

Legacy Insights - Ireland

Overview 2015 - 2020



March 2022

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1. Introduction

Legacy income is **growing** overall in Ireland. It is probably the fastest growing source of voluntary income for charities in Ireland today. For many countries, legacy income is the only growing fundraising source.

The information in this report is based on **new research**. The first 2021 report in March 2021 was borne of a frustration at the lack of data in Ireland. That report had limitations but it for the first time provided a more definitive insight into and overview of legacy income.

Additional data has since been uncovered for the years previously reviewed as well as new data for 2020. 2020 saw a small decline and a drop in the number of known charities receiving bequests. This may be attributed to delays in the probate / legal process in some areas as a result of COVID. The total would have been lower but for a small number of large legacies to organisations which do well in some years and not in others from legacies. Campaign Solutions is quietly confident that the 2021 report will show an increase in legacy income to charities.

New in this report: A more comprehensive assessment of the overall market is also now included. This is on foot of additional data being available, a small snapshot of data from the Dublin Probate office. A sector-by-sector breakdown based on the Benefacts categorisations is also provided for 2020. This will be expanded on in future reports.

There are a number of **provisos** associated with the research and these are highlighted in the Methodology and Notes section. Overall, there is huge potential in Ireland. Given demographic changes and increased promotion by charities themselves and the My Legacy consortium of charities, it is expected that more people will leave bequest(s) in the future. As wealth increases, this could translate into people leaving more – but more marketing of legacies is needed to enable the potential to become reality.

The report was undertaken pro bono by Campaign Solutions. It is provided at no fee to charities. The work has inspired additional legacy research and a growing bank of information is now available.

Welcome

Welcome to the second annual Legacy Insights Ireland overview report. It is planned to continue this into an annual tracker and to make annual improvements. Legacies are clearly growing and are an area that Campaign Solutions is passionate about. Enjoy the read.



2. About Campaign Solutions

Campaign Solutions is a fundraising strategy, major gifts, legacy and prospect research consultancy. It has worked with some of the country's leading not for profits in the areas of health, culture, second and third level education, development aid and more. Campaign Solutions is run by Niall O'Sullivan, author of this report. He has over 20 years' experience working in fundraising and philanthropy in Ireland and overseas. He is a board member of MyLegacy.

Campaign Solutions in 2021 also established the Legacy Insights research consortium (See Appendix 2).

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3. Research Overview

- The report has confirmed / verified legacy income of **€318,864,874** in the six years 2015 - 2020. Of this amount, €26,732,718 represents new data for the years 2015 – 2019, with over €8.6m for 2018 alone (i.e. this had not been included in the 2021 report).
- It is estimated that, having reviewed the information gaps, the **2020 total** legacy income for the Republic of Ireland was **€61.13m**.
- Verified income increased from **€34.38m in 2015 to €54.63m in 2020**. That's an **increase of almost 60%!**
- 2020 saw a small fall however of 1.4% compared to 2019.
- 116 charities had confirmed bequest income as per the March 2021 report covering 2015 - 2019. The number now identified is **177**, an increase of 61 (over 50%). With a small number of very notable exceptions, those added had relatively lower levels of legacy income and some had bequests in only one or two of the years covered. Overall, the number of charities actually getting bequests is still tiny.
- 2017 remains the standout year. **Elizabeth O'Kelly** almost doubled the legacy income in 2017 when she left €30m to five charities.
- Some sectors have minimal legacy income, notably **arts / culture organisations**. This has led to Campaign Solutions undertaking a bespoke piece of legacy research in late 2021 to 'dig deeper' via the Arts Council's Raise programme.
- Many people would argue that climate change / our **environment** is the biggest issue facing mankind. Charities in this sector receive a tiny amount of the total legacy income.
- The **top 10** charities received over 50% of all recorded legacy income in each year.
- The **lowest** amount recorded by a single charity - other than the many hundreds receiving zero - was €150, but it is a start!
- The **highest** annual income for any one organisation recorded was just over €9m – which happened in 2017.
- More charities are now securing legacies. Furthermore, of those who had legacy income in both 2015 and 2020, slightly more had a higher income in 2020.
- More organisations are securing **€1m** or more in legacy income. 2017 saw 16 charities do so, while 14 achieved this milestone in 2020.

4. Detailed Findings

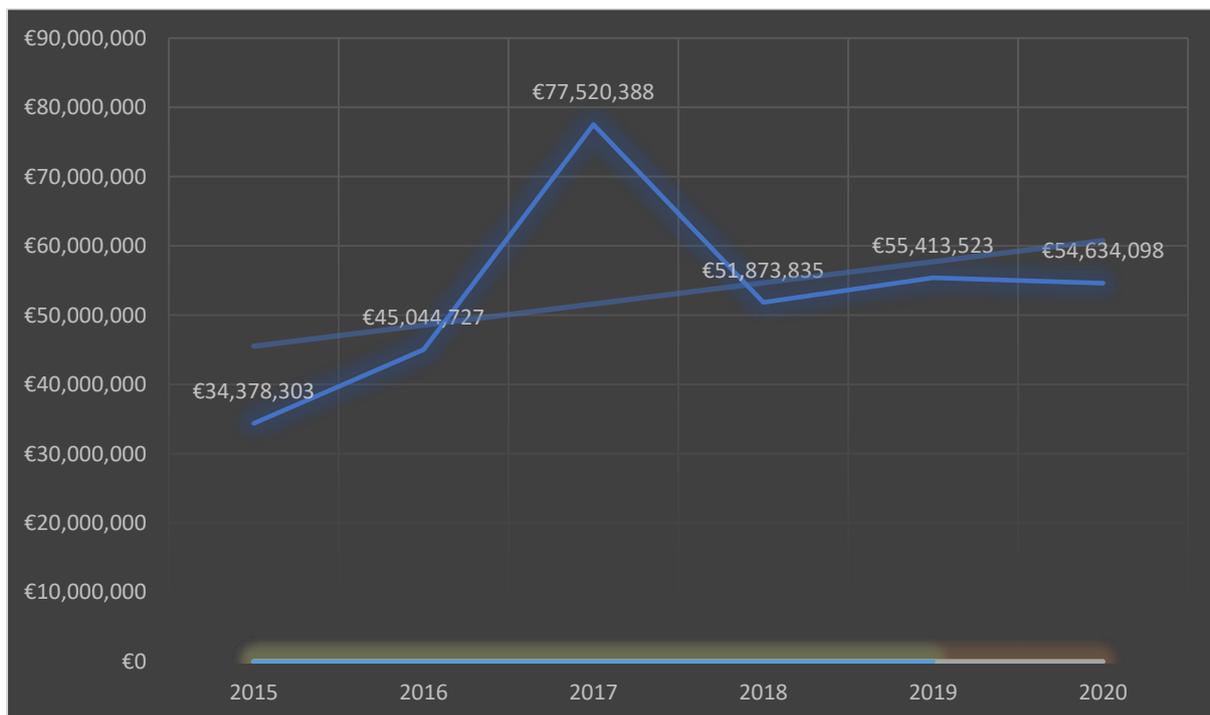
4.1 Market Value and Trends

Verified income has risen from €34.4m to €54.6m in the six years studied. This is a near 60% increase.

Elizabeth O’Kelly in 2017 ensured a clear spike for 2017 but the upward trend (second blue line) overall is very evident. It is unlikely that any other voluntary income source has increased so much – and more importantly - has such clear potential to grow even more.

In a small number of charities, data is only available for more recent years, but not earlier – as a result 2015 and to a lesser degree some latter years are understatements, but they are the best figures achievable as of now.

Table 1 – Verified Legacy Income



The total value is higher as certain charities have not yet provided data. There are 30 - 40 organisations where the author is confident there is legacy income in some or all of the years covered in this report. These organisations include diocese, universities, charities and others. Looking at 2020, a conservative estimate of their combined legacy income is €3m. The greatest unknown is re dioceses.

Parishes in their own right are considerable beneficiaries of bequests from people in Ireland. There are 15 Probate offices across the Republic of Ireland and based on a sample review from the Dublin Probate office over a five-month period of 2021, a figure of €1.5m has been estimated for total income from legacies for parishes in Ireland. This may be conservative. Perhaps people ‘outside the Pale’ are leaving more to their local parishes. This figure is based on cash / pecuniary bequests only – which appears to be the predominant form of legacy giving to parishes. The Dublin Probate Office covers counties Dublin, Meath, Kildare and Wicklow (equates to 40% of total Irish population-CSO 2016) but other counties can also be represented in the data – most notably, Co Donegal. An assumption has been made that 2021 Probate office data for parishes would be broadly similar to 2020 for the purposes of this reports 2020 total estimate. A more detailed research document will, it is hoped, be prepared on this research in time.

It is assumed there is further income also from other charities.

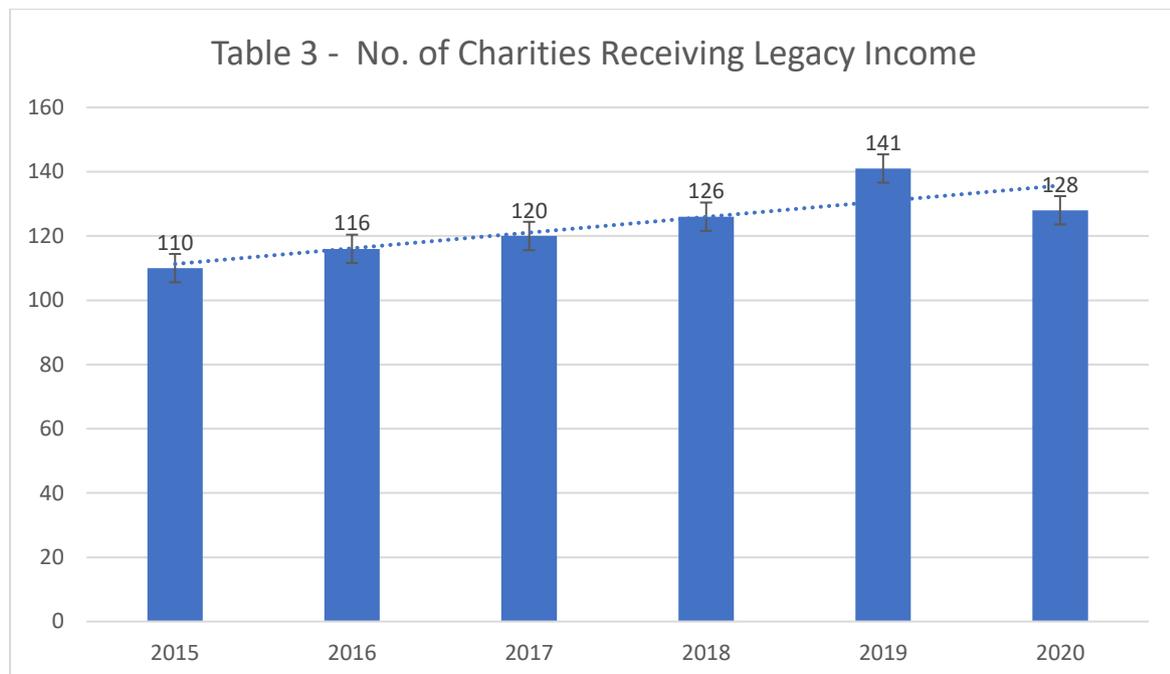
**Total legacy income for Ireland is estimated to be
€61.13 million**



Note: Only a 2020 complete estimate is covered in this report. In other years there is more missing information so more than €6.5m would need to be added to generate an accurate estimate for each year. More detailed work may be undertaken in future reports.

The **average** amount secured per charity has increased – to €426,829 in 2020 from €312,530. As there is such a disparity between those higher up and lower down, while interesting, it may not be the most pertinent finding. Averages are less relevant to many, especially those who are still only receiving periodic bequests - but there is an upward trend.

4.2 More Charities are Receiving Bequests



177 charities have now been identified with confirmed bequests. Numbers rose from 110 in 2015 to a high of 141 in 2019. There are more - and hopefully this will be reflected in the 2023 report.

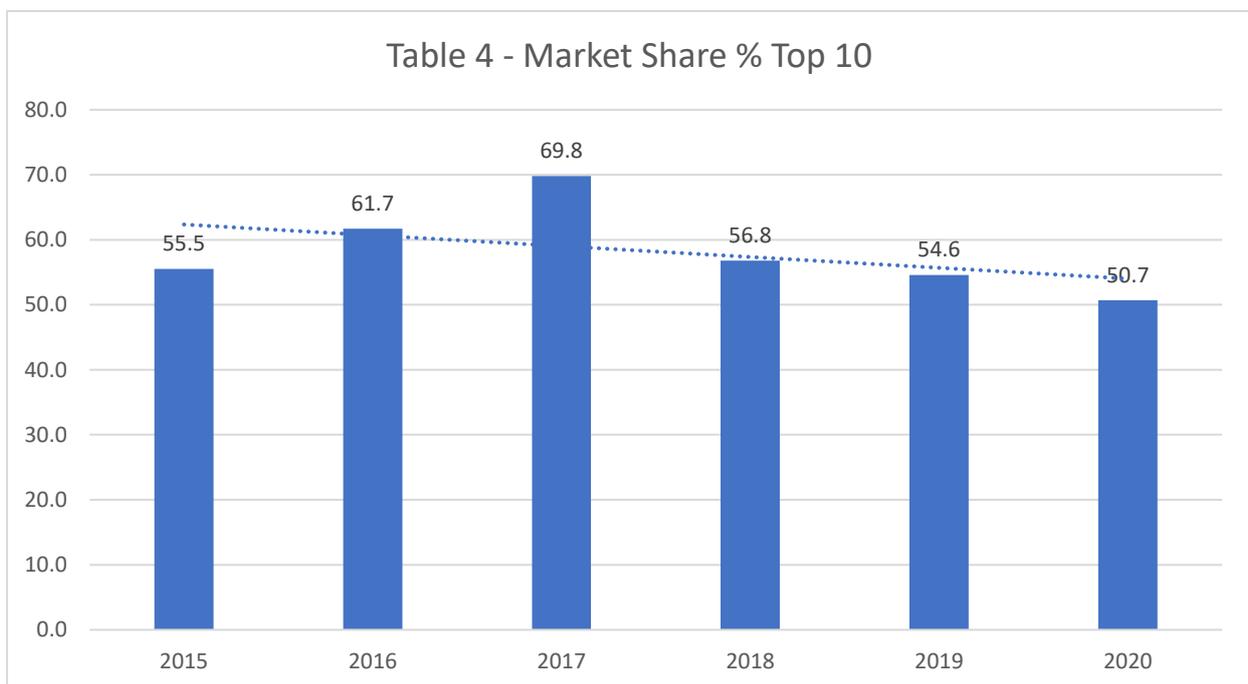
As per Benefacts 2020 report, Ireland's non-profit sector had 32,841 organisations. It is also known that in 2016 only c. 1,700 entities out of the then 8,000 registered charities in Ireland availed of the tax relief scheme for donations over €250. Source: “The Impact of the 2013 Change in The Tax Treatment of Charitable Donations” – Philanthropy Ireland 2019. If the vast majority of charities are not securing donations

from individuals (or at least donations at the €250+ level), they are probably less likely to be seeking or receiving bequests.

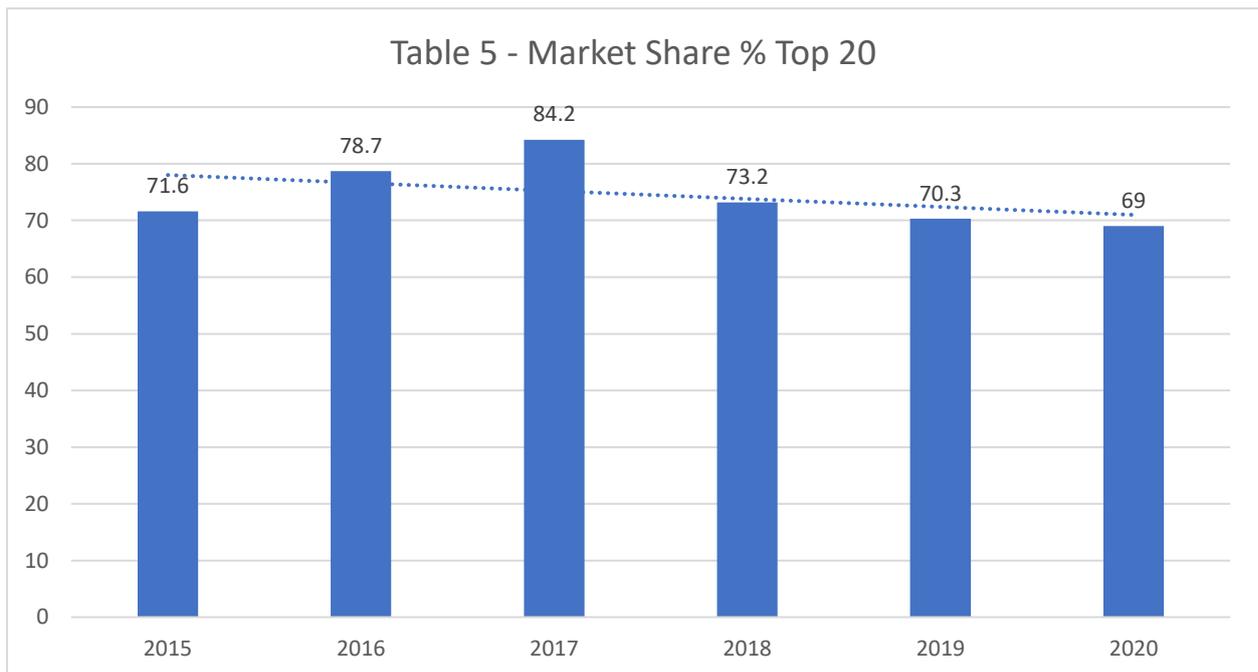
In future reports, as a result of new probate procedures, it is hoped that we will generate more information and richer data via the CRA on charitable bequests.

4.3 Market Concentration

The bulk of legacy monies are going to a relatively small number of charities. As per the tables below, the figures are remarkably skewed, but not a surprise. Many charities do not yet even have a legacy section on their website. The old fundraising maxim – ‘if you don’t ask, you don’t get’ can perhaps be amended for legacy promotion – ‘if you don’t tell your story and let people know you are open for business, why should / would they leave a legacy to you?’ The UK has seen an explosion of smaller charities receiving legacy income and there are green shoots in that respect in Ireland now too. The top 10 are securing half of the known legacy income, a considerable, but reducing combined market share. But for two very significant bequests to two particular organisations, the figure would have moved under 50% for the Top 10 for the first time.



Looking more widely to the Top 20 organisations, we see the Top 20 dipping under 70% combined for the first time. 2017 is something of an outlier in both years due to the Elizabeth O’Kelly bequests.



4.4 More Millions

There has been a significant increase in the numbers of charities exceeding €1m in their total legacy income and indeed more achieving €500k+. For some charities, a single bequest – typically residuary involving a property – can be responsible for reaching the €500k+ category in a given year. 31 charities now have legacy income of over €500k, almost half of which are over €1m. Making the Top 10 is no longer a formality if you reach or exceed €1m. €1.3m was required in 2020 and to make the Top 20 a charity needed to secure over €750k legacy income.

Table 6 – Analysis of Charities with Highest Legacy Incomes

Year	2015	2016	2017	2018	2019	2020
# over €1m	7	12	16	12	11	14
# €500k - €999k	9	8	8	13	14	17
Total €500k+	16	20	24	25	25	31

There has been a doubling in the number securing €500k - €999k. There could be a number of factors to explain this including increased promotion, rising property values and more.

4.5 The Ups and Downs of Legacy Income

Unless a charity has had a very strong proactive legacy programme in place for at least five years it is difficult to predict future income. This explains some of the following findings from comparisons between 2015 and 2020.

- 15 charities that received legacies in 2015 had none in 2020 – they ranged from having in 2015 - very small legacy income to over €250k in two cases.
- 9 charities which may have or definitely had legacy income in 2015, but figures are not available, had verified legacy income in 2020 – ranging from €6k to over €600k.
- 21 charities with no known legacy income in 2015 received bequests in 2020. One had over €2m income, another close to €1m and two more over €500k.
- 48 charities with verified legacy income from 2015 had a higher total in 2020. This included some spectacular growth stories.
- 41 charities with verified legacy income from 2015 had a lower total in 2020. The falls were less pronounced than the growth figures.

5. Sector Breakdown

A sector breakdown is provided for 2020. This will hopefully be expanded to previous and subsequent years in future reports. Benefacts classifications are used. These are imperfect but allow for consistency when looking at this report in the context of other fundraising reports for Ireland.

Additional comment is provided for some sectors to better explain the results.

Table 7 - Charity Sectors	€	Note	% Share	Rank
Social Services Homelessness services	€11,040,219	9	20.21	1
International International development	€10,274,564	2	18.81	2
Health Health services and health promotion	€8,815,922		16.14	3
Advancement of education	€5,968,952	1	10.93	4
Social Services Services for people with disabilities	€2,521,587		4.62	5
Health Hospitals	€2,198,173		4.02	6
Health Hospices	€2,076,573	5	3.8	7
Social Services Emergency relief services	€1,922,489		3.52	8
Religion Religious associations	€1,759,726		3.22	9
Environment Animal welfare	€1,758,025	3	3.22	10
Philanthropy, Voluntarism Fund-raising	€1,537,196	6	2.81	11
Social Services Services for older people	€1,113,605		2.04	12
Education, Research Research	€991,079		1.81	13
Religion Places of worship	€828,342	8	1.52	14
Social Services Family support services	€319,000		0.58	15
Health Residential care centres	€309,413		0.57	16
Philanthropy, Voluntarism Philanthropy	€265,000	7	0.49	17
Advocacy, Law, Politics Civil and human rights	€212,859		0.39	18
Environment Environmental enhancement	€183,482	4	0.34	19
Religion Diocesan, parishes	€169,342	8	0.31	20
Local Development, Housing Social housing	€129,337		0.24	21
Professional, Vocational Professional or sector	€62,253		0.11	22
Health Mental health services	€52,174		0.1	23
Social Services Youth services	€49,825		0.09	24
Education, Research Third-level education	€37,033		0.07	25
Advocacy, Law, Politics Advocacy	€14,078		0.03	26
Local Development, Housing Sheltered housing	€11,850		0.02	27
Law Advocacy and Politics	€11,000		0.02	28
Education, Research Education support	€1,000		0	29

Notes to Above

1. Advancement of education covers universities and their combined income can vary significantly from year to year.
2. International development is consistently stronger in legacies than other sectors.
3. Animal charities have a small share in Ireland, despite what people may think, but are now among the most proactive in seeking legacies.
4. At 0.34%, environmental charities are largely forgotten by Irish legators, just two charities in that space are known to have received bequests in 2020.
5. The figure for hospices is a little misleading as some additional fundraising is also included in the 'Philanthropy, Voluntarism | Fund-raising' category and a small number of hospices have not provided data thusfar.
6. Covers quite an array of largely health focussed charities
7. Philanthropy organisations are unsupported by legacies in modern Ireland, though see additional note 7a below for a wider context.
8. As mentioned previously, there is a dearth of publicly available information on religious / faith-based bodies and this is reflected in this table. The table also does not reflect the fact that some organisations in other categories have a religious affiliation.
9. It is likely that homelessness charities have increased their market share in the last decade given an ongoing context of housing shortages and crises in Ireland.

7a. Benefacts in 2021 identified 164 not for profit organisations which they classed as philanthropic. Half of these are private charitable trusts, "many of which were established using a legacy or bequest". Source: Benefacts (2021), "Institutional Philanthropy in Ireland". It is believed that only a small number were established in recent decades.

Overall, the figures above point to quite a conservative approach to legacy giving in Ireland.

6. Data Collection

115 charities have provided a breakdown of legacy income in their accounts in at least one year. It can be inconsistent, but generally in more recent years there has been an improvement in the separation and presentation of legacy figures in accounts.

A relatively small number of charities make a feature of their legacy income in the annual reports – an opportunity missed for the majority.

7. Potential for Growth?

7.1 Wealth Transfers

There would appear to be a big opportunity for charities. Figures from The Community Foundation for Ireland's 'Legacies for Good, Wealth Transfer and the Potential for Philanthropy in Ireland' report suggested a minimum annual wealth transfer of €5.7billion in 2017. The Probate Offices have first-hand sight of this annual transfer and in 2022 suggested it could be as much as €8billion - €10billion. Most expect the annual wealth transfer figure will rise in future years.

Based on the €5.7billion wealth transfer figure for 2015, the percentage left to charity in 2017 was approximately 1.28% (and noting this was a record legacy year). Applying the same (conservative) figure for 2015, the percentage charities received was just 0.6%. Applying the estimated total figure of €61.34m for 2020, the figure increases to just over 1%. If the level of wealth transfer has increased (as was expected and as per Probate), the figure remains well under 1%.

Table 8 – Legacy Income as a % of Wealth Transfers

€ Transferred in 2017	€ Given in Bequests to Charities
€5,700,000,000	€77,520,388
Legacy % of Total 2017 Transfer	1.36%
Legacy % of Total 2015 Transfer	0.6%
Legacy % of Total 2020 Transfer	1.07%

It is very possible that more people will leave bequests, simply by virtue of changing demographics, BUT, charities must prepare for this situation.

The following table has been amended slightly from the first Legacy Insights Ireland Overview 2015 – 2019. It shows that if Irish people, pro rata, left bequests at the same rates as their NZ or UK counterparts, legacy income would be €117m if we gave as the same rate as New Zealanders and over €200m if at UK levels.

Table 9 – Pro Rata Potential

Country	Income	Year	Percentage
Ireland	€55.1m	2019	-
New Zealand	€117m	2018	47.10%
UK	€217m	2019	24.93%

7.2 Demographics

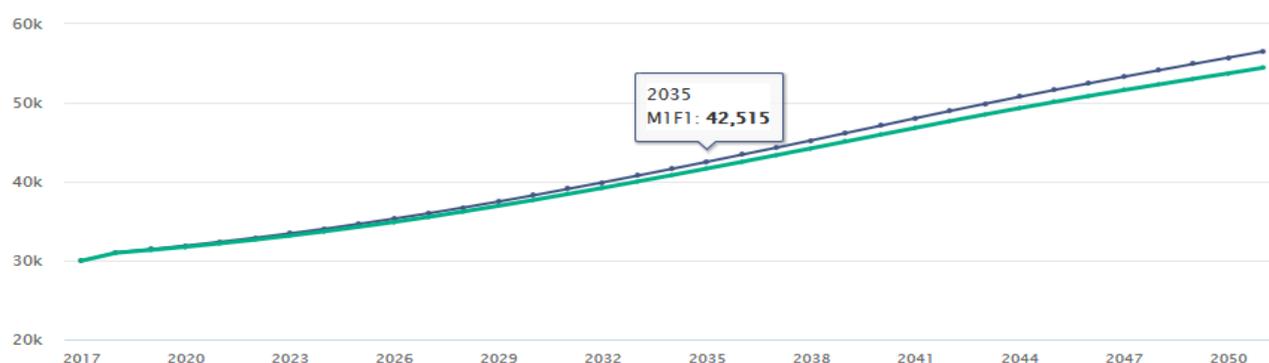
There is an ageing population in Ireland. The following table from the CSO is based on predictions from a number of economists regarding the total number of people expected to pass away in the years up to 2051. This suggests a near doubling of current rates from 29,500 to closer to 55,000 per annum.

Table 10 – Ireland Projected Death Rates

Deaths

The average annual numbers of deaths are projected to increase steadily under all scenarios from 29,500 in 2016 to between 54,400 and 56,500 by 2051 depending on the scenario chosen. Figure 2.5 graphs the projected deaths for the most optimistic and most pessimistic scenarios, with the other scenarios falling between these.

Figure 2.5 Deaths by year for selected assumptions, 2017 – 2051



7.3 The Impact of Faith

As referenced elsewhere in the report, data for faith-based groups is unavailable in many cases. A separate report, it is hoped, will be undertaken which could help shed light on this current partial gap in the research.

Faith is a factor in legacy giving – not just to faith-based organisations but other well-known charity brands in the housing, hospice and other sectors. In some cases religious orders are or were involved directly, in others key figureheads are from a faith background. While demographics indicate growth, religious participation in Irish society is dropping. Without more proactive promotion by charities potentially fewer people pro rata could leave bequests in the future as a result.

8. Legacy Share of Fundraising Income in Ireland

The Giving Ireland Report 2021 reported that total fundraising income for charities in Ireland in 2019 was €1.78 billion.

Based on verified legacy income for 2019, this suggests the percentage from legacy was 3.1%. If the estimated 2020 figure of €61.34m is applied, the figure is still just 3.4%.

9. International Comparisons

The following shows comparisons with a number of countries. For the most part Ireland is lagging behind - and by some distance.

Table 11 – International Legacy Data

Country	Year	Percentage of Fundraised Income	Totals
UK	2019	19%	€2,984,418,000
France	2019	11%	€1,000,000,000
Switzerland	2019	11%	€276,946,630
Belgium	2018	10%	€205,000,000
USA	2019	10%	\$43.21 billion
Netherlands	2019	7.9%	€323,000,000
Spain	2019	4.9%	€144,526,000
New Zealand	2018	4%	€117,000,000
Ireland	2020	3.4%	€61,134,098
Germany	2019	1.8%	€300,000,000

Sources: NZ Support Report, 2020; NCVO Civil Society Almanac 2021. The figures for France, Spain, Netherlands and Switzerland are sourced from a 2021 report prepared by Philanthropy Services AG, Switzerland for StiftungSchweiz. The percentage figures are amended to remove lottery income for Spain, Netherlands and Switzerland data to allow for better comparison with other countries. USA data is from the Giving USA 2020 report.

Note: The above in some cases are best estimates. Indeed, in the case of e.g. Netherlands, Legacy Foresight there believes this to be an understatement - and provided data separately to Campaign Solutions that 23.8 % of total fundraising income for the top 100 Dutch charities is from legacy. The Belgian figure (Source EFA 2020) covers just 121 non-profits so true figure is also likely to be far higher.

Apart from the USA, each known total has been included as €.

10. Methodology and Notes re Research

A mix of desk research and a significant amount of direct contact with charities was undertaken.

- Years covered 2015 – 2020 inclusive.
- Accounts were accessed from charity websites directly, the CRA website and from Benefacts (which closed in February 2022).
- Annual reports from charity websites were also a source of information.
- Data provided directly by charities up to March 16, 2022 is included.
- This is not a commissioned report. A small number of charities that declined to provide data but may in the future if this changes.
- 2020 is missing data from a small number of late filing charities. Their data will be captured and included in the 2022 report.
- The accounts of 1,500 – 2,000 charities were reviewed. Where there was a belief there could be legacy income, those charities were contacted directly. Many replied, sometimes simply to confirm that legacy income was zero.
- Others were excluded as accounts were abridged.
- In other cases, especially older organisations, accounts were not available, e.g. those with a trust structure. Accounts of trusts are generally not in the public domain and legacies to them are less likely to be captured as a result. This is regrettable.
- Some charities were unable to provide information for earlier years, most notably 2015, but in some cases up to 2019. Internal recording systems are improving. This research work has helped charities identify significant information gaps in their own data.
- The presentation / inclusion of legacies in audited accounts has improved year on year with more charities including legacies as a line item in the main accounts or, more commonly, in the notes section. Numbers including legacy information in their accounts is increasing but the vast majority do not. SORP is not mandatory in Ireland which is a key reason for this.
- It was good to see that more universities participated in the 2022 report. The hope and expectation is that more again will in future years. The new technological universities were not approached, but will be at some stage, in the future. They are not, as yet, thought to be securing legacy income.
- Church and diocesan accounts were reviewed and included where possible. Many dioceses still don't have accounts available. This issue has been highlighted in the media and by The Association of Catholic Priests which in its most recent report showed that just 10 of 26 dioceses had their accounts on their website. Only

some of those who do so, separate out legacy income. More data should hopefully be available from this sector in the future.

- The church has traditionally been a primary option for bequests, initial research with the Dublin Probate Office has been undertaken. This has given a sense of the scale of legacy giving – to local parishes in particular – and has enabled a better estimate of the overall scale of legacy giving to be prepared. Far more work with Probate offices and / or the CRA is required however.
- Some longer established fee-paying schools are known to have received bequests in years past but data is not yet available from this cohort, except to confirm legacy income as zero in some cases. School accounts are not available online.
- There are a small number of organisations that do not, in their accounts, provide a breakdown between Northern Ireland and Republic of Ireland income and a small number that do not provide a breakdown from UK/RoI income. Thank you to those who when contacted directly provided the breakdown when requested.
- As many charity offices were closed in 2020 in the first research phase and still in 2021 and 2022 due to the pandemic, many staff were working from home. It was more difficult as a result in some cases to reach people, and for those contacted to access the required data.
- Some organisations failed to engage in both years of the research alas. There is still a reticence to share data and to even talk about legacy among some. There appears to be a lack of professionalism in some also.
- There is still a lack of usable information re legacies from the CRA, but it is hoped, indeed expected, that this will improve as probate processes move online. Partly as a result of the 2021 Legacy Insights Ireland report and in part because of the work of My Legacy this issue was highlighted in the Indecon report on philanthropy which went to government in early 2021. A recommendation to improve legacy reporting was included as a result. It is believed that the CRA are seeking to address this information gap but there are a number of challenges in so doing.
- Direct contact was made with many charities – either to complete some missing years or to get information where none re legacies was provided in the accounts etc. Thank you to the over 60 charities who provided new or additional information as a result. A small number of others will do so, but had not done so at the time of writing. As a result, it is expected that this report will be updated with new 'historical' legacy data as it emerges in future months / years.
- The author is satisfied that the vast bulk of the key players from Irish charities have been included.

- The process continues to highlight the difficulty many fundraisers have in getting basic data or running a simple legacy income report. This needs to be addressed, especially for those seeking to be more proactive in this space.
- In certain cases, information on legacy income was available in annual reports or accounts some years, but not consistently in all. This can happen due to changes of leadership or other factors. Some of these organisations unfortunately did not provide legacy income information for the missing years.
- A significant minority of charities would only provide information on the basis that their charity not be identified. This is a reflection of how cautious / nervous many boards and indeed some fundraisers are about this space. It is hoped that this reticence will be less apparent in future years.
- Note: the terms legacy and bequest are used interchangeably throughout this report.
- In conclusion, a big thank you to all who helped make this report possible.

Appendix 1 – Other Legacy Insights reports

A growing bank of data is emerging. The following have been published / will be published:

- Legacy Insights Ireland Overview 2015 – 2019, published in 2021
- Legacy Insights Ireland Overview 2015 – 2020, published in 2022 (this report)
- Legacy Insights Ireland Consortium Tracker – 2019 data, published in 2022 (more detail on bequest sizes and more)
- Legacy Insights for the Arts Sector in Ireland, published in 2022
- Legacy Insights Probate Review 2021, 2022*

These are available on request from info@campaignsolutions.ie

*To be published later in 2022.

Appendix 2 – Introduction to Legacy Insights Research Service

The Legacy Insights research consortium is made up of over 20 charities that are ambitious in the legacy space. It is relevant to those already securing legacy income, even sporadic or low levels of legacy income. It is a fee-based research service with prices and further detail outlined in the link provided below. It is modelled to some degree on the Legacy Foresight, a research initiative established in the UK and now operating in other countries also.

The charities provide data to Campaign Solutions and this is collated and is enabling deeper insights to emerge. It is intended that much of the new information be in the public domain. The more charities supplying data the better the quality the research outcomes will be. An annual tracker of charities legacy data is undertaken.

More complete information is available at <http://campaignsolutions.ie/legacy-fundraising/>

Appendix 3: Other Services Provided by Campaign Solutions

Other Legacy Services

Additional information about the Campaign Solutions legacy consulting services can be found at <https://campaignsolutions.ie/legacy-consulting/> - this includes:

- Legacy training – one to one and small group
- Developing written, practical legacy strategies and plans
- Focus groups – to get the insights of your donors / supporters

Prospect Research and Other Fundraising Services

Additional information about the Campaign Solutions prospect research services can be found at <https://campaignsolutions.ie/prospect-research/>

- Prospect research for major gift fundraising
- Wealth screening
- Fundraising strategy
- Mentoring and coaching

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