of will writing as a good act of Christian stewardship.
* Spring – a time of hope and reflection during Lent. Your campaign could focus on how legacies left to your church will fund your vision for mission and ministry in future years.
* September/October – Harvest time is a great chance to celebrate God’s generosity to us. Your campaign could focus on how leaving a gift in a will to a church are an expression of gratitude and thanksgiving to the blessings we have received from God.
* November – a time of remembrance and thanksgiving for those who have gone before us. Your campaign could celebrate legacies and benefactors from the past and what they have enabled your church to achieve.

Ideally, you should also mention legacies throughout the year when you talk about giving. See ‘Example Communications’ for ways in which you can talk about legacy giving throughout the year.

# Who

## Leadership

The success of your legacy campaign depends on leaders who understand the importance and value of legacies are willing to champion gifts in wills.

You will need the following roles involved in planning and delivering your legacy campaign. The same person may hold more than one of these posts, so don’t be discouraged if there are only one or two of you to run the campaign:

|  |  |  |
| --- | --- | --- |
| **Role** | **Role Description** | **Who could do this?** |
| Planners | One or two people who take a coordinating role and can plan when the campaign will take place, who will be involved and what is required. | * PCC
* Giving/Stewardship/Finance Sub-committee
* Church Wardens
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| Researcher | Someone to find out if your church has received legacies in the near and distant past and what they have funded in your church. Someone to find out who might be a legacy story teller in your church.  | * Treasurer
* Clergy
 |
| Writers | Someone to write some wording about legacies to go on your website, in leaflets and notices etc. | * Anyone involved in your campaign
 |
| Designer | Someone who is willing to design simple leaflets and posters, a web page, thank you letter, social media posts etc.  | * Web editor
* ACNY editor
* Social Media lead
 |
| Speakers | People who are willing to talk about legacies during your campaign, in sermons, in the notices or during a special presentation. You will need church leaders who can explain why legacies are important and what the vision for your church is.  | * Clergy
* LLMs
* Church Wardens
* Treasurer
 |
| Story Tellers | Has anyone pledged to leave a gift in their will that you are aware of? These can be your most powerful advocates if they are willing to share the reasons why they have left their legacy to your church. For inspiration, see this [great pledger testimony from a church in Portishead](https://www.churchofengland.org/our-faith/lasting-gift-your-church/amazing-gift-case-studies/tricias-legacy-st-peters-church).Are you in contact with the family and friends of someone who has left a legacy to your church previously? They may be willing to share the story of why their loved one left a gift in their will to your church.  | * Legacy pledgers
* Friends and family members of those who have left a legacy in the past
 |
| Legacy Champion | A named contact within your church who feels confident to answer questions about legacies and people can talk to about their own legacy in confidence.  | * Clergy
* Church Warden
* Treasurer
 |

## Audiences

Your audiences are those you are aiming your campaign at and ideally who you would like to consider leaving a gift in their will to your church.

The three key groups to reach during your campaign are:

Church Congregation

This group will include your warmest existing supporters who may already give regularly to your church, as well as those who don’t currently give financially but support with time and talents too. Your church congregation are likely to be motivated to leave a legacy to your church when you show how a gift in their will can help your church’s mission and ministry thrive into the future. You can communicate with this group everywhere they usually meet or get information, particularly during services and in notices, newsletter, social media and emails. Your church building will be a key focus point for making materials available.

Friends Group

This group support your church financially but are not likely to be as motivated by the theological aspects of legacy giving as your regular church family. This group are more likely to leave a legacy if you show how legacies will help to maintain your church’s heritage and historic fabric or traditional role in your community. If your Friends Group is managed by a separate committee, make sure you speak to them in good time about your legacy campaign and ask if they are happy to be involved. You can reach this group through the Friends newsletter, website and by hosting a legacy event.

Wider Community

This group may not attend regular services in your church or support at present but likely value your church’s role in the local community, especially if you do a lot of social outreach work with lots of volunteers, or if your church is of heritage significance or a local focal point in your community especially if you have baptisms, weddings or family funerals at your church. People who value these aspects of your church’s presence in the local community may well leave a legacy if asked. You can reach this group by hosting a legacy event.

# What to do

There are 3 steps to running a legacy campaign:

## 1. Plan

* Decide who is going to be involved in running the campaign
* Choose when your campaign is going to take place
* Write and agree a PCC legacy policy ([example template](https://www.churchofengland.org/sites/default/files/2020-12/Example-Legacy-Policy.docx))
* Order a [free PCC Legacy Toolkit](https://www.churchprinthub.org/product.aspx?prod=SL1014PK&cat=460&ret=%3Fcat%3D460)
* Find your story tellers and ask if they would be willing to be involved in your campaign by sharing their story (either in person or written down for your materials).

## 2. Create your resources and share your vision

* Order an inexpensive [legacy leaflet](https://www.churchprinthub.org/product.aspx?prod=SL1018MFDL&cat=460&ret=%3Fcat%3D460) or [legacy bookmark](https://www.churchprinthub.org/product.aspx?prod=SL1017BK&cat=460&ret=%3Fcat%3D460%26p%3D1) designed and customised for your church
* There are lots of other [legacy leaflets, posters and bookmarks](https://www.churchprinthub.org/?cat=460) available free of charge too
* Create a story of how your church could [benefit from future gifts](https://www.churchlegacy.org.uk/an-amazing-gift/tricias-legacy-to-st-peters%C2%A0)
* Make information available on your church website ([there’s also a national website you can link to](https://www.churchofengland.org/our-faith/church-legacy))
* If you want your audiences to use the [Church of England Free Will Scheme](https://www.churchofengland.org/our-faith/lasting-gift-your-church/writing-your-will/free-wills), include the link in your resources. You may also have a friendly local firm of solicitors that might write or update wills for your church members for a discounted fee or on a donation basis.
* Use our example communications below to create posters, social media posts and newsletter articles to share wherever your church meets in person and online.
* Plan sermons or talks to deliver to your church congregation over the course of your campaign over a few weeks or a month. Each sermon or talk could mention a different aspect of legacy giving, share a different case study, or tie into a different bible passage. Your talks don’t need to be long – if there isn’t someone to mention legacies in a sermon slot, a few minutes during your notices would be fine.
* Plan and run a legacy event

## 3. Launch and run the campaign

* Make sure all your new resources are freely available in your building
* Deliver your sermons or talks
* Send out emails and letters. Post your social media posts. Include your articles in your newsletter and or magazine.
* Ensure there is someone available throughout the campaign to answer questions
* Run a legacy event

# What to do afterwards

Once your campaign has ended, you can still talk about legacies little and often to remind people continually of their importance. You should aim to repeat your legacy campaign every other year and talk about legacies throughout the year with the occasional newsletter article, mention in the notices and include in thank you letters (see example in ‘Example Communications’).

A great way to do this is to share stories when you receive legacies and celebrate what they enable your church to achieve. There are lots of example case studies here to inspire you: <https://www.churchofengland.org/our-faith/church-legacy/amazing-gift-case-studies>

Finally, ask your clergy to remind people of [the importance of will writing](https://www.parishresources.org.uk/wp-content/uploads/Why-every-Christian-should-have-a-will.pdf) at particularly moments, especially people preparing for baptisms and weddings.

# Where can I get help?

**Your Diocesan Giving Advisor** <https://www.churchofengland.org/resources/building-generous-church/about-national-giving-team/diocesan-giving-advisors>

**National Giving Team**

giving@churcofengland.org

**For more information**

<https://www.churchofengland.org/our-faith/church-legacy>

<https://www.churchofengland.org/resources/building-generous-church/enabling-giving/giving-mechanisms/legacy>

# Example Communications

**Church Newsletter or Parish Magazine Notices**

* A Good Time to Write a Will​
* A Generous Legacy left to Transform St Helen’s Future
* How to Support our work at St Helen’s
* Keeping our Church at the Heart of our Community

**Church Newsletter or Parish Magazine Legacy Advert**

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| --- |
| Thanks to gifts in wills…​​…every bereaved family is comforted​…every school assembly is taken​…every baptism is celebrated​…every foodbank is stocked​…every sermon is preached ​…every communion is celebrated​…every person is shown the love of Christ through our care, compassion and comfort.​Find out about how a gift in your will to the River Valley Parish can help find our mission and ministry to this community for future.www.rivervalleyparish.com/giving |

**Facebook Post**

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**Example Thank You Letter**

At this time of year we write to thank you for your support to our wonderful St Mary’s Church. ​

​Thank you to everyone who gives regularly through the Parish Giving Scheme, by Standing Order, to the weekly collection and to everyone who has included a gift in their will. ​

​Everything we do relies on the generosity of those who give their time, money and talents to support our ministry.​ Thank You.

**Wording for your Website and A Church Near You page**

Leaving a gift if your Will is an amazing opportunity to make a final gift to God. This will make a lasting difference to the future of St Michael's, and its ministry and mission in our local community.

No matter how big or small, every gift in every Will can make a significant impact. Gifts in Wills are an important part of Christian giving, and leaving a gift to your church is a way to thank God for all the blessings you have received in your lifetime.

Legacy gifts can be used to fund mission and ministry projects, help to maintain church buildings, and ensure faithful people can be at the heart of this community for years to come.

At St Michael's we welcome all legacy gifts, and we promise to use them to make a difference. If you want to speak to someone from St Michael's about leaving a legacy in confidence, please contact Rev Tom Smith.

**Our legacy policy**

The Parochial Church Council’s (PCC) policy is to use legacy gifts to fund development projects inside our church buildings and wider parish. This could be building maintenance and improvements, purchasing new equipment, or investing in people.

It is a great help if legacy gifts are left for general purposes, and not for a specific appeal or project which may have ended by the time you have died. The PCC can discuss with the executors of your Will how your gifts can be utilised at that time. This can be a wonderful experience, as both parties can discuss areas of the church’s work that interested you. For example, this could be music, buildings and facilities, or children’s work.

**HOW TO LEAVE A LEGACY GIFT**

**Write your Will for free online**

Will writing can often seem like a time consuming and expensive thing to do – and that’s a big reason why many people put it off. The Church of England has partnered with award-winning online Will-writing company Farewill to offer a free online Will writing service (RRP £90). You can complete from the comfort of your home in less than 30 minutes.

Making a Will and keeping it updated is the only way to make sure your wishes are carried out after your death, giving you peace of mind that you can continue to support the family, friends, and charities you love.

If you live in England or Wales, you can redeem your free online Will by clicking the link below:

<https://www.churchofengland.org/our-faith/lasting-gift-your-church/writing-your-will/free-wills>

**Need to write a Will?**

We strongly advise you to seek professional advice and to see a solicitor when making or revising your Will. If you need help finding a local Solicitor, [please click here.](https://www.churchlegacy.org.uk/writing-your-will/find-a-local-solicitor)

You may wish to write a Letter of Wishes to sit alongside your Will. Click here to download [the Church of England's Letter of Wishes template.](https://www.churchlegacy.org.uk/downloads/letter-of-wishes.pdf)

A standard Will costs around £199 + VAT, and the Solicitor should outline the cost upfront before you visit them. You may find [the Church of England’s 'Preparing to visit your Solicitor](https://www.churchlegacy.org.uk/downloads/preparing-to-visit-your-solicitor.pdf) document helpful.

**Made a Will already?**

It is a simple process to make an amendment to an existing Will to leave a legacy to our church. This is done via a Codicil (an amendment document) to your existing Will at no cost. A template Codicil can be [downloaded here](https://www.churchlegacy.org.uk/downloads/a-codicil.pdf). If your Will is more complicated, please make sure you consult a solicitor to ensure your wishes are recorded accurately.

# Shape  Description automatically generatedLegacy Campaign Planner

|  |  |
| --- | --- |
| **Campaign Dates** |  |
| **Campaign Team and Roles** |  |
| **Legacy Champion** |  |

**Campaign Checklist**

Before you launch you campaign, have you:

[ ]  Written a PCC Legacy Policy

[ ]  Designed and ordered legacy leaflets for your church

[ ]  Identified legacy stories or legacy story tellers

[ ]  Created a legacy page on your church website or ACNY page

[ ]  Planned a legacy event

[ ]  Planned how you will follow up after the campaign