

# LET'S HAVE A BETTER CONVERSATION.

*Legacy*

We are all on a journey. We all want to be remembered, to have made a difference and to live on. At Blakely, we are building a legacy. Your legacy through your mission, your cause, your fundraising and your supporters.

We believe in the power of legacy giving. The power to live on through a gift.

We believe in these guiding principles for legacy fundraising. They will help us deliver in everything we do.

**By understanding behaviour**, we drive a human centered approach to creating experiences that inspire action. From tiny changes to big steps, these can make legacies a normal and sought-after moment and destination. We believe that being focused on **behaviour change** is at the heart of great donor centric legacy fundraising

**We believe that every donor should have the opportunity to leave a gift** to the causes they are passionate about. The chance to experience a journey that inspires them, and that is filled with meaning, fulfilment and joy

Legacies are part of the fabric of the donor journey. **We champion integrating legacies** through everything, making them visible, open and attractive.

Every touchpoint and **every moment must be a powerful and joyful experience**. By delivering an amazing experience we will help organisations create standout experiences and deliver on their commitment to excellence.

Through our actions, steps and behaviour, we will build **meaningful relationships and connections**.

**Conversations will drive our approach.** We believe in the power of engagement through sparking a conversation, measuring the engagement, the moments and the outcomes and inspiring people to raise their hands and explore a legacy and a gift in their Will.

**We place supporters first.** Their experiences, hopes and fears will play central in all we do.

**We focus on delivering outcomes**, measuring the right things, building future value and a range of measures that tell the right story and give confidence to invest and drive a powerful long-term strategy.

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By inspiring a better way of engaging donors, with their needs at the centre of everything we do, we will build a better legacy journey together.

Our principles drive our fundraising and marketing. They drive our relationships and services, our passion and commitment.

We will break free from old ways of legacy fundraising and open up a new way, a way that is in tune with the donor and their needs and behaviour, not the internal forces of charities that can drive donors away. We respect and understand privacy.



We will use our fundraising and marketing skills and experience to influence a wider audience to grow legacies. Going deep with supporters, building community and belonging, and wide to those who are harder to reach.

We recognize that charities don't see cause and effect – that being proactive in legacies can really make a difference. We will challenge that view and work to show a wider perspective. We will use our fundraising and marketing skills and experience to influence a wider audience to grow legacies. Going deep with supporters, building community and belonging, and wide to those who are harder to reach.



We believe that if a donor reveals a legacy intent, we should take that at face value and celebrate, but equally we believe that for many, they won't ever tell.

**We will embrace that.**

**We believe in legacies and the power of a gift in a Will.**

By inspiring a better way of engaging donors, with their needs at the centre of everything we do, we will build a better legacy journey together.

We understand that financial planning is important but that is not the way in for the many. We will navigate that. We know that charities need to show a return, but we will find different ways to show impact and long-term future value. We will champion that.

**If you want more information on how we can help you transform your legacy program, contact Kimberley at [kimberley@blakelyjourney.com](mailto:kimberley@blakelyjourney.com) or 905 727 6188 x245.**



# HOW WE CAN HELP YOU *transform* YOUR LEGACY GIVING PROGRAM.

**Legacy Reviews and Audits** – where are you at, what has been successful, where are the opportunities? We can help you take a step back and find a new direction.

**Legacy Strategy and a Way Forward** – create a cutting-edge strategy and multi-year integrated plans to move legacies to the next level.

**Business Case Support and an Investment Plan** – develop a powerful compelling internal case, and find new ways to measure future value and success.

**Legacy Reporting & Analytics Tools** – let's look deeper at past performance and find insights that can transform your program and drive new results with new measures.

**Legacy Creative and Proposition** – driven by audience, we will find your legacy proposition and creative platform to be used across all tactics and channels.

**Integrated Legacy Campaigns** – from mail to digital, email, media, videos, TV, events and conversations, we will reach and inspire and build powerful integrated campaigns.

**Legacy Stewardship and Communications** – Nurture long-term relationships and results with a program of great stewardship and communications.

**Interested in learning more? Contact Kimberley Blease at 905 727 6188 ext 245 or at [kimberley@blakelyjourney.com](mailto:kimberley@blakelyjourney.com)**