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# A Snapshot of Legacy Donations in the Republic of Ireland 2004 Update

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'Other factors militate against a growth in legacy income. An example is the propensity of legacy pledgers to spend more of their assets in later years on a more active retirement. People are living longer and are more aware of the fact that they may need to provide for themselves in later life, rather than relying on the state to do so'

(Wilberforce)

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# Introduction

Welcome to the third edition of the PCI Legacy Snapshots which covers the year 2004.

The publication of the report is timely, given recent media coverage about the €8 million legacy left to Society of St Vincent de Paul and the new proposed EU legislation to establish a European Certificate of Inheritance. I also hope that the findings in this report will compliment the recently published research on Legacy Giving in Ireland conducted by Amárach Consulting on behalf of Legacy Promotion Ireland.

In order to help draw conclusions from the survey we have focussed exclusively this year on the twenty organisations who have supplied information for all of the six years from 1999 to 2004.

I'd like to thank all the participating organisations and David Duggan, the research intern at PCC, who undertook the desk research and helped to finalise the report.

Best of luck with your legacy fundraising,

John Sutton  
Director

# Objectives of the Research

The objective of the research is to help develop a greater understanding and knowledge of the scale and nature of legacy fundraising in the Republic of Ireland.

More specifically, the research sets out to establish:

- The amount of legacy income received by selected NGOs
- The number of bequests received
- The percentage of total voluntary income provided by legacies
- The trends within legacy giving over the 6 year period.

## Methodology

The research was conducted by means of an email survey with telephone follow up during the summer and autumn of this year. The questionnaire asked each organisation for the following information:

Gross Legacy Income for 2004

Total Number of Legacy Bequests in 2004

Gross Voluntary Income for 2004

## Sample

The sample consists of 20 NGOs. It is open to any NGO to join in the survey. There were no quota controls on the sample composition. The sample currently consists of the following type of organisations:

- Health & Children
- International Aid & Human Rights
- Community & Anti-Poverty
- Rights-Based

# Legacy Fundraising

## Some examples of successful international appeals

Traditionally legacy fundraising has concentrated on promoting the 'mechanism' of making a donation to charity in one's will. In the past fundraisers generally have often been limited to such tactics as advertising near to the 'births and deaths' columns in national newspapers or using reply tick boxes on mailings to allow potential legators request legacy donation and will making information. According to some commentators such traditional thinking has restricted the potential for legacy fundraising on a more wide spread and creative scale.

Over recent years a new method of legacy fundraising has begun to be developed, one that is concentrating on a message that emphasises legacy fundraising as a way for people to leave their mark on the world. This new strategy has gone hand in hand with the development of large-scale umbrella organisations dedicated to legacy fundraising in places such as the US, Canada and the UK. Ireland has now joined these ranks with the recent launch of the legacy consortium's website.

### UK Legacy Consortium

According to several reports the 'Remember A Charity Organisation' in the UK is combining effective campaigning with research that has resulted in encouraging increases in awareness and levels of legacy donations. The organisation was launched in October 2002 with 88 registered charities and has since expanded to over 140.

At 40% and raising over £1.3 billion each year it is estimated that charitable legacies in the UK represent the largest single source of voluntary income to UK charities.

Recent trends indicate that the growth in legacy income for smaller, less traditional 'legacy charities' has been significantly faster than for their larger more established counter parts. Charities with legacy income of less than £7m per annum have seen their income grow by 5.6% each year compared to 2.3%

amongst the largest charities.

In the UK the breakdown by sector is as follows:

- Health Related charities account for 33% of the legacy market,
- animal welfare for 17%,
- disability organisations for 10%,

The highest percentage is received by charities operating in the welfare and housing, conservation, environment, international aid and human rights sectors with 45%<sup>1</sup>.

According to Remember a Charity a recent press and (for the first time ever) interactive television advertising campaign fronted by Michael Buerke proved very successful in raising awareness levels about legacy donations. Further research carried out on behalf of Remember A Charity suggests that 68% of adults in the UK would now choose to include a donation to a charity in their will<sup>2</sup>. For more information on Remember a Charity go to [www.rememberacharity.org.uk](http://www.rememberacharity.org.uk).

### **North American Legacy Consortia**

The US has also a strongly developed Legacy fundraising group, the National Committee on Planned Giving (NCPG). It evolved out of the Leave A Legacy campaign which began in 1994 as a small community project and has since expanded the program across the United States and into Canada. Currently there are 165 committees in the US and 24 in Canada.

The NCPG differs from the Remember A Charity organisation in a number of ways. It is primarily community based and is made up of Planned Giving Councils, which are local chapters that provide professional education and support for the development and networking of professionals, charities and donor advisors. There is also the Leave A Legacy Campaign, a public awareness

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<sup>1</sup> <http://www.fundraising.co.uk/blogs/newswire/2006/09/01/remember-a-charity-reveals-shift-in-legacy-market/>, accessed 9th Oct 2006.

<sup>2</sup> <http://www.rememberacharity.org.uk/news.jsp?newsID=10>, accessed: 11th Oct 2006.

campaign, the mission of which is to increase the quality and quantity of planned gifts.

Research figures are difficult to obtain however, some from 2005 estimate that charitable bequests in the US made up 6.7% of total estimated charitable giving which is estimated at \$17.44 billion<sup>3</sup>.

Research on charitable giving in Canada from 2004 indicates that 22.2 million Canadians (85% of population) made a financial donation in 2004 estimated to be worth \$8.9 billion. Of this figure, legacy donations account for 9% of total voluntary donations and 5% of total donation values.

The NCPG and CGAP have also recently joined forces with the European Association of Planned Giving to create the International Gift Planning Alliance (IGPA). Their aim is to advance the mission of each gift planning association through shared information, resources and services. The alliance is also concerned with exploring cross border giving along with offering consultancy and information services related to taxation and legal issues surrounding philanthropic giving. For more information go to [www.ncpg.org](http://www.ncpg.org).

### **The Donating Irish – can they give more legacies?**

As part of another PCI research project, the NPAS survey (Non profit Awareness survey) people have been asked 3 times (between 2003 and 2006) if they have made a will. The results have been reasonably consistent with 22-25% saying yes and 75-78% saying no. 15% of people say they have, or would, include a charitable bequest in their will.

In the UK more people are including a charity in their will – between 2000 and 2005 the percentage of will-makers who have included a charitable bequest has increased from 10 to 15 %. When asked whether they would include a charity in their will if writing one today, as many as 62% of the general public stated that they would leave a donation to charity. Women were more likely (66%) than men (59%) to choose to donate to charity.

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<sup>3</sup> American Association of Fundraising Council  
[http://www.givinginstitute.org/about\\_aafc/index.cfm?pg=chart1.cfm&ID=xgusa1](http://www.givinginstitute.org/about_aafc/index.cfm?pg=chart1.cfm&ID=xgusa1)  
accessed: 9th Oct 2006.

# Main Findings

As in the previous reports we have asked for the same three pieces of information, total legacy income, the number of bequests and the size of voluntary income and the key findings are:

- (1) Annual legacy income has increased by 6.7% from 2003.
- (2) Annual legacy income has increased by 118% from 1999 from €5,392,420 to €11,742,793 in 2004.
- (3) The year on year increase of 6.7% is the smallest since 2000.
- (4) The St. Vincent de Paul (SVP) continues to raise considerably more than all other charities participating in the survey. In 2004 its legacy income accounted for 46% of the total.
- (5) Trócaire, for the first time, have overtaken Concern and moved into second place.
- (6) The Community/Anti-Poverty and International Aid/Human Rights groups of organisation share the bulk of legacy incomes with 47% and 44% in 2004, respectively.
- (7) The seven overseas aid organisations in the survey raised less legacy income than SVP in 2004.
- (8) Between 2002 and 2004 half of the organisations generated 5% or less of their voluntary income from legacies.
- (9) One organisation, the Arthritis Foundation generates over 60% of its income from legacies.
- (10) Excluding the highest and lowest organisations, the average percentage of legacy income as a % of voluntary income is 7.

(11) The number of bequests declined by 8% from 345 to 316 between 2003 and 2004.

(12) 2004 was the first year that the number of bequests declined.

(13) The average bequest value varies greatly between organisations.

(14) The highest single value is SVP at €61,389, followed by the Red Cross at €49,443.

(15) Oxfam and Sightsavers bequest average is just under €5,000.

One of the main insights of the Legacy Snapshot is to confirm that legacy funding for Irish charities seems to be substantially less when compared to their UK peers.

It is another project to try to determine why this is so. Is it that Irish people make fewer bequests because they are less generous, because charities are not asking properly or that they too worried about the costs of healthcare in their older years? Maybe it is combination of all three. Whatever the reason Irish charities seem to have a long way to go before they reach the 30-40% legacy norm of the UK.

**TABLE 1: LEGACY INCOME 1999-2004**

<b>ORGANISATION</b>	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>TOTAL</b>
Society of St. Vincent De Paul	3,244,658	2,654,346	3,682,911	4,669,909	5,012,381	5,463,663	24,727,868
Trócaire	673,415	1,324,074	1,747,748	743,050	1,679,230	2,485,194	8,652,711
Concern	883,300	673,092	1,264,972	1,663,944	1,690,122	1,141,648	7,317,078
Goal	160,416	786,108	437,396	510,728	841,037	808,181	3,543,866
The Irish Red Cross	95,993	53,236	881,114	242,519	636,477	593,319	2,502,658
The Irish Heart Foundation	97,190	299,421	357,639	269,453	369,843	420,915	1,814,461
Focus Ireland	100,310	16,891	228,874	134,000	84,000	14,461	578,536
Arthritis Foundation	9,844	10,351	72,250	389,117	104,619	175,152	761,333
Amnesty International	0	11,930	0	175,058	300,000	30,500	517,488
CMRF	80,000	50,000	4,000	65,000	102,000	75,000	376,000
Women's Aid	0	0	219,497	0	19,023	89,695	328,215
Irish Hospice Foundation	0	0	0	4,900	129,513	148,800	283,213
Barnardos	24,709	22,989	141,948	22,558	2,539	116,673	331,416
Oxfam	7,953	44,389	31,940	60,595	30,335	63,822	239,034
Sight Savers	9,552	0	1,154	1,186	3,248	54,270	69,410
Multiple Sclerosis Soc. of Ire.	0	0	0	0	0	60,000	60,000
Merchants Quay Project	0	0	48,998	9,466	0	0	58,464
Age Action	0	0	8,700	5,500	0	0	14,200
Rape Crisis Centre	5,080	0	0	0	0	0	5,080
Barretstown	0	0	0	0	2,540	1,500	4,040
<b>TOTAL LEGACY INCOME</b>	<b>5,392,420</b>	<b>5,946,827</b>	<b>9,129,141</b>	<b>8,966,983</b>	<b>11,006,907</b>	<b>11,742,793</b>	<b>52,185,071</b>

**TABLE 2: LEGACY INCOME 1999-2004 – TOTAL LEGACY INCOME BY SECTOR**

<b>ORGANISATION</b>	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>TOTAL</b>
<b>COMMUNITY &amp; ANTI-POVERTY</b>							
Society of St.Vincent De Paul	3,244,658	2,654,346	3,682,911	4,669,909	5,012,381	5,463,663	24,727,868
Focus Ireland	100,310	16,891	228,874	134,000	84,000	14,461	578,536
<b>TOTAL</b>	<b>3,344,968</b>	<b>2,671,237</b>	<b>3,911,785</b>	<b>4,803,909</b>	<b>5,096,381</b>	<b>5,478,124</b>	<b>25,306,404</b>
<b>INTERNATIONAL AID &amp; HUMAN RIGHTS</b>							
Trócaire	673,415	1,324,074	1,747,748	743,050	1,679,230	2,485,194	8,652,711
Concern	883,300	673,092	1,264,972	1,663,944	1,690,122	1,141,648	7,317,078
Goal	160,416	786,108	437,396	510,728	841,037	808,181	3,543,866
The Irish Red Cross	95,993	53,236	881,114	242,519	636,477	593,319	2,502,658
Amnesty International	0	11,930	0	175,058	300,000	30,500	517,488
Oxfam	7,953	44,389	31,940	60,595	30,335	63,822	239,034
Sight Savers	9,552	0	1,154	1,186	3,248	54,270	69,410
<b>TOTAL</b>	<b>1,830,629</b>	<b>2,892,829</b>	<b>4,364,324</b>	<b>3,397,080</b>	<b>5,180,449</b>	<b>5,176,934</b>	<b>22,842,245</b>
<b>HEALTH &amp; CHILDREN</b>							
The Irish Heart Foundation	97,190	299,421	357,639	269,453	369,843	420,915	1,965,424
Arthritis foundation	9,844	10,351	72,250	389,117	104,619	175,152	761,333
CMRF	80,000	50,000	4,000	65,000	102,000	75,000	376,000
The Hospice Foundation	0	0	0	4,900	129,513	148,800	283,213
Barnardos	24,709	22,989	141,948	22,558	2,539	116,673	331,416
Multiple Sclerosis Soc. of Ire.	0	0	0	0	0	60,000	60,000
Merchants Quay Project	0	0	48,998	9,466	0	0	58,464
Barretstown	0	0	0	0	2,540	1,500	4,040
<b>TOTAL</b>	<b>211,743</b>	<b>382,761</b>	<b>624,835</b>	<b>760,494</b>	<b>711,054</b>	<b>998,040</b>	<b>3,839,890</b>
<b>RIGHTS</b>							
Age Action	0	0	8,700	5,500	0	0	14,200
Rape Crisis Centre	5,080	0	0	0		0	5,080
Womens Aid	0	0	219,497	0	19,023	89,695	328,215
<b>TOTAL</b>	<b>5,080</b>	<b>0</b>	<b>228,197</b>	<b>5,500</b>	<b>19,023</b>	<b>89,695</b>	<b>347,495</b>

**TABLE 3: LEGACY INCOME AS % OF TOTAL VOLUNTARY INCOM**

<b>ORGANISATION</b>	<b>VOLUNTARY INCOME</b>	<b>LEGACY INCOME</b>	<b>%</b>
Arthritis Foundation	1,073,142	669,097	62
SVP	72,346,260	15,145,923	21
The Irish Red Cross	8,959,980	1,472,315	16
Amnesty International	4,602,042	505,558	11
Goal	19,901,485	2,159,946	11
The Irish Heart Foundation	6,400,000	639,296	10
The Hospice Foundation	3,587,194	283,213	8
Trócaire	72,526,536	4,967,754	7
Concern	86,419,329	4,495,714	5
Oxfam	4,253,281	154,751	4
Focus Ireland	7,135,000	148,461	2
Barnados	11,336,407	141,770	1.25
Women's Aid	914,091	108,718	12
Sightsavers	7,641,242	58,703	0.8
Multiple Sclerosis	7,297,134	60,000	0.8
Barretstown	10,983,000	4,040	0.03
<b>TOTAL</b>	<b>325,376,123</b>	<b>31,015,259</b>	<b>9.4</b>

**TABLE 4: NUMBER OF BEQUESTS 1999-2004**

ORGANISATION	NUMBER OF BEQUESTS						TOTAL
	1999	2000	2001	2002	2003	2004	
Trócaire	65	101	96	84	104	123	573
Concern	94	75	91	100	116	85	561
Arthristis Foundation	37	43	44	39	40	27	230
Goal	21	32	27	35	38	27	180
Oxfam	6	8	10	18	25	13	80
Red Cross	8	11	9	11	11	12	62
Sight Savers	3	0	2	2	4	11	22
Barnardos	2	6	6	4	1	9	28
The Irish Hospice	0	0	0	1	4	7	12
Amnesty	0	1	0	6	1	1	9
Merchants Quay Project	0	0	2	2	0	0	4
Age Action	0	0	1	1	0	0	2
Barretstown	0	0	0	0	1	1	2
<b>TOTAL</b>	<b>236</b>	<b>277</b>	<b>288</b>	<b>303</b>	<b>345</b>	<b>316</b>	<b>1765</b>
Change from Base Year		54	62	79	120	153	
Change Year on Year		54	8	17	41	33	

**TABLE 5: AVERAGE BEQUEST VALUE 1999-2004**

<b>ORGANISATION</b>	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>AVERAGE</b>
The Irish Red Cross	11,999	4,840	97,901	22,047	57,862	49,443	40,682
Goal	7,639	24,566	16,200	14,592	22,133	29,933	19,177
Trocaire	10,360	13,110	18,206	8,739	15,694	20,205	14,386
Concern	9,397	8,975	13,900	16,639	14,570	13,431	12,819
Barnardos	12,354	3,831	23,658	5,640	2,539	12,964	10,164
Arthritis foundation	266	240		9,977	2,615	6,487	3,264
Oxfam	1325	5,549	3,194	3,366	1,213	4,909	3,259
Sight Savers	3,184	0	577	593	812	4,933	1,683
SVP						61,389	

In order to calculate the average amount of a bequest we took the total legacy income reported for each year and divided it by the number of bequests.