Expressions of appreciation and condolences to family members of legators

LEGACY LINK CONSULTANCY LTD

A discussion document

Charities express appreciation to family members in a wide range of ways. Sadly, not all are as the family might wish, as pointed out at the recent Legacy Fundraising Conference by Penny Jeffreys, the daughter-in-law of a deceased benefactor. So at Legacy Link we have created this discussion document to help charities consider the issue.

We must stress that the following are not agreed procedures for Legacy Link consultants, who are bound by the policies of each charity we work with. Rather, this document is aimed to assist a dialogue within voluntary organisations to question if they are making the most of the interaction they can have with the families of those who give so much support through their wills.

A few charities include a personal letter or card to the family once the charity has been notified of the gift. The gold standard here is: "What would the benefactor think of this letter if s/he were still alive?"

Such a letter or card should incorporate:

- An expression of condolence
- Sincere appreciation of the intention of the deceased person to benefit the charity
- An invitation for a member of the family to keep in touch
- An indication of how the charity might use the funds left through gifts in wills**.

Where the benefactor was a past contributor to the charity:

- An acknowledgement of the support that s/he had given during her/his lifetime*
- Any relevant points about the particular interests of the now deceased or other relevant personal information known to the charity*

For data protection reasons, administrators may not wish to pass on the identities of family members. Therefore, such a letter/card would be sent to the estate administrators for forwarding, with a covering letter. We appreciate that Executors have a great deal of work on their hands, and so it would be good practice to supply a pre-stamped envelope on which the name and address could be written. So that the Executor knows what the letter contains, a copy should be attached to the charity's letter.

If the person dealing with the estate is a non-professional, charities should express gratitude for the amount of work involved in executorship.

Because funds for charity administration are always under considerable pressure, the charity may prefer not to send out an additional letter to the Executor/estate administrator, but incorporate the above points, with the intention that the letter could be photocopied and sent on to the family when convenient.

*So that the letter properly reflects the support and interest of the benefactor, it is essential that those dealing with the administration of legacies have direct access to the supporter records held by the charity and that the charity maintains accurate records.

** We appreciate that only a very few charities are able to undertake to use legacies in a particular way; all charities need to have flexibility as to how the funds are best used. As an example, a charity may work in a fast-changing field where its projects may last less than a year. However, for the majority of charities, an indication of the practical value of the gift would, we believe, be of great significance.