Legacy Futures
Together with Smee & Ford

In-Memory Giving: Tribute Funds

In-Memory Insight 2025/26

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In-Memory Insight explores the size, shape and scope of in-memory giving in the UK. We collect hard evidence to inform in-memory fundraising strategies and convince senior management of the value of in-memory giving.

In-Memory Insight is a consortium research programme run by Legacy Futures, working closely with a learning circle of leading charities – over one hundred in the last fourteen years – who agree to pool their budgets, experiences and data together to help build evidence and insight.

Over the years the programme has explored numerous different themes including: The links between in-memory and legacy giving (2018/19); the role of groups in in-memory fundraising (2022/3); in-memory products (2023/4) and most recently in-memory giving through the lens of faith and culture (2024/5).

This year's programme will run from September 2025 to March 2026 and will deep dive into the world of tribute funds. This practical programme will explore the key opportunities and challenges surrounding tribute funds. It will explore the positioning of tribute funds, what it takes to make them successful and the different stakeholder relationships that impact on their success

Whether you're looking to establish a tribute fund programme or take your existing approach to the next level, this programme will equip you with the insights, tools and evidence to do so.

Introduction

Tribute funds are an increasingly important part of the in-memory fundraising landscape. They can be used in so many ways and offer something for everyone. For bereaved families and friends, they are happy places of remembrance and offer a personal, lasting way to honour loved ones while supporting causes that mattered to them. For charities, they present a unique opportunity to build deeper, more meaningful relationships with supporters and to grow sustainable income streams rooted in loyalty and emotional connection.

Despite their potential, tribute funds and their associated supporter journeys remain underdeveloped in many organisations. Fundraisers tell us they want clearer insight into what makes tribute funds succeed, how to identify and nurture supporters who could become long-term tribute fund holders, and how to align internal processes to support this specialist area of giving.

This year's In-Memory Insight programme is designed to meet that need. Through a combination of research, learning from best practice and benchmarking, we will explore how tribute funds are currently being used and how they could be developed further. We'll look at the dynamics between families, Funeral Directors and charities, and provide practical recommendations to help teams across your organisation engage more confidently with tribute funds.

Programme Scope for 2025/6

During this programme, we will focus on the following key areas:

- Explore how charities can steward tribute fund holders and encourage more engagement, to drive up their life cycle and lifetime value.
- Gain insight into supporters' attitudes towards and experiences of using tribute funds and how catalyst donors/ high value tribute fund holders have maximised their fund's potential.

- Gain a deeper understanding of how Funeral Directors use tribute funds and funeral notice pages and the dynamics between Funeral Director, next of kin and charity relationships.
- Explore internal engagement with tribute funds, looking at the challenges and opportunities tribute funds can bring to wider teams.
- Insights into what the future holds for tribute funds.

Proposed research approach

We will use a combination of different stages of research for this project:

Members Survey

Through the members survey we will get a snapshot of how charities are currently working with tribute funds. Learning Circle members will have the opportunity to share information on tribute fund programmes, what platforms are being used and how, tribute fund stewardship, internal engagement and marketing activity.

Supporter Research

We will carry out qualitative research to dig deeper and understand more about the experiences of tribute fund holders, the different ways they have used their tribute funds and what inspires them to keep using tributes to their fullest potential. We'll explore what awareness they had of tribute funds before setting one up, what their expectations were at the start and what their experience is of using their tribute fund as a meaningful way to support a charity in memory of their loved one.

Funeral Director and Expert Interviews

Speaking to a range of Funeral Directors (independent, national and regional), we will explore their attitudes to and experiences of tribute funds and funeral notice pages. Interviews will provide a deeper understanding of how Funeral Directors' are using these products, their needs, restrictions and how they manage the dynamics between families and charity relationships.

Speaking to third party platform providers to get a deeper understanding of how the tribute fund landscape is evolving and any new developments that will be introduced over the next few years.

Case Studies

This programme aims to showcase 4-6 case studies, exploring different aspects of charities' tribute fund programmes such as: stewardship, catalyst supporters, marketing, internal engagement and audience segmentation.

Performance benchmarking

We will update the performance benchmarking for the most recent year and as in last year's cycle, data collected will include:

- Resourcing of in-memory fundraising – i.e. staff numbers and fundraising budgets
- Income from:
  - Funeral collections and other 'unsolicited' in-memory donations
  - Money raised through tribute funds

- Money raised through specific in-memory campaigns such as Light Up A Life

New for this year, the outputs from the benchmarking will no longer be anonymised, with member organisation names included alongside their numbers in the dashboards created, rather than referring to organisations by sector and a letter. This development is being included to enhance the data and increase its usefulness for participants.

For existing members, this change requires us to share new programme schedules, to ensure the agreements around data sharing are up to date. (N.B. the spreadsheet outputs will remain as they were with each charity only seeing their data against the consortium averages).

Member charities will be provided with a data template (in excel) and a detailed briefing note to help them supply the right data. The Legacy Futures team will also be available via email for further guidance as necessary. We will be collecting data in November/December for the year up to end of September.

We recognise that not all charities will be able to supply all the data requested, either because they do not carry out this form of fundraising or because their systems are not set up to capture the information.

If you cannot supply some of the benchmarking data by the agreed deadline, you will still see the totals and averages for the group, but your own record will remain blank. If you cannot supply any (or a significant proportion) of the benchmark data by the agreed deadline, then your charity may be excluded from the analysis and you will not receive the benchmarking report or spreadsheet. In this case, the final arbiters of whether a charity can receive the benchmarking report and spreadsheet are the In-Memory Insight steering group.

Programme Outputs and Management

Outputs

The findings will be presented in a series of workshops, along with a benchmarking report and an executive summary report aimed at senior managers and colleagues from other teams. The conclusions will be developed into practical tips to support in-memory fundraisers in their day-to-day role.

Steering committee

As with all Legacy Futures programmes, we will work with a Steering Group of 4-6 in-memory fundraisers across a range of charities by size and sector. The Steering Group provides feedback and suggestions on the work as it develops, assures the quality of outputs on behalf of the consortium, and agrees on the final dissemination of findings. The group meets 'virtually' to agree the research specification, to discuss the emerging project conclusions and to approve the publicly-available sector briefing report.

We are currently looking to recruit new members to the Steering Group and to make the steering group as diverse and representative as possible. If you would like to join the group, please contact claire.truswell@legacyfutures.com or let her know when you confirm membership.

Timetable

September 2025

- Confirmed list of learning circle members circulated
- Invoices and new programme schedules issued
- Confirm benchmarking measures

October 2025

- Steering group meeting
- Identification of Funeral Directors to interview

- Members survey
- Compilation of in-memory benchmarking data by member charities

November/ December 2025

- First workshop
- Qualitative research to commence
- Analysis of in-memory benchmarking data

February 2026

- Second workshop (benchmarking)
- Final in-person workshop

March 2026

- Steering group meeting
- Executive summary and public briefing written and circulated

Learning Circle Membership and Costs

The cost per organisation for a 12-month cycle is based on your charity's average legacy income, from the previous 3 financial years 2022/23, 2023/24, 2024/254 drawn from Charity Commission data:

Over £5m: **£3,500**+VAT

Under £5m: **£2,500**+VAT

The deadline to sign up is **Monday 8th September 2025.**

Consultancy Offer: Online Content Review

Your in-memory content is often the first and only touchpoint for prospective supporters, so it must be engaging, inspiring, and aligned with their needs.

Awareness of tribute funds is generally low, with many people only encountering them after a bereavement. That makes it vital for charities to communicate clearly what tribute funds are, why they matter, and why someone might want to create one.

An Online Content Review offers a detailed assessment of your in-memory pages, using sector best practice and our own insights. This will include a detailed evaluation of how effectively you present your tribute fund offering and suggest practical ways to make it more compelling.

You'll receive a written report with clear, actionable recommendations to help your in-memory content perform at its best.

If you'd like to have an Online Content Review, please contact claire.truswell@legacyfutures.com.

Cost £2,060.00 + VAT

Legacy Futures

Legacy Futures, together with Smee & Ford is the UK's leading charity consultancy group that specialises in gifts in wills and in-memory giving. We provide the legacy giving data and analysis services that drive the UK market. And we are trusted partner to over 1,000 charities in the UK and worldwide, supporting them to harness the transformative power of legacy giving.

Legacy Futures

Legacy Futures is best known for research, analysis, and strategy. We work with charities large and small, UK and International, turning insight into strategy and action.

legacyfutures.com

Legacy Link

Legacy Link is the UK's largest team of estate administration consultants, helping to maximise the gifts left to a charity, and adding value at every step of the way.

legacyfutures.com/link

Smee&Ford

Smee & Ford provides timely and accurate legacy notification services for administration teams to optimise their services.

smeeandford.com