



The Commission on the Donor Experience

How **changing**
fundraising's culture
will make donors
feel great about
their giving and the
difference they make

The Commission on the Donor Experience



The Commission's full outputs can be downloaded from
<http://sofii.org/cde/the-commission-on-the-donor-experience>

A message from the chair of the Commission

Time to put donors at the heart of fundraising

In recent years reports of poor fundraising practice have eroded public trust, damaged the reputations of some charities, and unfairly cast a shadow over the charity sector as a whole. This has the potential to make a significant impact on donor giving – and thus the number of beneficiaries charities are able to help.



Yet donors want to give. They want to make a difference in the world, and charities remain the best route to achieving that. This what civil society is all about - and has been so for at least 1,000 years. Why would it fundamentally change now?

However, profound change has become essential. Charities need to give supporters genuine choices and put the donor experience at the heart of their fundraising. Let's stop thinking about what not to do, and start thinking about what to do better, ensuring that donors feel really great about their giving.

The aim of the Commission on the Donor Experience is to transform fundraising, and to do so by changing the culture to a truly consistent donor-based approach to raising money. Our report is based on evidence drawn from first hand insight of best practice. By identifying best practice and capturing examples, we will enable these to be shared and brought into common use. In doing this we have engaged the experience and wisdom of a great many of the very best practitioners in their field as well as the experience of donors themselves.

It has been a huge undertaking. For the first, time, the charity sector has come together in force to demonstrate its commitment to donors. Our report is richer in content than any previous study and as a result sets the stage for many years to come.

Making this real is not the task for fundraisers alone – everyone who works for and with charities has a responsibility to encourage a donor-based fundraising culture. The more people enjoy giving and are inspired to give, the more financial support will increase for charities in the UK, and the more good can be achieved.

Our recommendations give charities the tools and information they need to transform fundraising cultures, and put the donor at the heart of fundraising.

The Commission has now finished its work. We will rely on charities, their trustees, fundraisers and CEOs, as well as sector bodies, to make our recommendations happen - changing the way individual charities - and the sector as a whole - think about fundraising and about donors, with the emphasis now on the experience they receive from their involvement with us.

The voluntary sector's potential for fundraising is enormous. We hope that the suggestions and guidance we offer will maintain and enhance that for many years to come.

Sir Martyn Lewis CBE

5th July 2017

The 6Ps.	A blueprint for transforming fundraising. For good.
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Thank you	
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The 6Ps

The Commission on the Donor Experience's 28 projects, even in summary, are extensive and complex. Their combined outputs are encyclopedic. This document is intended as a concise overview of what the Commission aims to achieve and how the changes it recommends might be implemented.

The 6Ps: a blueprint for transforming fundraising. For good.



The six steps to change outlined here provide windows onto a vast body of work compiled through 2016 and early 2017 by upwards of a thousand individual volunteers for the Commission on the Donor Experience (CDE), from all corners of the voluntary sector, all with the aim of helping fundraisers put their supporters, not financial targets, at the heart of their fundraising strategies. The 6Ps are:

- **Purpose.**
- **Permanent change.**
- **Principles.**
- **Pillars of change.**
- **Promise to donors.**
- **Practical actions.**

Purpose: why change is overdue

Day in, day out, Britain's charities deliver life-changing, life-affirming, life-saving humanitarian, social, cultural and environmental work essential to the effective functioning of our society. For this they depend upon fundraising from a supportive, committed, generous public. That support, always consistently dependable, has for some been shaken, of late.

At its heart the Commission's philosophy is very simple. We believe fundraising charities will earn and enjoy the public trust, confidence and respect that's so vital for sustained giving only if they can firmly fix as their topmost priority the interests, convenience and positive experience of their supporters. If fundraising charities are to thrive they should transform, permanently, into the most supporter-focused business area of all. Signs that some charities have put meeting their short-term financial objectives ahead of concern for their donors have recently caused considerable negative publicity, damage and erosion of public trust.

In a genuine attempt to create more change in the world for their beneficiaries some charities have made the wrong choices. Over recent years the UK's voluntary sector has seen and suffered the consequences. A prevailing preoccupation with ever-increasing financial targets or a lack of closeness to the issues has led fundraisers, CEOs and trustee boards in many charities to focus on raising money in ways that are often unwelcome to donors and counter-productive to building the kind of relationships and programmes upon which long-term fundraising success depends. Of course targets are not wrong per se, but in their pursuit of ever-more and larger donations to reach ever-growing financial goals, many fundraising leaders have lost sight of what they could and should be doing to deliver, consistently, an exemplary experience for their donors and other supporters.

So deeply ingrained is the short-term, target-driven culture across fundraising in the UK that significant numbers of practicing fundraisers, their leaders and their agents still struggle to genuinely understand this. Our purpose therefore is nothing less than a culture change among fundraisers and within the organisations that employ them, particularly their leadership and senior management teams.

Given the above, we are proud that fundraisers individually and collectively are driven by such an evident and strong desire to remedy any shortcomings. This commitment can be seen by the more than 1,000 fundraisers and other professionals from all across the voluntary sector who have supported and engaged with the work of the Commission. While many areas need to improve, good practices are widespread. Backed by their trustee boards and senior leadership, we are confident that fundraisers across the sector can and will rise to this opportunity to change, to deliver consistently an exemplary experience for donors.

Permanent change: a new, bright future for the donor/cause relationship.

This is not about short term, cosmetic solutions. Instead the Commission on the Donor Experience is encouraging and preparing for a lasting culture change that will go deep into the roots and hearts of our organisations and their people, challenging conventional practices, attitudes and thinking to change fundraising practices permanently for the better. The changes we advocate will not just benefit donors directly but will also

The 6Ps: a blueprint for transforming fundraising. For good.

be better for charity staff and for the many millions who directly benefit when donors and fundraisers work at optimum together, for the good of all.

How change will happen

Change has to come from within. Fundraisers and their leaders have to make this happen, themselves. The Commission will provide detailed, supportive guidance but leaders have to lead by example, to be explicit about the changes they expect to see from colleagues all across the organisation. For the required change to come and to last, we are encouraging all UK charities to sign up to implementing this change.

People, their attitudes and how we inspire and support them are the key components of this change. Fundraising organisations from now on will need to be much more particular about whom they recruit and how they train and equip them to deliver an exemplary, inspirational, rewarding donor experience. Fundraisers in future won't just need to look and act different, they'll need to think, feel and be different and to be consistent in everything they write, say and do. Charity supporters everywhere will come to expect to see, feel and appreciate that difference, day in, day out.

Therefore we believe a profound, fundamental change is needed that, if it's to last, has to go deeply into the DNA of our sector so it can be transmitted, top to bottom, through every organisation that employs charity fundraisers. The donating public too has shown clearly that it wants change. We have listened and have tried to see fundraising through donors' eyes. What follows is the result.

Seven fundamental principles that underpin the change to come.

- 1. Anyone who gets a great experience when supporting a charity will, over their lifetime, give significantly more than someone who doesn't.** So, we believe, the donor-centred approach will lead not to reduced resources but to increased net income for good causes, at least in the medium to long-term*. If giving is seen to be a rewarding, enjoyable experience people will do more of it. If it isn't, people will soon stop.
- 2. Charities will be stronger if a donor-based approach becomes their norm.** Public trust and confidence are prerequisites of sustainable fundraising and charities enjoy high levels of it, mainly because of the good work they do. If donors are consistently listened to and given genuine choices and effective control of their relationships with the charities they support, so trust and confidence will increase too.
- 3. High standards and ideals must govern fundraising, not organisational or individual self-interest.** Integrity and consideration are as important for fundraisers as financial targets and essential for reaching those targets. Fundraisers should always do the right thing by donors, treating them always with respect in the language they use, in how they communicate inspiration and in the fundraising practices they pursue. Pressure, persistence and undue persuasion are not the right approaches for fundraisers. Rather they should treat donors as their cause's friends, not merely a route to more resources. Friends give as well as take and don't always ask for money. Rather than persuasive asking, effective fundraising is more about inspiration and shared conviction*.
- 4. While fundraisers should exemplify both passionate commitment to their cause and appropriate professional standards, passion is usually more valued by donors than technique or slick professionalism.** Though they greatly value competence and commitment, many donors are suspicious of business practices and overt commercialism from the charities they support. Many would prefer to see a different, more distinctive, more obviously values-led approach. Donors generally will prize passionate belief in the cause ahead of technical abilities, particularly in sales and marketing, which donors often see as inappropriate*.

Some of the hypotheses behind the following principles have been proved and are already widely accepted. Some will be difficult if not impossible to prove conclusively but nevertheless are deemed to be the right things to do.

* Though there are some pointers from existing research, lack of time and financial resources have not allowed the Commission to fully research and test empirically the following assumptions. But we hold that they are self-evidently true.

** These assumptions could and should be proved. We believe that they are likely to be shown to be valid over time.

- 5. Fundraising should be measured long term, not just on immediate returns.** Fundraisers should be judged at least as much by longer-term, more donor-friendly criteria rather than just by income raised now. New criteria should include retention, satisfaction, non-financial engagement, future giving intentions, loyalty, commitment and lifetime value.
- 6. Not all fundraising is good fundraising.** If any method of fundraising is shown to be unacceptable to the public, fundraisers should commit to changing it so that they do provide, consistently, a good donor experience. If any public fundraising method cannot be made demonstrably acceptable to the public, it should stop.
- 7. Fundraising is an investment, not a cost.** To succeed and be effective in delivering the best practical donor experience, donor-based fundraising strategies and staff require sufficient, sustained and frequently significant investment. Charities are obliged to keep often-substantial amounts of money in reserve to meet forward commitments, funds they prudently invest to get maximum return for minimum risk. Over the years, many charities have shown that investment in fundraising can be many times more secure, reliable and productive than almost any other available investment**, so investment in fundraising should be encouraged. Lack of appropriate investment in the donor experience and donor relationship development should be seen as irresponsible if available funds are deployed elsewhere in short-term, less productive and less crucial activities.

The pillars of fundraising change that follow are all vital if change is to come. Each is informed by the 28 CDE projects, with input also from other events and initiatives launched or encouraged by the Commission since it was founded in the summer of 2015. Wherever possible these pillars will be measurable. Taken together, the 12 pillars will support and make possible the donor-centred approach that will sustain our great causes, and upon which all fundraisers, volunteers and paid, will be judged.

The 12 pillars that, collectively, will support fundraising change.

- 1. Integrity and consideration will underpin each and every contact with a donor.**

Fundraising communication now is about what donors want or will happily receive, not what fundraisers want them to have. Fundraisers simply have to get used to this; to make sure they deliver only what donors will agree they want.

Fundraisers will always do the right thing by donors, always treating them with respect and consideration in everything from the language fundraisers use to the style and content of each contact.

Integrity is not something you show others. It's how you behave behind their back. It's about doing what's right, not what's easy or quick.

- 2. Donors will be in the driving seat.** Giving is voluntary. Every donor will be in consistent, effective control of his or her personal, individual relationship with the causes he or she supports.

- 3. The right people in place.** Charities will recruit the best, most suitable, most committed people for this very special job and develop them appropriately across all parts of the let's change the world-for-the-better sector. The top five attributes of donor-centred fundraisers are people skills, passionately cause-driven, adaptability and agility, listening and responding to donors' needs and genuine, authentic integrity.

If you aren't at least as passionate about your cause as your donors are, don't settle. Leave. Go now.

Inspiration is the compulsion to act on an idea. It aligns values and creativity with achievable, practical action.

- 4. Every communication with donors should leave them feeling better about their support after the communication than before it.**

So, inspiration rather than persuasion. Plus, showing donors the difference they make. Fundraisers will perfect their storytelling skills in a new approach to impact measurement, accountability and reporting. Communication will be of the highest standard built around the principle

of the five Fs – fundraisers will become famous for providing frequent, fast, fabulous feedback. New standards will be applied for direct mail, telephone, digital, face-to-face, publications, broadcast, social and other media.

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Satisfaction is not enough. We should exceed expectations, spread consistent delight in the joys and rewards of giving.

5. **Wonderful to deal with.** A new approach to donor recognition and welcome is recommended, plus freshly reinvigorated, measurable standards of consistently excellent feedback, transparency, customer support and donor-friendly service.

6. **Learning, learning, learning.** Through effective induction and measurable initiatives such as those described in the Commission's 28 projects, fundraisers will learn how to be donor-focused in fundraising, how to test and innovate, offer preferences and choices, plan donor journeys and deliver satisfaction consistently, so as to improve the experience of all donors.

Whenever you turn to them, your donors won't let you down.

Leadership is the art of getting other people to surprise themselves.

7. **Leading from the front.** Trustee boards and senior management teams will engage properly and practically to fulfil their duties to donors with pride and pleasure. Fundraising leaders will become familiar with, confident in and be judged by the characteristics of donor-focused leadership as defined in the 28 projects. They have been shown to produce truly great fundraisers and shape the success of great fundraising organisations.

8. **New views of risk, investment and return.** Fresh, informed attitudes to return on investment for charities mean no more timid under-achieving from what was once the worst-resourced and most risk-averse sector.

Innovation is oxygen. If you stop trying, it'll be a failure. Until then, it's an experience.

Any charity that has investments in financial markets in its reserves but hasn't invested properly in delivering the best possible donor experience is doing things wrong.

9. **Aiming higher. Increased aspirations of excellence.** Charities will become renowned for boldly and enthusiastically doing things right. No more aiming low or settling for sub-standard. Every donor will come to expect the same care and service levels that should be (but too often isn't) routinely enjoyed by legacy pledgers, long-term supporters and major donors.

10. Improved public passion for the changes fundraising leads to, based on better storytelling, understanding and clear explanation of the daily realities of charities. The public's view of charity expenditure on administration is just one of a range of issues that need better explanation. Charities have allowed the public to believe that any such expenditure is a bad thing, that lower expenditure on administration must by definition be good. Yet donors should insist that charities are properly and appropriately administered, otherwise how can anyone be confident that any of their gift will get through to the cause they wish to support? With appropriate, carefully judged investment in the efficient and effective running of the organisation, donors' funds won't risk being wasted.

When you speak to us it's your experience of the call that matters. Our callers will be rewarded for their donor-friendly service, not for how much they raise.

We can increase the social capital of our supporters by providing them with relevant content they'll wish to share.

11. **Eagerly innovating to change the face of charity.** Social marketing and networking plus innovative new platforms and changing technologies all can be combined now to offer donors new ways of connecting, networking, sharing and spreading inspirational campaigns and messages. Pressure and undue persuasion will be unacceptable. Traditional charity marketing will be replaced by new, authentic, donor-centred ways of communicating.

12. **A new promise to donors.** Donors will support solutions that are consistent with what they believe. For everyone who wants to make a difference in this troubled world, the most delightful, fulfilling action will be to support a donor-centred charity. So, the Commission has defined practical actions where fundraisers can and should give their audiences a better experience of how they make a rewarding difference when they become a donor.

'Thank you for building a charity with ethical fundraising that focuses on happy, engaged long-term supporters rather than short term financial drives with less than ideal methods. This makes me even happier to support your cause.' A donor.

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Promise: a proud new commitment to everyone who makes a difference by being a donor.

When supporters can easily see the impact from and the benefits of their support they'll want to do more of it and will tell their friends. The scale and range of changed practices outlined in the following practical actions give the Commission confidence to believe that all fundraisers in future will be able to make a detailed, inspirational compact with their donors and stick to it, so that supporters can better understand and appreciate their role in supporting the causes that matter to them. All charities should make such a promise, so that their supporters know what they can expect from the causes they support and that the solutions they provide together will be entirely consistent with what supporters believe in and want.

There is no one promise or set of promises to donors. Organisations will find and adapt the content for their promise themselves, to suit their own circumstances and the needs of their donors. Some suggestions for that promise include:

- We are proud of our supporters and treasure their role in making possible everything our charity achieves. Our supporters – donors who give money and volunteers who give their time and talent – will always be at the heart of our thinking, top of our concerns.
- Each supporter will always be in control of his or her individual relationship with our cause.
- We see our supporters as partners in making our mission achievable, so as much as practical we'll seek to directly link our supporters with our work.
- All supporters will be treated equally at all times with care, consideration, integrity and respect. There will be no coercion, pressure or undue persuasion and the donor's right to say no will be cheerfully and immediately accepted.
- Whenever practical we will be available to our donors, eager to listen to what they have to say and to take action appropriately. Our supporters will deal with named people they can put a face to and who are easy to contact in ways and at times designed to suit our donors.
- Our charity will report on the differences donors make with honesty, clarity, precision and impressive promptness. Our mantra will be 'the truth, told well' and we'll aim to be famous for fast, frequent, fabulous feedback (the 5Fs).
- Openness and transparency will be watchwords that guide our accountability to all supporters.
- Supporters can expect passionate commitment to our cause to characterise their every contact with us.
- We will provide consistently inspirational and effective communications to spread the joy and sense of fulfilment and achievement that can come from giving to a great cause. And we'll offer donors the chance to choose what they hear about from us, how often and when.

As these changes take root and spread, charity supporters, charity staff and the indispensable causes they make possible together will be stronger, benefitting all in our society as well as all the donors whose generosity makes it all possible.

Practical actions: 526 tips and advice on ways to improve the donor experience, plus more than 250 case histories to learn from, copy and adapt.

The Commission on the Donor Experience is leading change now with hundreds of individual recommendations for helpful approaches, techniques, advices and new initiatives that together will add up to deep, lasting change in how charities contact their donors and potential donors and in what donors can expect to get from the experience.

Each of the Commission's 28 projects has produced detailed principles that should govern their specific area, plus a cornucopia of practical hints, tips and recommended actions that will quickly add up to a better experience for all donors. In addition, fundraisers can draw upon hundreds of specially-compiled instructive case histories of donor-centred fundraising that works, from charities of all kinds and sizes. All 28 projects are linked here for easy access so you can download the summaries singly or collectively, or the full content individually. The directory of case histories is also available for easy downloading.

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Inevitably there are aspects of the donor experience where, for reasons of time and lack of resources, the Commission has not been able to comment. Also, in parts of the 28 projects the Commission has barely been able to do more than scratch the surface, plus there are many areas where there's still ample opportunity to expand and improve. From the end of April 2017 the 28 projects listed above will be published on-line so they can be available first through a 'beta' contributory process then fully to everyone in July of 2017. Yet the Commission accepts that even as these recommendations are understood and implemented fresh new ideas and aspects of best practice will emerge. That's fine. It's important to appreciate that all of the project areas are inevitably ongoing works in progress. Supporters of the Commission on the Donor Experience and its successors will continue to distil, add to and expand the body of knowledge in this important field. Though you can start implementing these changes immediately, this work is still evolving, still in progress and you can find out more about its evolution and how you can play your part, [here](#). Please do get involved and play your part in shaping the development of donor-centred fundraising in coming years. Literally, the future of voluntary action is in your hands.

In September, 2015, the Commission on the Donor Experience explained its purpose in its founding document.

The Commission's objective is to increase both funds raised and donor satisfaction by appealing to the feelings, thoughts and desires of donors as well as emphasising the needs of the charity. The Commission will identify best practice and capture examples of it in order that these should become shared and common practice.

CDE's volunteers have delivered on that undertaking and the Commission or its successors will add to it too, over coming months. With a depth and breadth never before contemplated, vast areas of best practice have now been defined through a uniquely collaborative sector-wide process which has led to detailed examples that should become the basis of our shared common understanding of what is, and what isn't, a reinvigorated standard of best practice. Together these embody a new, donor-based approach to how charities should and will raise money. We commend these initiatives to you and ask for your support in helping them to spread. If fundraising in Britain is to succeed and our priceless, exemplary voluntary sector is to flourish as a result, we need to get this right, right now.

01

Enhancing the ways we use language

Project 01. The use and misuse of language

Andrea Macrae and Chris Washington Sare, April 2017

Reviewed by: Matthew Sherrington

The original brief

So often people in business inadvertently use language inappropriately, whether as insider speak, jargon, acronyms or just with insufficient thought, consideration or respect. This project will share good practices plus examples of common misuses to help fundraisers use language appropriately so they can swiftly yet significantly improve the donor experience.

For senior management and trustee boards, this project will:

- Give impetus to reviewing the job and department titles within your organisation. Are they supporter focussed?
- Encourage them to review communications to ensure any navel gazing is removed and that the cause is front and centre.
- Ensure transparency about the source and credibility of any case studies, stories and quotes.
- Help them clearly define their organisational values and ensure their communications reflect these.
- Show why it is important to review and audit the use of feedback mechanisms and permission statements. They should consider how you can build opportunities for feedback into your communications.
- Help explain the importance of testing to find out what language works best for their charity and their supporters.

For donors, this project will:

- Show they are appreciated through respectful and engaging communications.
- Improve charity's communications by telling them more about the cause and work their gift is enabling and less about the actual charity. Less 'we' and 'us' language appears.
- Build trust with them by telling stories that are first hand, true and credible.
- Make them aware of the values of the organisation they are supporting.
- Improve communications and reduce the use of jargon and inaccessible language.
- Increase the number of ways they can make their views and preferences known.

Summary guidance

Why think about language?

The language charities use to communicate with supporters, and about them, strongly influences supporters' feelings about fundraising, about individual charities and about the sector as a whole. Communication with supporters is entirely made up of words and images. Together, words and images are at the core of what charities do and how they work. And yet, across the sector, the nature and power of images – the vividness, the ethics, straight-to-camera gaze, etc. – is scrutinised in much more depth than the nature and power of words.

Often, when language is talked about and thought about, it is in relation to the persuasiveness of appeals. But charities communicate with supporters in lots of ways, from the face-to-face fundraising pitch to the 'Contact us' webpage, from the newsletter to the phone call, and from the email sign-off to the annual report. To date, the level of attention most organisations pay to their language use has not matched up to the role it plays in their relationships with supporters.

The principles outlined below, and detailed more extensively and with examples in the full project document, offer simple ways of developing language use to improve supporters' experiences of communications and of charities more broadly.

Nine key strategies to enhance the ways we use language

1. **Rethink language to reflect, respect and engage with the views and feelings of supporters.**

The words we use reflect the way we think. Charities can develop their use of language to better focus on, respect and ingrain the values, views and feelings of supporters. The most effective way of achieving this is by fundamentally reorienting language to more directly reflect supporters' perspectives and interests. Charities can embed this approach at all levels of the organisation. Consider the implications of department names, and how they can be reconfigured to reflect and instill a supporter-centric approach.

For example, a department name such as 'Donor Acquisition and Retention' reflects a fairly de-humanising approach to supporters. It seems to prioritise supporters' monetary value in a cold and clinical way. Something like 'Supporter Development Team', on the other hand, recognises the supportive nature and value of an individual's relationship with the charity beyond the financial transaction, and suggests that there are options in the ways the supporter's relationship with the charity can evolve (rather than them simply being 'retained').

Do a thorough 'orientation check' of all internal and external language. Wherever language could be more supporter-centric, recast it to align with and reaffirm supporters' viewpoints and interests.

This is more than just semantics: language use reflects and reinforces attitudes and behaviour. Ensuring your organisation's language expresses a supporter-centric approach is a key step in ingraining support-centric behaviour. Most of the recommendations made by this project stem from this essential principle.

2. **Talk less about the charity and more about the cause, the work, the beneficiaries and the supporters.**

Too often, the charity itself takes centre stage, dominating too many sentences through too much talk about 'us' and what 'we' do or have done. Lots of evidence suggests that supporters are primarily interested in the cause and in the people, animals or things at the heart of the impact. Let supporters hear from and about these people and things: these should be the main focus of communications and should take up the most words, either as the topic or the speaker. The charity itself is important – it is the charity that the supporter develops a relationship with – but the cause and impact tend to be of more interest and personal relevance.

The wealth of data on this issue is convincing, but you can do your own supporter surveys and background and foreground different people and things according to their feedback. Generally, though, it is good practice to avoid accidental (or deliberate!) organisational egocentricity.

3. Communicate authentic content with honesty.

Authentic, first-hand reports can be very powerful and can offer supporters a real connection with the cause. Sometimes charities use invented case studies, stories and quotes. Though this is sometimes for good reasons, it can make readers suspicious of being manipulated and can undermine the credibility of a message. In the current context, this is a particularly risky strategy.

Where fictitious examples are necessary, transparency about this is crucial to avoid alienating supporters and to prevent further damage to the sector's reputation. An honest, open explanation and justification is easy to include, and it can even help communicate some of the problems at the heart of the cause. Use real stories where you can, and be transparent about any invention.

4. Communicate values, and do it consistently.

Evidence suggests that supporters feel more positively towards a charity, and feel more satisfied by its communications, if the charity clearly communicates its values, ethos and identity. Develop a coherent 'voice' for your organisation. Generate ready-to-use phrases expressing core propositions, mission statements and standard descriptors. Create guidance on a 'house style' with examples of tone of voice. Use every communication with supporters as an opportunity to reflect and reaffirm your values.

5. Subvert expectations.

The formula of the charity appeal is so familiar to supporters that many feel they don't even need to open the envelope, or the email, to know pretty much exactly what's inside. Of course, the formula hasn't arisen over the years simply through custom or accident: trial and error has allowed the sector to hone in on some basic features and structures which work well. However, familiarity breeds boredom and disengagement. Charities need to surprise supporters, to grab and keep their attention, with unusual, innovative communications.

Charities can productively exploit the conventions of the sector's communication styles, and the norms of their own organisation's specific tone of voice, by occasionally, tactically and playfully deviating from them. Several charities have had great success with innovative product names, mail formats and campaign settings and styles. Adding some more creative and attention-grabbing messaging in amongst the more conventional communications can surprise and delight supporters, reignite interest in the cause and reawaken allegiance to an organisation.

Links to CDE project 12 – *Inspirational creativity*.

6. Use inclusive, accessible language and avoid jargon.

Ensure the language of mass communications is simple and jargon-free. Using long words and complex sentence structures can sound impressive, but it tends to unnecessarily cloud meaning. Short, simple words, sentences and paragraphs are the most effective means of getting the message across to the most people. Even in more conventionally formal kinds of communications, like annual reports, data protection information, and details of how to make a complaint, accessible language conveys meaning more easily.

In any text which is made available to public audiences, it's also a good idea to avoid using internal jargon (such as 'acquisition', 'product offering', 'upgraded', etc. within fundraising). Jargon is convenient for efficient communication within an organisation: it is not designed for public communications, and it is often impersonal and obscure. If the public forms even just a small part of the audience for a text, make sure the language is totally jargon-free.

Likewise, avoid expressions which might be hard for some members of the public to understand. Metaphors – even ones which have become part of everyday expression, like 'on the same page' and 'change your mind' – can be confusing for those for whom English is an additional language. Keep language as simple and literal as possible.

See CDE project 11b – *Direct mail* and project 11c – *Digital*

7. Invite feedback and turn it into dialogue.

Most charity communications are one-way, talking at or to supporters, with no space or invitation for a response beyond a donation. The act of inviting feedback, input and response is crucial for a healthy, well-functioning and informed communicative relationship. How can a charity really know what works for its supporters without explicitly and regularly inviting supporters to communicate with the charity? There are many ways of effectively and efficiently building an invitation for dialogue into communications. The simple act of asking for supporters' views helps to convey respect for those supporters and enhance their relationship with the charity.

Asking for feedback is the first step. Receiving and processing the response is the second. Third comes explicitly acknowledging that response, and communicating back in turn, addressing the topics and issues raised. Thank supporters for their comments. Take up their topics and use their language. Demonstrate that you're listening and that you care about and value their input and views. Develop a genuine dialogue with supporters to learn precious insights, enhance their experience and strengthen their relationship with the organisation.

See CDE project 3 – *Satisfaction and commitment*, project 11 – *Communication with individual donors* and project 13 – *Giving choices and managing preferences*.

8. Make contact permissions options work for supporters.

The permissions statement is a contentious area. Public concern about use of personal data, and about receiving lots of unwanted communications, has been a big part of recent criticism of the sector. Permissions statements can feel fraught with tensions. These agreements, though, can be used as a constructive means of developing the supporter-charity relationship. Careful wording and management of permissions statements can turn them into tools for developing trust, showing respect for supporters' preferences, and explaining the ethos and rationale of the charity's communications.

Each option should be explained in clear, simple language, enabling supporters to make informed choices that meet their needs and shape their expectations. Permissions statements should also include details of the kinds of communications a supporter can expect through any particular channel, the advantages of each kind of communication, and how often those communications are likely to be received. These simple steps can make all the difference to a supporter's satisfaction with future communications, and turn the 'opt-in' into a message about shared values, choice and mutual respect.

Links to CDE project 13 – *Giving choices and managing preferences*.

9. Test your communications to find out what works best for your charity and your supporters.

The charity sector excels in effectively testing inserts and images. Language is just as testable, using many of the same, simple methods. Lots of different elements of language are worth testing in different communicative contexts, including the use of an opening question, the phrasing and placement of the call to action, etc. A lot of assumptions about language in charity communications lack sufficient evidence, and many common principles need to be adapted to specific contexts (i.e., individual charities, different channels of communication such as email or letter, etc.) to be effective. Through careful testing with different supporter groups, charities can really understand what works well for their charity, with their supporters, and why.

A final word

Language use may just be one part of the supporter experience, but it is a hugely significant part. Very little of the communication between charities and supporters is not dependent on words. If a charity's language use is careless or ill-considered, it can drastically undermine the effectiveness of the charity's work. Language is too central to the supporter-charity relationship to ignore.

The principles outlined here are the essentials of good practice. These principles guide you through a re-examination and reconfiguration of core elements of communications to enhance supporters' experiences. Each of these principles can be taken far beyond the basic outline provided by this project for even greater effectiveness, but this summary provides a strong foundation from which to start.

02

Anyone can be vulnerable

Project 02. Fundraising and vulnerability

Martin Sheehan, February 2017

Reviewed by: Lynne Berry and Catherine Miles

The original brief

Everyone has a right to be part of a key attribute of our society – giving to charities. Equally, no one should feel pressurised into giving and this is especially true at times of vulnerability. This project will propose updated guidance and recommendations for rigorous best practice in this crucial area, where fundraisers must be seen to be caring, sensitive and above suspicion or concern.

For senior management and trustee boards, this project will:

- Help them make important strategic decisions on how the organisation will deal with vulnerable people. This may include:
 - a: Having a vulnerable person policy in place. Once in place, organisations should ensure that all of their fundraisers and suppliers are aware of its contents.
 - b: Operational decisions, such as cut off times for outbound phone calls and door to door fundraising i.e. not in the hours of darkness during winter months.
 - c: Making sure monitoring procedures are in place to ensure compliance against the policy.
 - d: Having a data policy on how to record and use information on potentially vulnerable people. Note, it should not be assumed to always exclude all vulnerable people. Please see the body guidance for further details.
- Show them why it is important for fundraisers to consider non-financial opportunities for vulnerable people, so they can support your charity in other ways.
- Show why donor choice should be an integral part of your fundraising and that communications aren't always asks. There should be 'thank you's' and feedback on previous gifts included in your organisation's communications plan.

For donors, this project will:

- Make them know they have a clear choice on how and when they are contacted.
- Ensure they do not feel overwhelmed by donation requests.
- Make it clear where they can find the charity's vulnerable person's policy on the website or how they can request a copy.
- Make it clear how to get in touch with a charity via their preferred method.
- Give reassurance to the families, friends and carers of vulnerable people that charities will respect the wishes of those who are vulnerable. It will be easy for them to amend or stop communications if required.

The Issues

‘People do not like to say “no”.’ It is an unintended consequence of increased fundraising activity over time: people who have been generous in giving have become increasingly targeted, both by now defunct data sharing practices and by organisations looking to make the most of the contact data they hold.

As the media highlighted in 2015 – and as research for this project confirmed—this has in itself created a form of vulnerability, as supporters have felt overwhelmed by the amount of information and number of requests they receive.

In addition, the life stage and financial circumstances of many of these donors means their ability to effectively manage their giving without encountering emotional or monetary challenges – which are often intertwined – presents a further problem.

What is ‘being vulnerable’?

We can add to this an understandable difficulty in defining ‘vulnerability’. For some, it may be an enduring health condition, such as dementia, which can affect decision-making; for others, it may be a recent event, such as bereavement, divorce or even a windfall, which temporarily alters the way they respond to the world around them. Let us not forget too that any one of us can be vulnerable in any number of ways at any time—including front line charity staff who work closely with beneficiaries and supporters every day, understanding and helping to address others’ difficulties but potentially taking on some of their stress.

Because the idea of vulnerability is so open to interpretation, then, how do we strike the balance between looking out for our supporters and inadvertently making decisions which, though designed to protect them, effectively remove their right to choose? Most obviously, in order to avoid stereotyping or being patronising in how we manage our communications, we need the ability to understand more at an individual supporter level.

Is the bottom line really the bottom line?

Amongst the internal conundrums that came out during the project workshops was that the need for charities to effectively measure success and drive activity possibly over-emphasises the importance of income alone. It seems obvious, but maybe our need to maximise impact for our causes and beneficiaries means that the time and money required to invest in supporter relationship management is not our top priority.

A knock-on effect of that could be how we brief, manage and reward suppliers (see CDE project 21 – *Working with suppliers*), such as telephone or face-to-face fundraisers, who may be looking at throughput of sign-ups rather than quality of the interaction (one example shared was of a call agent who was criticised for taking too long on a call that ‘only got a £3 a month direct debit’. A few months later the charity learned that the supporter was so impressed by the caring tone and time taken on the call that they donated a six-figure sum following a property sale!).

A final, but significant common thought, was how we can each feel equipped to identify and manage issues of vulnerability, as opposed to knowing there is a policy on a shelf or in a folder somewhere. Clearly certain jobs are more acutely aware, but if ‘any supporter at any time’ needs to be considered, then it needs to be everyone’s business to work to the same goals and standards.

Taking these principle issues on board, and in an attempt to give some food for thought as well as a practical check-list for those organising campaigns, as well as for those authorising them, there follows a digest of the key principles raised by contributors to the project and some suggested actions. These pretend to be neither exhaustive nor proscriptive—fundraising is a vast and diverse discipline with many nuances that those closest will be best able to manage for themselves—but they came up time and again in conversation. It is hoped these will lead to more respectful, universal and effective relationships with supporters.

The Principles

Throughout the project, a lot of reference was made to existing guidelines within the sector and elsewhere that have sought to address issues of vulnerability. Some of these – [the British Banking Association guidelines](#), for instance – have been written with specific audiences or professions in mind, and include input from the sector. Rather than reproduce those, here are some abiding principles that could directly improve donors' experience.

It is not just about people who are vulnerable!

All of our donors deserve respectful, timely and appropriate contact with us. As other projects for the Commission for the Donor Experience (Commission) demonstrate (in particular CDE project 13 - *Giving donors choices and managing preferences*), there is room for improvement on a number of fronts. We may well not know that someone is in vulnerable circumstances and so should be making sure that nothing we do might confuse, compromise or mislead anyone.

Believe in donor choice

People give to charity for many reasons—too many for us to reasonably list and tick off as part of our relationship with an individual. We need to make choice part of our conversations: to clearly demonstrate that what a supporter tells us about how or why they give will make a difference to how and why we continue to contact them.

Also, unless we have a reason to believe otherwise, people who we know to be in a vulnerable state still have the right to make decisions and that must be respected. One person we spoke to was the carer for a person with dementia who said, 'John can make his own mind up. It doesn't matter if you or I think he makes an odd or bad choice.' What we have to do is support our supporters, giving them adequate time, information and the clear opportunity to choose.

Get to know our supporters

Following on from the data capture element above, the better we know the people who donate, the better able we are to understand the issues or challenges that give rise to vulnerability.

Are there particular parts of the population who support our charity? How do we record information about our supporters that might help make communications more appropriate (indeed, can you record it?)? There is no set in stone way of dealing with this sort of data capture and due attention must be given to its sensitive nature. Where specific policy decisions may be made dependent on a supporter's needs, there is a clear interest to gather and store relevant data, always using a method that does not compromise privacy. (fundraising-compliance-forum@googlegroups.com has been debating this.)

It is also worth considering whether our supporters are also our beneficiaries and whether that status has any bearing on our approach to relationship management. We heard a powerful story of a gentleman in a hospice who was adamant that being a patient there did not stop him fundraising for them, but it was somehow hard for their fundraising team to know how to deal with that in an honest, yet ethical way.

Wear our supporters' shoes

What is it like to receive fundraising communications from us? When writing copy or putting together imagery (see CDE project 1 – *The use and misuse of language*), to what extent do we consider the feelings of the supporter, or prospective supporter, beyond motivating them to give? There is a common sense that a disclaimer will do the trick but it is often at the end of the copy, after the signature, and it will be too late by then.

Also, thinking about people finding it hard to refuse, how co-ordinated are the various communications that a person may receive? As part of the project, a survey was run with supporters, beneficiaries and a representative sample of the public. The survey is available from the Commission website and could be a useful tool for any charity looking to understand the effect of its fundraising activity beyond the response rates.

The project research found that a substantial minority of supporters in older age brackets genuinely loved to hear from their favourite charities but found it hard to resist donating when they did, ultimately feeling overwhelmed (which is not a comfortable word for us to hear). If a person is isolated and likes letters through the door, should every one of those be asking for something in return?

In further focus group research for the Commission, it has become even more apparent that it is the impact of donations that matters most to donors. How many of our 'thank you' communications talk about the charity in general and fundraising activities at the expense of drawing a clear line from donor to beneficiary? (This is straying into the experience project a little, but we should remember it is usually requests that make donors feel overwhelmed, not thank yous!)

Look at the long-term return

Let us be honest, even in an unregulated world it is far better to keep supporters than to have to go out to encourage new ones. Whatever model of acquisition is being used, it will be the long-term, loyal supporters who provide the sustainable income and all research shows that happy people remain loyal.

A number of charities have shown that by asking less frequently, thanking more and demonstrating the impact of gifts, we can retain more supporters and engage them in a wider range of activities with the charity (see CDE project 4 – *Thank you and welcome*). This is demonstrated through, for instance, frequent engagement from financial supporters in campaigning, volunteering or helping to raise awareness, and when they do this they are more likely to repeat or increase their financial support.

Whilst diversifying supporter journeys with a mixed bag of opportunities early on may reduce shorter term fundraising conversion to a second gift, the longer term advantage of having engaged supporters with a greater understanding of the organisation's work, and who are known to be predisposed to donating too, should result in longer, more profitable relationships (see CDE project 5 – *The supporter's journey*). Measuring fundraising performance by relative lifetime value could prove to be a more sustainable indicator of success.

Ask yourself, 'What can I control'?

There are ways of working or activities carried out for the best reasons that could unintentionally create a vulnerable feeling or situation. One example we heard a number of times was of door-to-door campaigns that aim to catch people at home and, therefore, sometimes mean calling after dark, when a stranger at the door may make anyone ill at ease. Training can deal with this incident but could it be prevented?

All of our marketing materials can be controlled too, such as outer envelopes or the use of see-through packaging. Where our logo may be an obvious, proudly worn part of our branding, is empathy with your cause something all supporters want to be publicly known? For most organisations and supporters, it may not be an issue, but for political, campaigning or certain health causes, it may be that plain packaging works best for the receiver, in case being identified as a supporter could lead to a difficult conversation or position for them.

There is also the consideration of how creative and compelling copy-writing or images lead to content that crosses the line between articulating need and causing a feeling of guilt (see CDE project 6 – *The use and misuse of emotion*). We want supporters to empathise with our cause and make the choice to give, not feel they are making things worse if they cannot act or donate.

It probably goes without saying, but quantity and frequency figure here too!

Consider the training needs of staff and volunteers

By making everyone in the organisation alert to the potential of speaking to someone in a vulnerable position, we can equip them to spot possible issues and effectively handle them.

It is also important to encourage staff and volunteers to share stories and experiences, as part of their own emotional resilience as well as discovering more about supporters. One organisation talked about how they

encourage all staff to listen into calls to their helpline on a regular basis, to bring them closer to the cause and to learn from the helpline team how to manage conversations empathetically.

If an organisation has a service delivery element, the front-line staff ought to know how to talk about fundraising as well so that donor choice and ethics are managed respectfully and that the whole organisation operates as one. There is nothing like a charity not being able or willing to take a donation to damage a reputation!

Having a policy is not enough

Lastly, bear in mind that every organisation, charity and agency that has come under criticism in recent times for failing donors has had a policy on vulnerability. What has not been apparent is how that runs through the organisation, or how adherence is monitored or even measured. Management needs to be clear that respect for donors' wishes is at the heart of fundraising, so that listening, hearing and acting on potential issues becomes part of relationship management.

We ought to have compliance monitoring that passes the 'show me test'. That could be embedded training on vulnerability within induction programmes or a proactive data capture process on our CRM. It should not simply be a case of pointing to the document on the policy shelf.

The Actions

As well as outlining the more strategic questions above, we wanted to suggest some tactical solutions or food for thought that might be practical to start implementing straight away. Of course, some charities are already doing some or maybe even all of these, and one size does not fit all, but there will always be the chance to improve.

Ask your stakeholders what they think

As mentioned above, as part of the project we ran some research with supporters and beneficiaries of two charities (Age UK and Alzheimer's Society) as well as a representative sample of the general population, asking their experience of fundraising and attitudes towards it. A précis of the results and the questions themselves can be downloaded from the Commission's website but could this be helpful for you if you have a defined supporter group who may be vulnerable?

Are you asking donors how they feel about fundraising in general, as well as why they support your charity? How are the responses turned into action within your organisation? Would you be happy to share research with others so that we build a picture of the true voice of charity supporters? A product of the Commission could be a regular 'state of the nation' piece of research amongst charity supporters, for instance.

Review your data capture and management

Whenever you interact with supporters, are you able to capture and store information that includes reports of what your organisation would define as vulnerability, and might you have associated KPIs that include spotting and acting on any issues that arise?

Also, look at your feedback loop for preferences, so that when things are altered it has an immediate effect on how you communicate. There is no point in logging on one system that a person does not want to receive 'phone calls if you are running campaign selections from a different database!

If someone has let you know something about their circumstances, how are you flagging it? Would it be straightforward for someone using the front end of your CRM to see critical information? One telecoms operator has a 'blue flag' system that marks customers' records, so that anyone in the organisation—call centre staff, engineers, etc.—can adjust their approach accordingly.

Is there support that you can offer?

We spoke with a major utilities supplier that has made a considerable investment in enhancing its CRM to provide advice to customers that goes way beyond their immediate relationship. If a person is flagged as having difficulty in paying a bill, for instance, the system allows the team to help guide the customer to support services or statutory benefits to which they are entitled but may not be using.

Encouraging your staff, volunteers and agencies to take that holistic view is not only ‘the right thing to do’, but it demonstrates the commitment and care that defines our sector. It is what we should be known for and tells a story more enduring and powerful than a sensational headline.

Is there support that can be given other than financial?

Fundraising campaigns always need a financial return first, but the majority of people are not going to give (no matter how good the ‘ask’ is!). So how do you leave your supporters feeling good about not being able to donate?

Make sure that everyone fundraising for you knows about other activities in which the charity is involved. It may be signing up to an online campaign; perhaps even volunteering some time; or something as simple as telling a friend about your work. Most supporters give money if they can, but if your values are clear and opportunities are explained, they will give in other ways too.

Work with suppliers and agencies to understand your supporters’ voice

See CDE project 21 – *Working with suppliers*.

As well as regular income reports, get third-party fundraisers to record and interpret what they hear from your supporters. Every contact with your charity is an opportunity for stewardship, so encourage fundraisers to go ‘off script’ and have proper, personalised conversations. Find out what supporters think about your work, your brand and your values.

If someone is not able to donate, but has taken the time to listen or read about your work, make sure the last thing they hear at that point is along the lines of: ‘Thank you. I hope you’re as excited as we are about the difference that we’re making together.’

Think about any incentives you are sending to supporters

See CDE project 11b – *Direct mail* and CDE project 11d – *Community fundraising*.

If you are using incentives in mail packs, to what extent are they engaging and in line with your purpose? Is there any element of producing even a slight guilty feeling that results in a donation?

There is clearly a difference between offering something in return for effort—T-shirts for race competitors, for instance, which also work for brand awareness—and sending out address labels or pens in acquisition mailings, but what is the emotional effect on the donor of receiving an incentivised pack? The answer is most likely one of guilt or compulsion to give, and is not that creating vulnerability?

Make it easy for supporters to contact you

See CDE project 16 – *A distinctive service culture*.

Is the contact information on all of your literature, website, emails and other materials the best for the audience? Does it go straight to the person most likely to be able to help or might they have to be passed around the organisation to get the right response?

If someone is distressed or concerned, they want to be able to communicate with the right person as quickly as possible. Try to make your supporter care team the first number or address that they see. Make sure your process for responding—office hours, voicemail or response times—can cope too!

Brush up your policy

Just as having a policy is not the end, making sure that your policy is bespoke to the needs, issues and capabilities of your organisation is vital. Whilst principles may be universal, there may be specific activities or rules that apply to your organisation

For instance, following research with beneficiaries, Alzheimer's Society decided not to make fundraising telephone calls to supporters they knew to have dementia. Those supporters would still receive fundraising appeals and updates about the organisation, but the lesson was that people with dementia felt less able to understand information and less comfortable making decisions on the phone—and it could cause unnecessary stress.

Remember, this is not about blanket policies applying to all supporters. It is responding to the specific needs of those whose known personal circumstances demand consideration.

Involve everyone. Give staff, volunteers and third parties clear guidelines

There are so many touchpoints for charities, but for supporters it is one entity, so how can you think and feel like that? Make sure service delivery staff are aware of the needs for fundraising and vice versa, and encourage one to look out for the other.

There is a wonderful story of a person who was injured in a road accident and treated by air ambulance crew. Although they lost a leg in the incident, they wanted to help the air ambulance. The paramedic was able to arrange for the person to begin working as a speaker at fundraising events. Importantly, this was also a part of the healing process for the patient whose recovery from this traumatic injury was bettered by finding new purpose.

What are the best stories for your organisation, the ones that never fail to inspire? Does everyone know them?

Think quality, not quantity

See CDE project 16 – *A distinctive service culture*.

Use your feedback or complaints handling process to identify any root causes that are specifically around areas of vulnerability, from frequency or type of communication to the font size in mail or on the website to understanding the way the charity spends its money.

Are you able to allocate time to going through verbatim feedback and draw significant conclusions (how often do phrases like 'I give to so many charities and so I need to stop. Sorry.', come up?)? Are you able to run some short tactical pieces of research with people who stop their direct debits?

Look at fundraising targets for acquisition and retention, and consider how you are measuring the benefits of long-term support. What sort of behaviour is being encouraged to get to those targets? If there is too much emphasis on the volume of supporters rather than overall lifetime value, and is that in the best interest?

Make a donation

Lastly, be a supporter. Go online and hit 'donate now', call the number on your website, text the latest short code... and see what happens. Keep a record of what happens and when, and compare it not only to your own processes but also to your own expectations of good service. If anything fails to match up, change it!

Bear in mind the quality of the experience and keep playing the role of donor. How much do you feel your organisation has taken into account what it knows about you to personalise your journey? If you did not already know what an amazing organisation it is, would you consider donating your money to it?

The Last Word

Vulnerability, then, is not a state of mind or a health condition. At any time anyone could be feeling some kind of vulnerability, and so we need to make sure that we are talking with our supporters to understand what they need from us and that we are able to act on it.

There may be some unavoidable practical issues at various levels, but we need to guard against unintended consequences, such as being so acutely aware of potential vulnerability that we make decisions on behalf of our supporters and deny them the right to make their own.

As with all of the Commission projects, the key is in building relationships. Nobody wants to create a social environment where a charity supporter could face the choice between making a donation or turning on the heating on a cold night. As long as we listen, learn and act with the best intention of enjoying a mutually beneficial, enduring relationship, we will not.

We should not be scared of listening to what supporters tell us and tweaking what we do if that is what they want, but without the voice of donors being heard throughout our fundraising we risk creating vulnerability. Each charity will, and should, take its own approach, but we have to be clear that there is a collective responsibility to make every individual enthused about giving—not to our organisation but to charity in general—and that means each of us treating each of them as an individual, with respect to their needs above our own.

As well as each organisation ensuring positive action to identify and deal with supporters' vulnerability, we need to be sure that our codes of practice within the sector are fit for purpose and will adequately protect all parties. The risk of 'overprotection' of supporters through regulation would be catastrophic for beneficiaries but the Fundraising Regulator needs to be assured, and be able to give assurance, that any future headlines are the result of isolated incidents rather than endemic practice. We need to have an action plan for when things go wrong; a culture that accepts that, from time to time, they will; and a sector-wide commitment to trying to ensure that they do not.

Finally, there is no suggestion whatsoever that the sector does not take issues of supporter vulnerability seriously. Relationships are vitally important to everyone involved. It is the prioritisation of systems and monitoring compliance that is less clear; this is especially and increasingly the case when it comes to providing maximum return on fundraising investment to the charities' beneficiaries. By focussing on fundamental elements, some of which we hope are highlighted here, we should have respectful relationships with donors as a matter of course and only have to answer criticism by exception to the rule.

If someone is distressed or concerned, they want to be able to communicate with the right person as quickly as possible. Try to make your supporter care team the first number or address that they see. Make sure your process for responding—office hours, voicemail or response times—can cope too!

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Vulnerability, then, is not a state of mind or a health condition. At any time anyone could be feeling some kind of vulnerability, and so we need to make sure that we are talking with our supporters to understand what they need from us and that we are able to act on it.

There may be some unavoidable practical issues at various levels, but we need to guard against unintended consequences, such as being so acutely aware of potential vulnerability that we make decisions on behalf of our supporters and deny them the right to make their own.

As with all of the Commission projects, the key is in building relationships. Nobody wants to create a social environment where a charity supporter could face the choice between making a donation or turning on the heating on a cold night. As long as we listen, learn and act with the best intention of enjoying a mutually beneficial, enduring relationship, we will not.

We should not be scared of listening to what supporters tell us and tweaking what we do if that is what they want, but without the voice of donors being heard throughout our fundraising we risk creating vulnerability. Each charity will, and should, take its own approach, but we have to be clear that there is a collective responsibility to make every individual enthused about giving – not to our organisation but to charity in general – and that means each of us treating each of them as an individual, with respect to their needs above our own.

As well as each organisation ensuring positive action to identify and deal with supporters' vulnerability, we need to be sure that our codes of practice within the sector are fit for purpose and will adequately protect all parties. The risk of 'overprotection' of supporters through regulation would be catastrophic for beneficiaries but the Fundraising Regulator needs to be assured, and be able to give assurance, that any future headlines are the result of isolated incidents rather than endemic practice. We need to have an action plan for when things go wrong; a culture that accepts that, from time to time, they will; and a sector-wide commitment to trying to ensure that they do not.

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03

Measuring satisfaction and loyalty: How do you donors feel?

Project 03. Satisfaction and commitment

Roger Lawson, February 2017
Reviewed by: Jim Baggett

The original brief

Traditionally fundraisers measure success in money raised now. But as indicators of long-term commitment several factors are more important and more useful than the ubiquitous, historic RFV tool (recency, frequency and value). This project will create a practical guide to measuring these other main indices and will show where relevant research and examples of best practice can be found.

For senior management and trustee boards, this project will:

- Help them consider the metrics they use to measure fundraising success. In particular, senior managers and trustees should put in place measures to record how donors feel and not just rely on short term, transaction based metrics.
- Explain why loyalty, commitment and satisfaction matter and how improving the supporter experience will ultimately deliver more long term income for their organisation.

For donors, this project will:

- Make them feel valued and understood.
- Improve the quality of the overall fundraising experience and emphasise the long term joy of giving.
- Provide mechanisms for how they can report their levels of satisfaction, loyalty and commitment to a particular organisation.

Summary guidance

“The moment that you begin to measure something, you change it – and it changes you!”

Principles

We believe that an obsession with short-term financial KPIs is the single biggest reason that donors are dissatisfied with the way charities fundraise. It forces us to follow ever more aggressive strategies in order to achieve the target amount of income or new donors.

It also means that we never understand the impact of our communications in terms of how we make donors feel about us, or how emotionally engaged they are with us.

Measuring lifetime value is a step forward. It's something many charities do, and it encourages all of us to think about how today's actions affect giving in the future. But it is still measuring transactions, not feelings.

If you are reading this, we assume that you want to improve the experience your donors have of giving to you. In the belief that if you don't measure it you won't do it, we strongly believe that you need to have KPIs in place for measuring the impact of that improvement in the donor experience.

In short, you need to be measuring how donors feel – their loyalty, commitment or satisfaction.

Here are the principles that sit behind our recommendations.

Principles

1. Improving the experience that give your donors will improve how those donors feel about you.
2. How they feel about you affects whether, and how much, they support you in the future.
3. Chasing short-term responses incentivises the fundraiser to create pressure, annoyance and dissatisfaction. Therefore, chasing short-term money risks damaging the way the donor feels about the charity and therefore jeopardises long-term income.
4. To break the cycle of prioritising short-term response over building long-term loyalty requires a commitment and investment of time and/or money.
5. If you want to achieve something, you have to measure it. Therefore, we have to find ways to measure how people feel.

Actions

We believe that it is essential to measure the emotional loyalty that donors feel if you are serious about improving the donor experience. We have outlined five steps to follow to achieve this goal.

1. **Commit to growing donor loyalty by delivering a better donor experience.**

- We haven't just said 'offer a better experience'; we've said that you should do this to 'grow donor loyalty' – that is the aim.
- Understand that making donors feel good about supporting you is good for them and good for you, as it will help you raise long term income.
- There is a growing body of evidence that making your donors feel good about giving to you leads to longer term, more valuable support.

2. **Find out the emotional results that donors value and want from you.**

- Keep it simple, so discover what is most important to your donors and focus on that.
- There is no substitute for knowing why donors give and what they need or want from you.

See CDE project 6 – *The use and misuse of emotion*.

3. **Measure how they feel.**

- Once you know what your donors value, measure how well you deliver.
- This is not about stopping your existing measurement of response and income, but building on it to understand how your communications (especially fundraising) influence how donors feel about you.

4. **Report it.**

- You should report your findings. By telling colleagues (as many people as possible), you will grow understanding of what donors need, share your commitment to giving them a better experience and increase colleagues' confidence to invest in actually delivering it.

5. **Use this learning to change something. Test it and measure again. Keep improving.**

Once you have measured donor feeling, decide what you think you need to do better and test something different – anything! – and monitor changes in both how the donors feel and how they behave.

04

First impressions count

Project 04: Thank you and welcome

John Grain, February 2017
Reviewed by: Charlie Hulme

The original brief

It's in the early stages of contact that the foundations of mutually great relationships are shaped. This project will look at all aspects of the first few days of a donor's contact with a cause, to set out – without making any assumptions as to what each individual might choose – the ideal way to get each relationship off to a good start and to show appreciation appropriately throughout it.

For senior management and trustee boards, this project will:

- Encourage them to audit (at least annually) the way new donors are thanked and welcomed to the organisation.
- Help them see the benefit of fundraisers implementing a thanking and welcoming strategy for different types and levels of gift.
- Make suggestions on how donors can be thanked in more imaginative ways than the status quo.
- Give guidance and advice on how they can evaluate the quality and impact of thanking properly.

For donors, this project will:

- Reduce the number of similar phrases that they read in charity thank you communications.
- Make them feel appreciated for their kindness in giving.
- Ensure they are thanked in a sincere and appropriate way via a variety of channels.
- Not restrict thanking to just when they make a gift. They will be delighted when they experience gratitude at other times and milestones.

Summary guidance

Thanking and welcoming are not fundraising functions. They are not about raising more money, and they should not be measured in this way. They are an essential part of any supporter care programme, where the objective should be to provide the best possible service and care for every single supporter in the most individual and appropriate way. Achieving these objectives will deliver enhanced loyalty, longer-lasting relationships, genuine supporter advocates, and ultimately a stewardship function that is the bedrock of better, more sustainable fundraising (links to CDE project 16 – *A distinct service culture*).

Thanking should not be limited to responding to donations, but can be used more imaginatively, and strategically, to provide even better supporter care and recognition: for example acknowledging donors and sharing the positive impact they have had for their longevity in supporting, for particular giving milestones they may reach (for example on the anniversary of their first year of regular giving), for project successes, for emergency or crisis responses, for sharing the charity's story, for being active on social media etc. All are excellent ways of demonstrating just how much you value and appreciate those who give freely of their money, time, influence or resources to help you.

The importance of finding better ways of saying thank you and of welcoming a new supporter (links to CDE project 4 – *The supporter's journey*) to your charity simply must not be underestimated. At the most level, being thanked imaginatively, promptly and with integrity is the very least a donor should expect from you, given that this is the only thing they receive in return for making a donation.

In many respects, showing appropriate, genuine appreciation towards our supporters is more critical for the voluntary sector than for any other sector because our gratitude is often the only collateral we have to trade with. We must get even better at giving thanks and our aspiration should always be to be the best at it – bar none.

The following are the eleven main principles and recommended actions from the project findings, followed by the twelve key conclusions.

Principles and recommended actions for thanking & welcoming

1. The sector needs to take thanking and welcoming much more seriously, rather than continually paying lip service to this area of supporter care. Many donors giving smaller value gifts are excluded from being thanked, and often content of thanking messages is dull and uninspiring. Our own examination of over 200 thank you letters and e-mails (stretching back as far as 2008) showed large numbers of similar phrases being used over and over by charities. While none of these phrases are “wrong” per se, they are so overused that they have become completely predictable and no longer carry any major impact for supporters. This is further exacerbated for many donors who are generously supporting multiple causes and therefore seeing these phrases repeated many times over across acknowledgements from different organisations.
2. First-time donors should always be thanked for their gifts irrespective of the amount unless they have specifically asked not to receive an acknowledgement. If the amount is very small, a thank you should still be sent, but should explain that normally gifts of this level are not acknowledged due to the costs involved.
3. Acquisition materials should not include a tick box option for new donors to opt out of receiving a thank you. It prevents the charity from showing any appreciation for a first time gift, making the donor feel good about what they have done, demonstrating what a difference they can make and welcoming them to the organisation effectively. All are essential foundations of a good stewardship programme. In subsequent communications options for opting out of receiving a thank you may be feasible or even desirable for some organisations, with sufficient explanation and rationale of course.
4. All new donors should receive a Welcome Pack. This need not be expensive or overwhelming, but it should introduce the donor to the wider work of the charity and set expectations for how the donor can expect to be treated and valued by the charity.

5. New donors giving online should be given the option to get their Welcome Pack digitally or via the mail.
6. Existing supporters should always be thanked for their gifts, irrespective of the amount, unless they have specifically chosen or asked not to receive an acknowledgement.
7. Thanking could be much more imaginative than it is currently. There is an opportunity to use much more engaging content through better use of case studies, quotes, testimonies and images. Handwritten thanks should be used more often, and formats could be varied much more. Thank you cards, better digital content and telephone calls would all help make a thank you stand out and be more memorable.
8. Much better use could be made of the telephone for thanking supporters – both to say thank you quickly, but also to offer a far more personal and engaging acknowledgement for those donors who have done something particularly special, unusual or significant.
9. Digital acknowledgements should not just be limited to bounce-back receipt e-mails. These acknowledgements are an opportunity to provide engaging and involving content, which can be done easily and relatively cheaply.
10. Thanking should not be confined to donations. There is an opportunity to recognise donors for the length of their support, for anniversaries (e.g. In Memoriam recognitions), for campaigning, for volunteering, and even for things like informing the charity of a change of address. All of these are ways of making the donor feel valued and demonstrating excellent standards of supporter care.
11. This area needs far better measurements and key performance indicators. Rather than simply measuring the speed of sending a thank you, charities should also measure the direct costs of thanking and introduce a process for trying to evaluate the quality and impact of thanking as part of wider satisfaction measures (see point 7 in principles and actions section, page 19).

Conclusions

1. Overall, there was a slightly disappointing response to the project. Whilst one view may be that there is a continued apathy to the importance and value of thanking, it was clear from the responses we did receive that better appreciation of supporters at key points can go a long way to creating hugely positive and long-lasting relationships with donors.
2. In the majority of cases we reviewed through our mystery shopping, there continues to be a lack of imagination and effort put into most charitable thanking, with the approach generally being to take the path of least resistance – re-using or minimally updating existing letters, using basic bounce-back receipt e-mails with no follow-up, and rarely employing other formats and mechanisms such as cards with images or the telephone.
3. However, there is strong anecdotal evidence that high quality, inspiring content in all the main thanking mechanisms (online, print and face-to-face) can motivate supporters to become better advocates of the charity – sharing their stories and the charity's – and can often inspire them to give again as a result of their thank you.
4. Our survey revealed that only two thirds of charities said they thank new donors for every single gift. While we salute those organisations for their efforts and commitment to supporters, it also means a significant opportunity is being missed by the remainder. That is a large number of organisations who are failing to get relationships with new supporters off to a good start. We would strongly recommend reviewing any policy of this kind, and we certainly question the wisdom of any approach that excludes new donors from getting any kind of acknowledgement for their first-time support. Showing genuine appreciation for a donation, or any other kind of contribution, should be a basic tenet of any supporter care programme.

5. Are the short-term cost savings in not thanking supporters risking potential longer-term damage in terms of the relationship with these supporters? We are very concerned about the possible long-term consequences of many charities choosing to never acknowledge a gift of £5 or less, and around one in eight charities choosing to never thank donors giving £10 or less. This fails to take into account the donor's wishes or expectations and could easily be perceived as arrogant and unappreciative. The incentive for someone to keep giving if they never receive an acknowledgement of any kind, or learn how their gift is being used, is questionable at best. It is also entirely possible that a donor may be 'testing' a charity before committing to any further support, so the consequences of not thanking such donors could be potentially very significant.
6. Speed of thanking continues to be the main measurement used in terms of any quality control. Whilst turnaround times appear commendably quick, we do question whether this has sometimes become the main priority, to a point where quality is being sacrificed for speed. Clearly the ideal would be to thank donors promptly with high-quality content, but it should not be forgotten that the latter is certainly far more memorable than the former! Providing engaging, interesting and informative thanks should always be the primary objective of any acknowledgement process – even if mass produced.
7. Handwritten acknowledgements such as letters or cards, either written in full or simply topped and tailed, are appreciated by donors and considered to be much more personal. It can be the single most effective way of making a thank-you communication stand out and be more memorable from the donor's perspective.
8. The proportion of online thanking that consists solely of automatic receipt e-mails is disappointingly high, with the thanking survey showing that over half of all online acknowledgements are done this way. Our own mystery shopping exercises indicate that these are generally of much lower quality than bespoke thank-you e-mails and letters, and could potentially leave the supporter feeling very underwhelmed. This is an area that could be easily improved upon at low cost and with little impact on resources and time, but could greatly enhance the donor experience.
9. We were surprised by the survey finding that only a tiny proportion of charities thanking new donors online sent a digital Welcome Pack. Only 1% said they send an online version of a Welcome Pack, although 16% said that a Welcome Pack was sent via the post. Even so, less than one in five new online donors received any kind of dedicated welcome to the organisation. This seems like another missed opportunity for engaging new supporters with involving and inspiring content delivered quickly online.
10. We were also surprised that the survey suggested that a greater proportion of follow-up contacts to a donation online were delivered via print rather than digitally for both new and existing donors (23% to 22%), which also seems surprising and certainly more costly.
11. There is a great opportunity for more imaginative thanking that is genuine and authentic. It does not always have to be linked to a donation. We found some good examples of thanking supporters on specific milestones and anniversaries (for example, after giving a regular gift for a year or maintaining membership for five years, on the anniversary of an in-memoriam gift being received, or after a project has been successful or a particular programme goal has been achieved).
12. There is not enough measurement of thanking – in our survey fewer than four in ten responders actually measured thanking as part of any management information or key performance indicators, and over one third of responders to the survey had no idea what a thank you cost to produce. Speed is the main measurement used in thanking, and we believe much more could be done to more effectively measure the impact, benefits and costs of thanking supporters – particularly at a time when charity fundraising practices are under scrutiny like never before. Again, this seems to reflect the overall lack of value placed on this activity by the sector as a whole.

In addition to explaining and justifying the above principles, actions and conclusions. The full project provides several instructive case histories, plus links to a number of informative articles on thanking and welcoming, all with instructive examples and useful advice.

05

How to communicate at optimum, from the start

Project 05. The supporter's journey

Morag Fleming, April 2017
Reviewed by: Stephen Pidgeon

The original brief

Though each donor's experience will be different, mapping the optimum path over time can be useful for both the donor and the fundraiser, with potential if planned wisely to greatly enhance the donor experience. This project will define the process and seek to be helpful to fundraisers wishing to offer their donors a truly satisfying, rewarding long-term experience.

For senior management and trustee boards, this project will:

- Show why the journey of a supporter is important and why fundraisers must plan communications around a donor's motivations, identity and preferences.
- Help their understanding of why and how fundraisers use the supporter journey to better engage, inspire and delight donors.
- Explain the benefits that will follow when their charity plans better supporter journeys across all types of giving.
- Reduce the guesswork needed for their fundraisers to implement effective supporter journeys by explaining how to identify the needs of the donor.
- Show why the first 12 months is crucial and that investment in this area is essential for long-term fundraising success.

For donors, this project will:

- Increase the relevance, inspiration and engagement of content they receive from a charity.
- Reassure donors that their money is making a difference and that they made a good decision in giving.
- Reduce the chances of them stopping their giving through inappropriate messaging and communication.

Summary guidance

The supporter journey: A definition

While there's no universally agreed definition, a supporter journey can be described as the experience that a charity delivers to donors from the first moment of their support. The journey should also give donors the opportunity to increase their engagement, commitment and impact at specific points that are appropriate to them depending on their preferences and behaviour.

Practically, this is delivered by fundraisers using a roadmap of communications that should map the most appropriate touchpoints to communicate optimally with each supporter.

A good supporter journey will put the donor at the centre, and will include many pathways, recognising the donor's choice of channel, product, motivation and circumstances, and will allow a flexible, easy transfer to another pathway when the donor chooses to give in a different way, or to provide an easy exit when he or she no longer wishes to offer support.

A supporter journey should not be based solely on the entry point into the organisation, or solely on demographic information; instead, it should always aim to be relevant to the donors' motivations where possible.

The supporter journey is an opportunity for the charity to share stories, appreciation, and opportunities to become more or less involved. When done well, it can cement a lifetime of support and will yield financial rewards; however, if done badly, it can damage relationships before they are even established and result in low commitment and loyalty, which will impact on future levels of giving.

Stages of the Journey

The initial phases of a journey should aim to reaffirm that the decision to give is a good one, and to reassure and start to build trust; but, from the outset, the journey should engage donors in the way that is relevant to their:

- Reasons and motivations for giving
- Current life stage, identity and circumstances
- Preferences for channel, product and contact.

There are several stages that a journey can take, which can be roughly identified as:

- Thank you
- Welcome (0-3 months)
- Nursery (3-6 months)
- Retention (6-12 months)
- On-going

In addition, there should be journeys for specific ways of giving at a high level, for example Mid-Level, Major Donor and Legacy Donor, as well as community groups, event fundraisers and other areas of support. A donor should be able to cross over into a different journey based on his or her behaviour, life stage and commitment. The supporter journey should be a cross-team responsibility with consistent quality levels.

Priority, importance and investment

Interestingly, throughout the work on this project, we have found a distinct lack of case studies to present as examples. The assumption could be:

- Many charities seem to be in a state of redefining/reworking their journeys and few charities seem to be confident and happy with their journeys.
- Journeys are low priority in the same way that retention and long-term thinking are low priorities in comparison to acquisition and short-term income.
- Investment in resources is low due to difficulty in proving ROI.

There is a clear message for fundraising managers regarding investment, namely that is that the journey – particularly in the first 12 months – is as crucial to get right as is any acquisition, and should be a critical investment point. Whilst it is difficult to attribute ROI to a supporter journey, it is accepted in the sector that happier donors stay longer and give more. A good journey will enhance the experience of a donor and result in more loyal and generous supporters.

In terms of recommendations, the output of this report is intended to give fundraisers a strong place to start in terms of what needs to be considered rather than a framework to copy; at all stages, the journey should be as individual, specific and appropriate as possible. It should be as unique as the charity delivering it.

The *Supporter journey* project has been investigating supporter journeys within the sector and ways in which some charities are developing and delivering them.

The project's aim was to:

1. Investigate current thinking
2. Look at supporter journeys from a donor perspective through a mystery shopping exercise
3. Review some supporter journeys currently being delivered
4. To show how supporter journeys can be a great way to deliver a great supporter experience.

Based on the above, we then identified the principles that need to be taken into consideration when developing a supporter journey:

1. **Supporter journeys always have to be relevant to the donor who is on the journey.** There's a danger that organisational convenience will dictate the stages of a supporter journey, when what always has to be paramount is, what is best for the donor? One of the most important things to know to make a journey relevant is the reason for giving, which will not necessarily be the same for all donors.
2. **It's about how we make donors feel, not what we want them to have.** As the team at Ontario Nature show (see the full report), instead of the starting point being 'let's ask them to tell us something', the starting point is 'how do we want donors to feel, and then work out what materials or touchpoints might achieve that'. Suddenly, 'let's send a survey because we think we should' becomes 'we want our donors to feel we are interested in their opinion. How do we do that? Let's send them a survey'. See also project 06 – *The use and misuse of emotion*.
3. **Always be authentic and genuine.** The primary purpose of your supporter journey is to delight your donors, not to raise short-term money. Delighted donors will stay longer and give more in the long term. Any supporter journey that has a ROI attached to it is not in the best interests of the donor because the objective becomes about income instead of the donor experience.

- 4. Invest in the supporter journey to ensure that donors have an excellent experience, not only in the early months/ first year when it is particularly important, but also throughout their time as a supporter.** The cost of initiatives such as those described here will be more than recovered via higher retention rates of happier donors. This requires a long-term view and corners should not be cut, as this could compromise quality or affect income generation. The supporter journey collateral should be seen as valuable as income generating/appeal collateral, and should be afforded an adequate budget and resourcing as an investment into retention and future income. See also, CDE project 04 – *Thank you and welcome*.
- 5. Engage with the rest of your organisation to get access to amazing stories to tell your donors.** Programmes and service delivery teams are your gateway to gathering emotional and engaging stories that are crucial for your supporter journey. Have a plan to inspire and engage the rest of the organisation in what you are doing and why. When programme staff are aware that they share values and passions with donors who wish to achieve the same vision, stories can emerge that can connect donors more closely to beneficiaries (see the Ontario Nature case study). A good donor journey will be one that brings the donor and beneficiary closer together for a better experience (see the VSO case study); often, this will only be made possible through engaging with staff outside the fundraising team. See also CDE project 01 – *The use and misuse of language*.
- 6. Identify which donors or group of donors you are going to include in your supporter journey.** The journey needs to be relevant to each group of donors. Therefore, begin with your next recruitment campaign and work out from there. Think beyond the acquisition method and start to look at different groups of donors based on other metrics that are more meaningful. Test segmenting donors according to what they value, what they are interested in and how they want to interact with you. Don't be afraid of 'allowing' donors to ask for a lighter touch, as this can be equally important when developing relationships.
- 7. Make sure that you have the tools and processes to manage the donor communication preferences.** Record 'opt in' and 'opt out' carefully and, within Data Protection laws, have multiple channels in your supporter journey so that you can still contact donors if they opt out of one channel. Always give channel choice where possible and then act on that. Be realistic, but be consistent according to your capabilities and resources. Remember to always keep your supporters in control of what they are receiving.
- 8. Tell your donors a story that continues across the journey.** Make your initial early stage supporter journey communications relevant to the message used to recruit donors and build on the story as you progress. Until you know your donors and their preferences a little better, don't confuse them with everything you do; equally, don't assume that a donor will not want to have a broader knowledge of your work. Determining donor motivation is essential to tailor the on-going story.
- 9. Don't always ask for something.** Include plenty of thank-you messages, updates and non-ask actions to keep your donors interested. Remember that a donor may not differentiate between a thank-you mailing and a direct ask, so make it very clear from the outset that the communication is not asking for money. Non-ask pieces should avoid even soft asks (for example, a newsletter with a donation form is NOT a non-ask piece).
- 10. Ask your donors for feedback about how they feel about your supporter journey.** Find a way to get feedback from your donors (telephone, email address, questionnaires) and be sure to act on what they tell you. See also CDE project 03 – *Satisfaction and commitment*.
- 11.** While it may not always be possible to show the benefits of good supporter journeys in direct return on investment improvements, there is growing evidence that net income will be increased over time. See the main project.

Some additional reading materials can be found here:

1. Relationship Fundraising: A donor-based approach to the business of raising money by Ken Burnett
2. How are you managing the donor journey? by Tony Elisher – 101 Fundraising <http://101fundraising.org/2013/08/how-are-you-managing-the-donor-journey/>
3. The Donor Journey Pocket Guide by Rogare
4. How to love your donors (to death) by Stephen Pidgeon
5. Relationship Fundraising, where do we go from here? Volumes 1 to 4 by Adrian Sargeant, Rogare
6. The Supporter Journey – myth or reality? Think Consulting Solutions <http://www.thinkcs.org/supporter-journey-myth-or-reality/>
7. The User's Journey by Donna Lichaw



How emotion, used wisely can greatly enhance the donor experience

Project 06. The use and misuse of emotion

Ken Burnett, April 2017
Reviewed by Matthew Sherrington

The original brief

Fundraising is inevitably emotional and emotion is hugely powerful, so must be used responsibly and wisely. This project will consider whether and how emotion can be safely used in fundraising communications. It will define the opportunities and responsibilities that come with telling the truth well, with power and passion that can move people to action. For full details of this project's six main sections see [SOFII here](#).

For senior management and trustee boards, this project will:

Show why emotion is at the heart of fundraising and why fundraisers must understand and use it responsibly and effectively, to improve their donors' experience.

Help their understanding of why and how fundraisers use storytelling and why they tell their stories in the way they do, to better engage, inspire and delight donors.

Explain the benefits that will follow when their charity begins to tell its stories better.

Show how it will repay investment to equip staff properly in emotional storytelling.

Show why their fundraisers should embrace the 5Fs and be famous for frequent, fast, fabulous feedback.

Help the charity's leadership to become an emotional board.

Introduce them to a range of inspirational aspects of the use of emotion.

Help them to recognise and avoid misuse of emotion in their organisation's communications.

For donors, this project will:

Increase the care, comprehension and competence that fundraisers will bring to their job of communicating with donors.

Increase opportunities for donors to be inspired, engaged and entertained when they hear from a charity, with more appropriate and better presented content.

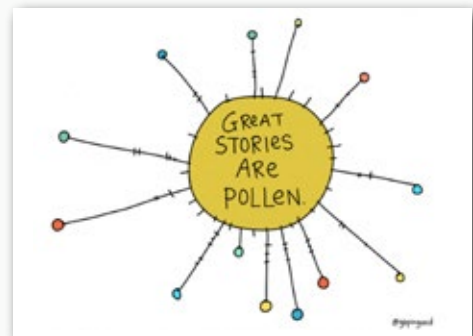
Reassure donors that, when they hear from fundraisers, their best interests will be at the heart of each contact.

Reduce the chances of donors being made uncomfortable by the misuse of emotional messaging.

Help to improve the content of each communication that they receive.

Main recommendations, big issues and questions

1. ***As driven by emotion, not rational thought or argument, fundraisers, particularly fundraising leaders, should give the use and misuse of emotion the priority it deserves.*** Charities urgently need to encourage their fundraisers to learn to use emotion properly and to invest appropriately and sufficiently in equipping their fundraisers via the right immersion and training in emotional fundraising. However, has the 'let's-change-the-world-for-the-better' sector got the collective capacity, unity and commitment to make this happen?
2. ***The change in fundraising's culture cannot succeed unless it is led by and involves the right people.*** The emotional fundraiser is a different breed from some who has come to represent our sector in recent decades. Rather than a sharp sales professional, he or she is a passionate believer in and advocate for the cause and an inspiring, consummate transformational storyteller. Fundraisers should be recruiting the right people now. See CDE project 14, *Getting the right people as fundraisers*.
3. ***Fundraisers should show they know the importance of emotion and fight for using it correctly.*** Emotion should be at the core of fundraising communication and fundraisers need to be experts in it. They must demonstrate that they understand the subject and know how to use their knowledge to improve the donor experience. The public has a right to expect that fundraisers be fully equipped for and expert at the subject. So, can emotional fundraising become a top priority, featured creatively at fundraising conferences everywhere?
4. ***Listen to the experts and bring them in to join us.*** The well-intentioned amateur must become a thing of the past. Fundraising campaigns and causes need to work with enthusiastic, appropriately qualified and donor-centred behavioural scientists with the skills, training and insights to lead fundraising into its donor-led, emotionally charged future.
5. ***Responsible use of emotions, always.*** Donors fear emotional manipulation from fundraisers; therefore, they need to display evidence of consistent integrity in how they use images and stories, backed by understanding of the effects their use have. It is about the truth, told well, and not how much more money this will raise. Misuse should not be tolerated. But, can fundraisers be trusted to do this right?
6. ***Fundraisers can and must shape public attitudes through emotional fundraising.*** It is time for fundraisers to unite to make the differences they want to see. Fundraising and campaign communicators can lead on big important issues, so influencing good can be discussed rather than just raising funds for the changes society needs.
7. ***Fundraisers should show emotional intelligence, that they can deliver meaningful, emotional content that reinforce donor loyalty and commitment without spreading anxiety and discomfort.*** This is the largest anxiety from the perspective of the donor. Being a donor must always be a pleasure. Fundraisers have a duty to bring joy, meaning and fulfilment to their donors. They will not succeed at this unless they master emotional fundraising and do so in ways that their publics recognise, appreciate and respect. [This project shows how this can be done.](#)

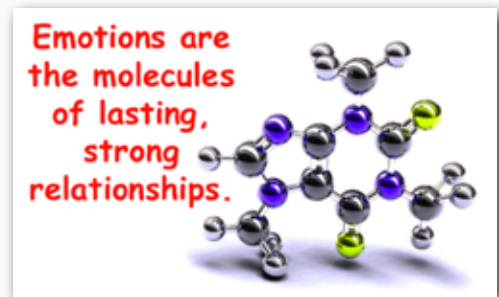


What matters most in emotional fundraising?

- **You.** The key component in emotional fundraising is you. Be yourself.
- **Be true, feel it and mean it.** Show your passion proudly. Put donors rather than targets at the heart of your fundraising. Represent your donors steadfastly internally and externally. Create, project and protect the emotional experience you want your donors to have. Matthew Sherrington likens the ‘catching’ effect of emotion to yawning. When you find it in yourself and express it passionately, people will feel it.
- **Think deeply and act wisely.** Become expert at empathy and rapport and at delivering emotional reward for donors. Develop a new set of skills to match and master the potential of emotional fundraising.
- **Never forget what donors really don’t like.** The emotional fundraiser is never out of step or tune with his or her donors. Cultivate empathy and rapport, practice reciprocity built upon permanent, automatic sincerity and integrity, all wrapped genuinely and perpetually in appropriate emotional stories.
- **Be the business area with the highest standards** that always does the right thing not just by its donors and beneficiaries but also by its staff, volunteers and by all its publics. The fundraising sector must lead the way in ethical business practices. It must see its role is in making donors both happy and reassured.
- **Listen well and keep learning.** Be the best-informed emotional fundraiser of your generation. Make sure your organisation ‘gets’ emotional fundraising and invests in it and develops its staff appropriately, consistently and well.
- **Have real conversations.** Scrap pre-set scripts and sales objectives to become a great emotional storyteller focused on donor delight, not financial targets.

How to use this project, with links

For those keen to master emotional fundraising this project has six sections to help you to access all the content in CDE project 6, *the use and misuse of emotion*. To appreciate the foundations on which this summary’s conclusions are based, please study all the six following sections. If your time is limited, focus just on this summary, the introduction and section 6 (which also includes the points in this summary, slightly expanded and ordered differently).



1. For a broad introduction to the project and some of its key conclusions, see the contents and summary in this section and section 1, the introduction.
2. For examples of emotional communications and something regarding their structure and design, see section 2, the showcase of emotional fundraising.
3. For a deeper understanding of what emotions are and how they work, see section 3, the science of emotions.
4. For insights into how donors perceive and interact with emotions, see the individual components of section 4, donors and emotions.
5. For more on the art and craft of inspiration and how emotions can help you in your fundraising, see the contributions that form section 5, the creative use of emotion.
6. For convenience, the 72 key points drawn from all the above content are listed in the next section.
7. For a view of the future development and direction of this crucial subject for fundraisers, see *the shape of emotional fundraising 2017*.

72 key points and helpful hints for fundraisers, from this project

Collectively, these answer the question, ‘What do I and my colleagues need to do to be the best that my charity can be, in this area?’ They are grouped under four headings: fundamentals of emotional fundraising, communication and inspiration, the power of emotion and the right people, doing the right things by donors. These are somewhat arbitrary; consequently there is some overlap.

Please note: These 72 points have been edited or précised from the 30+ components that form the main content of CDE project 06. Text in quotes indicates something taken from one of the 27 contributors. Care has been taken to preserve meanings, but lack of space in the summary prevents full attribution of the quotes here. A list of contributors can be found in the contents list and in the introduction, and all quotes are attributed in section 6, where an unedited version of the 72 points is also included.

Fundamentals of emotional fundraising

1. ‘Emotion plus integrity equals great fundraising.’ For fundraisers integrity is essential, not optional.
2. The concept of ‘the truth, told well’ should run through the DNA of every donor-focused fundraiser.
3. Emotional leadership built around a great WHY can transform both the donor experience and the fundraiser experience.
4. You’ll know you are donor-centric when you stop saying, ‘we do this’ and start saying ‘this is what you make possible’.
5. ‘People do not necessarily give where the need is highest, but they give instead where they have an emotional connection.’
6. ‘It is stories and their emotional content that activate the predisposition to donate, not creative messages, statistics, the brand, or the logo.’
7. ‘If you try to shock for the sake of it, people see through it. If what you say shocks and is based on honesty and truth, it rises above.’
8. ‘We will fail if we are not prepared to get it wrong.’
9. ‘Articulating the difference a supporter can make is as crucial as the emotional story itself.
10. ‘We must understand our message and our audience and have the courage to tell the truth, however painful and uncomfortable.’

Communication and inspiration

11. Fundraisers must get better at inspiring. Powerful, truthful emotional content engage and bind donors willingly to your cause, giving them as much in return as you ask from them, in regular or single-gift support.
12. The impact of a donor’s gift is perhaps the best emotional story you will ever get to tell. Fundraisers have to tell it unhesitatingly, well and often.
13. ‘Information is putting out, communication is getting through’. Most organisations produce too much information and too little communication.
14. Make the case for support short, perfect, unarguable and available, but not prominent. Keep it subordinate to your great big emotional WHY.



15. Though our sector has yet to realise it, logical rational analysis is more likely to cause donors to stop giving rather than encourage them to start.
16. Charities spend too much effort explaining what they do in charts, diagrams, statistics and dense text. It is better to focus on emotional stories about what their donors enable them to do.
17. Pursue the policy of '5 Fs' – be famous for frequent, fast, fabulous feedback.
18. 'The big problem for hospices is being so scared of misusing emotion that they shy away from telling the truth in the first place.'
19. Fundraisers should be storytellers rather than salespeople. HR people should focus on communications skills ahead of marketing qualifications.
20. 'Personal stories are priceless, feedback is vital and thank you goes a long way. Listen well and celebrate what we have achieved together.'
21. Donors want plain, straightforward writing. Competence, not cleverness. They want the deeply moving and the essentially true.
22. Start an online story bank, promote it widely and make sure it is used.
23. Keep it simple. Resist the sterile reporting favoured by NGOs. Use the plain conversational language that people hear every day.
24. Because we have to tell our stories well to passionately move people to action, we need to know that comfortable people tend to do nothing.
25. 'Photos of sad kids raise 50 per cent more than photos of either happy kids or neutral kids.' Worth knowing, that is.
26. 'Communications that create fear and anger will drive action, but long-term commitment requires potent means to tackle these negative emotions.'
27. 'People are more likely to be persuaded by those who make them feel good about giving. Endorsements from people they trust can be powerful.'
28. 'Generating guilt is a short-term strategy. Guilt initially makes people feel sad which they resolve by giving. But this turns to anger if over-used.'
29. Fundraisers need to learn the art and craft of writing drama.
30. Bring the problem close to home. 'One needy individual next door = 100 needy people in Manchester = 1,000 needy people in Madagascar.'
31. 'People are willing to go beyond reality for entertainment, though seem less likely to take anything from charities but the whole truth, nothing but.'
32. 'No fundraiser should ever face having nothing to say. This happens when a charity is driven by a window of opportunity, such as a deadline.'
33. 'We should try harder to get our beneficiaries to speak directly to our supporters. Beneficiaries are authentic experts who people will listen to.'



34. 'Donors give money to make the world better - we just enable that to happen.' No one gives for things to remain as they are.
35. 'The most effective stories that we have at the hospice have been those told by families in their own words.'
36. 'It's not our job to whisper to our donors ...did you give that donation because you understand the root causes of poverty? Or did you just feel your heart go out to a helpless little child?'
37. 'Was I objectifying him? Was I using his looks to attract support and generate extra cash? Well, yes. Does that make me a bad person? No!'
38. 'Fundraisers must bear witness so the truth can be told, for people who may never have seen a refugee camp, never sat next to a woman whose child is dying in her arms....'
39. Sometimes it is possible to capture your WHY in a single phrase or sentence. See the starfish story in section 5.2.

The power of emotions

40. 'A strong emotional experience stays in the memory and influences later behaviour.' Emotional fundraising is no less than the route to retention.
41. Finding your organisation's WHY is about 'wow!' rather than 'so what?' It shows that people do not buy what you do, they buy why you do it.
42. 'Emotional connection is essential to any successful fundraising programme.'
43. Emotional fundraising is healing and very unifying. Nothing unites fundraisers and donors more than a strong, compelling emotional WHY.
44. 'Just six core emotions, and only these six, are those that really matter in activating people and igniting behaviour such as the action of donating.'
45. 'The key for a healthy and long-term sustainable relationship with donors is emotionally satisfied donors – more valuable than rationally satisfied.'
46. Emotions associated with bad service can last significantly longer than emotions we would associate with great wow moments.
47. 'The mere act of helping produces an inner satisfaction, a sense of 'warm glow'. The knowledge that your donation has had an impact, that it changed a person's life, is what transforms this to happiness.'
48. 'Donations to a collection tin went up 14 per cent when the word 'helping' was added but shot up 90 per cent when that was changed to 'loving'.'
49. Consider adopting the slogan, 'Donors do make a difference'. Afterwards commit all your people to collecting and crafting stories that prove the point. When you have done that, try the same idea with 'the joy of giving'.
50. 'Using negative emotions such as guilt doesn't encourage long-term giving. Instead it is 'reward emotions', that enable people to enjoy giving and therefore provide the encouragement to do so. The mistake charities make is that they keep going out with the need emotion, because it works short-term, but they do not place enough emphasis on the reward emotions.'

The right people, doing the right thing by donors

51. Charities should develop, publish and live by their own tailor-made covenant with donors. See <https://goo.gl/3qEX5I> for suggestions.
52. 'Stop treating all people the same. For outstanding donor experiences, start seeing donors as people rather than trying to fit them into categories.'
53. 'Listen to donors, they all have a different emotional reason for giving. There's no script for life, so conversations shouldn't be scripted either.'
54. 'Put the feeling into your fundraising, and asking for money is the last thing you'll do.'
55. 'Investing in the people who actually speak with your supporters is crucial. If you aren't, you're not investing in the best experience for donors.'
56. You must be the change you want to see. Remember these ten two-letter words – 'if it is to be, it is up to me.'



57. Charities need to work hard at making their board of trustees an emotional board.
58. A brilliant creative communicator excels at times of change. When everything's steady or settled, an efficient but stable manager is better.
59. Stand up if you're a fundraiser! 'It should be about everybody feeling they have a role, that fundraising is right at the heart of the organisation.'
60. 'Bridging the empathy gap could be effectively achieved through a coalition of organisations jointly promoting a campaign or giving vehicle.'
61. 'Ask yourself what you can do to become a more emotionally intelligent fundraiser; a more open hearted leader'.
62. Fundraisers in public places should have a sign on their backs saying, 'How's my fundraising?' with a number to call similar to HGVs and trucks posting a sign saying 'How's my driving?' Donors would love this.
63. 'People want to feel good about giving to know they've made the right choice, that they are recognised and connected to like-minded people.'
64. 'People often give to prove they are 'good'. Do not confuse this desire to look and feel good with connection to a cause.
65. 'The thank you is the key part of any fundraising programme. If the recruitment device is the 'box', the thank you piece is what's inside.

66. 'Poor treatment such as getting someone's name wrong impacts on a donor's self-worth. Thinking they don't matter creates negative thoughts.'
67. 'Avoid donor regret (giving remorse) by addressing donor needs after a donation.'
68. 'When someone appears unsure about giving, it is because they don't feel emotionally close enough to give.'
69. 'When donors first give, make the charity accessible to them. Welcome and reward curiosity.'
70. To help turn your board of trustees into an emotional board, 1) start each meeting with a mission story, 2) set up a 'guest at table' scheme, 3) encourage trustees to visit projects and on return get them to tell an emotional story, and 4) decorate your walls and any other available space with emotional images and captions that tell your cause's story. If your board members are not natural storytellers, train them.
71. 'We need to give our donors an emotional journey, simply and honestly told, to help them understand why a hospice contains a million emotions but above all is a place where hope can thrive.'
72. Think big/inspire before asking. 'We said we weren't there to talk about money...' See how a \$27.1 million gift was secured from a bankrupt prospect through the judicious use of just the right amount of emotion.

**Sincerity: honest,
frank, genuine. Free
from pretence or
deceit. Clean, pure,
believable.**

Concise Oxford English Dictionary



Inspiring the people in businesses for strong partnerships

Project 07. Companies

Jonathan Andrews, February 2017
Reviewed by: Mike Kelly

The original brief

Fundraising with companies has evolved beyond asking for donations. Charities working with companies today – be they large national or international companies or smaller regional businesses – are more likely to seek partnerships that include shared values and mutual benefits. These can lead to more durable, stronger and often higher financial value partnerships. Some partnerships can last years and some include expertise that a charity may need. This project will consider all aspects of this evolving field of corporate partnerships from the perspective of the donor - including directors, senior managers, selection panels and staff to identify ways of enhancing the experience to the benefit of all involved. Corporate partnerships may include donations, sponsorship, expertise, employee fundraising, mass participation events fundraising and income from merchandise.

For senior management and trustee boards, this project will:

- Show why focusing on partnerships is the best way to engage corporates in supporting your charity.
- Based on this, the board should encourage a partnership culture in their organisation.
- Help the charity's leadership to identify the organisational challenges that corporates can help with.
- Explain why it is essential that an ethical policy is in place before undertaking any corporate fundraising.
- Show why demonstrating impact and thanking corporates as well as you would thank individual givers is crucial to sustainability.

For donors, this project will:

- Reduce the chances of corporate partnerships failing due to unrealistic or un-aligned expectations.
- Increase the focus on creating mutually beneficial partnerships that also recognise the company's objectives and challenges. It will seize the opportunity of 'social purpose'.
- Show they are appreciated through appropriate thanking and impact reporting.
- Inspire the decision makers and connect people at the right levels of the organisation.

Summary

Corporate partnerships are a huge opportunity for charities right now. This is because issues of trust, social purpose and employee engagement are increasingly important to companies.

Charities will only make the most of this fantastic opportunity if they deliver an excellent experience for the company decision-makers and employees. As Mike Barry, Director of Sustainable Business at Marks and Spencer, says, “We need to master the art of partnership forming”.

In simple terms we need to be Partnership Focused. This consists of three essential elements:

- **Company focus:** Really understand what the company wants.
- **Inspiring:** Engage company decision-makers and employees emotionally.
- **Partnering culture:** Ensuring the whole charity is on board with corporate partnerships.

The following actions describe what you can do straight away and in the future.

What can I do straight away?

(Listed in order of descending priority.)

1. **Involve key colleagues from the start.**

Identify colleagues such as media and services that are essential to help create and deliver corporate partnerships. Involve them when you develop partnership opportunities, identify target prospects and take them to meet the companies. Getting your colleagues on board will have a huge impact on the success of your corporate partnerships.

2. **Find out your biggest organisational challenges that aren't money.**

Book an hour with your Chief Executive and ask them to share where the organisation wants to be in five years' time and the biggest challenges, beyond money, that will prevent you from getting there. These challenges will help you build powerful corporate pitches.

3. **Create a partnership-focused strategy.**

Create a simple strategy that communicates your vision for corporate partnerships and the huge impact they can make on your cause. Create a section called 'interdependencies' where you list your key internal colleagues. Meet with these colleagues, share your strategy and what you need from them and ask what they need from you in return.

4. **Develop a robust & simple ethical policy.**

It is essential that your charity makes good decisions about which companies it will and will not partner with. Develop a robust and simple ethical policy based on the [code of fundraising practices](#) as detailed by the Institute of Fundraising.

5. **Understand the company's objectives and challenges.**

To create a real partnership you have to understand each other. How can you get to know the company and the key decision-makers, even before you meet them? What are their objectives and challenges? Look at their website and social media and use your findings to inform how you approach your first meeting.

6. **Inspire the company's decision-makers.**

Companies choose charities for emotional reasons, then they justify their decision with commercial benefits. It is vital that you engage the decision-makers emotionally. You can do this by sharing a powerful story or giving them the opportunity to see your cause first hand.

7. **Help the company with one of their big objectives or challenges.**

How can you help the company decision-maker with one of their big objectives or challenges? You have lots of value to offer companies. It could be expertise, engaging their employees or generating positive publicity.

8. **Make value the goal of your partnership.**

Set a goal for your partnership that's greater than just gaining money. If you just focus on money you risk upsetting the company decision-makers who do not like to be treated as big bank accounts. You also exclude ways the company could help you that could be truly transformational. Share one of your organisation's big challenges that the company is in a position to help with, and ask for their help in a way that uses their greatest expertise and assets.

9. **Call it 'Corporate Partnerships' not 'Corporate Fundraising'.**

Partnering with companies is a huge opportunity for charities, but it is important that you describe and approach them as 'corporate partnerships', not 'corporate fundraising.' The former is done with the company, but the latter is done to the company.

What can I do in the future?

1. **Develop a partnership culture.**

To develop and grow successful corporate partnerships, it is essential that your whole organisation is on board. Ultimately you want to develop a partnership culture where your whole organisation sees the opportunities provided by your corporate relationships. As Ben Swart, Head of New Business at NSPCC says, "Two thirds of my job is convincing people internally. So I treat my colleagues as key customers".

2. **Deliver on your promises.**

Successful partnerships are built on trust. The best way to build trust is to do what you say you are going to do. Develop partnership objectives that clearly state what both partners want to achieve, then make sure you deliver on those objectives.

3. **Connect senior with senior.**

Senior decision-makers in companies expect to meet with senior decision-makers in charities. Make sure they have the chance to meet and build this relationship. A very senior relationship can be hugely valuable when you want to pitch new opportunities and when problems occur in your partnership. See CDE project 15, *The role of trustee boards and senior managers*.

4. **Develop relationships at all levels.**

How can you engage employees at all levels of the company? What volunteering and fundraising opportunities can you offer? Wider and deeper engagement with the company's employees will increase the benefits, impact and longevity of your partnership.

5. **Seize the opportunity of 'social purpose'.**

Social purpose is where companies and/or brands put their greater purpose at the heart of their strategy. It is growing in importance for UK business, with approximately 30 of the FTSE 100 taking this approach. This is a big opportunity for charities because it means that being and doing good is essential for business success. Make sure your approach to a company is aimed at the heart of their social purpose..

6. **Show them the impact.**

The greatest motivation for company decision-makers and their colleagues is to see the impact they are making. Find different and creative ways to communicate this inspiring information. If they helped you to build a new school in Africa, show them a picture of the inadequate old school next to the impressive new one.

7. **Tell them how important they are to you.**

Senior decision-makers in companies are human beings. It can make a big difference when you tell them how important they are to you. Send them a special thank you from one of your beneficiaries or better still give them a framed photograph and message from one of the people whose life they have changed. See CDE project 4, *Thank you and welcome* for ideas that can be adapted for use with companies.

8. **Put a partnership agreement in place.**

Company decision-makers sometimes perceive charities as not being very professional or commercial. Having a partnership agreement in place helps dispels this myth. It also protects the interests of both partners. The process can be daunting on your own, so ask other charities if they can share their approach and template agreements.



Getting it right and delighting trusts and foundations

Project 08. Trusts and foundations

Deanna Wolf, February 2017

Reviewed by: Julie Christie

The original brief

Trusts and foundations are significant donors to charity but while most operate in ways substantially different from individual donors they have distinct needs in terms of requiring an exemplary and rewarding donor experience for trusts and their staff. This project will seek to define the best ways to deliver that experience for any trust or foundation.

For senior management and trustee boards, this project will:

- Show why it is important to research trusts and their trustees, so common ground and interests can be identified.
- Help their understanding of how trusts vary in size, composition, purpose and value and why a 'one-size fits all' approach is unlikely to achieve a good return.
- Explain why it is important to respect the guidelines provided and to write quality applications for quality projects.
- Demonstrate the importance of reporting back on how the gift was used and the impact it had.

For donors, this project will:

- Improve the relevance and quality of funding applications they receive.
- Show they are appreciated through excellent reporting and thanking processes.

Summary guidance

Operating in ways substantially different from individual and corporate donors, trusts and foundations have distinct needs in terms of requiring an exemplary and rewarding donor experience for trusts, trustees and their staff. Where they are available, guidelines, applications and reporting requirements paint a fairly clear picture of what many trusts and foundations want. If we meet these expectations, we will automatically be providing them with an excellent donor experience. Or will we?

The basic skills of fundraising from trusts and foundations remain the same regardless of a fundraiser's experience or approach and are not the focus of this guidance. As the backbone of good trust fundraising, these skills are outlined in detail in many other fundraising resources and should definitely be used to help achieve a positive experience for our donors. But perhaps these practices, guidelines, processes and requirements are not the destination we should be aiming for. They are the starting point, along with a shift in our collective attitude toward our potential donors.

The emphasis needs to be on how we can ensure the continuing goodwill of our donors. We must ensure that the processes we go through as applicants and as funded projects provide them with excellent experiences of their involvement in contributing to our causes, as well as recognise the very important role that they play.

Principles – Attitudes and Assumptions to Adopt

- First and foremost, a positive donor experience is not about what the donor can do for our charities, but what our charities can do for them. This isn't saying we should replace our charity's goals with those of the donor. Rather, we should be more aware of our donor's motivations and interests and work to find our common goals. What do they want to achieve, and what can we achieve together?
 - > Do your research and find out as much as you can about the trust and its trustees. Who have they funded previously? If your goals are aligned and you approach them, tweak your application – if you are using a base case for support – to the trust. Sometimes even a single sentence will let them know that you were thinking specifically of THEM when you wrote it.
- Across the country, indeed across the world, there is as much variety in size, composition, purpose, value, and management of trusts and foundations as there is in the charities and organisations which seek their support. There is therefore no single step-by-step approach that will suit all trusts and foundations. Although there are some general similarities in the sector, a case-by-case approach must be taken with each trust or foundation. Do not assume that what works in London will work in the rest of England or in the other Nations. Do not assume that it won't.
 - > Use the guidelines, talk to others, and more importantly pick up the phone. Find out what the trust wants and adhere to that. If they want minimal or no communication, respect that. If they want a detailed report, provide that, regardless of their donation size, and without complaint. If they do not say either way, deliver at least a basic report which tells what happened, who benefited and how, and be appropriately grateful. Follow their guidelines on press involvement. Invitations to events or launches may or may not be acknowledged or accepted; in my experience this really is dependent on the community and location within the UK. Abide by their decisions and learn from them for future interaction.
- Trusts and foundations are not nameless, faceless corporate bodies. They are managed by busy people, often themselves volunteers, and are trying to fulfil the vision, wish, dream or passion of their founder and/or their current trustees to do something to make the world a better place. As charities, we can help them realise this goal if our own is in alignment.
 - > The funds that a trust is giving to you come from the founder; the trustees that control those funds do so with that specific purpose. If your project is too 'round' for their 'square' guidelines, move on to another funder. If you are in alignment, follow best practice in all aspects of the application and grant management process, deliver on your promises, and remember and accept that whilst your charity may be the expert in delivering services to a particular group that does not excuse your charity's benevolent or fundraising activities from scrutiny. Be willingly transparent.

- Trusts and foundations do not exist for our convenience. Their only responsibility is to deliver their charitable objects as set out in their governing documents. However, whilst it is not their responsibility to design their processes to meet our requirements or make our lives, as fundraisers, easier or harder, many trusts acknowledge that the relationship they have with applicants is symbiotic and they are trying to make the process if not easier, at least potentially more streamlined (e.g., the work being carried out by the Scottish Funders' Forum).
 - > It can be frustrating when a trust's guidelines or requirements do not easily fall in line with our timetables and financial demands. Nevertheless, do not forget that the trust and its trustees or representatives are as important a part of the **fundraising equation** as the charity's beneficiaries – albeit in different ways. Do not let them be sidelined in the quest for money to deliver your charity's aims and goals. Without them, you will struggle. Finding a range of appropriate and interested funders to cover all aspects of our financial need is **our job**. Trust fundraising is not rocket science, but no one ever said it would be easy.
- Respect and honour the trust or foundation, their staff and volunteers, and their guidelines. NEVER forget that it is not YOUR money you are spending, it is THEIR donation.
 - > Never forget that the grant you have been awarded is a **gift**, not a loan, not a random payment. Be gracious and communicate how it is being used or if there are problems. Regardless of how worthy and necessary the work of your charity, understand that you are one of many such charities. The trust, its trustees and volunteers do not owe you anything.

Practical Donor-Centric Actions – Not Trust Fundraising 101

For most of us, I believe that adjusting our trust fundraising practice to be more donor-centric is largely to do with our attitude rather than significantly altering daily tasks or processes. However, acting to acknowledge and meet the basic elements of these four categories will go a long way toward an excellent donor experience.

- *Maintain and improve your own fundraising practice and skills:* Trust fundraising is not simply writing and submitting bids. There are many online and literature-based resources available giving trust fundraising basics, tips, and tricks as well as regular courses and conferences. Do your research and take responsibility for your own practice.
- *Follow the guidelines provided:* If there are no guidelines, concisely and clearly answer the basic questions (where, why, what, when, who, how, and how much).
 - > Do your research. Make sure you meet their criteria. If you do not meet it, and you do not have a pre-existing relationship or research to the contrary, do not apply.
 - > Remember that sometimes it is about the relationship and sometimes it is not.
 - > If in doubt, contact the trust by whatever method possible.
- *Submit quality applications for quality projects:* Your well-written, accurate application should be on time, as requested and deliverable.
 - > Recognise that whilst it may be symbiotic, the relationship between trusts and applicants/awardees is unequal. Resist exaggerating needs or methods, or over-extending capabilities, capacity or outcomes in order to secure funding. This can only lead to disappointment and possible reputational damage for everyone involved. Realistically and practically, “under-promise and over-deliver.”

- *Engage in effective stewardship and relationship-building:* Do not forget to be grateful and be sincere in a timely manner. Follow the trust's wishes regarding levels of communication and interaction / relationship-building.
 - > Report back on time, honestly and at a level the trust/trustees will find appropriate.
 - > If suitable, invite trustees and trust staff to see services in action or to a stewardship event. Accept that they may not engage.
 - > Involve your Chief Executive, key operational staff, and maybe beneficiaries in the relationship you build with the trust.
 - > If the trust does not want a relationship, respect that.
 - > Be upfront and proactive if things aren't working in your funded project.
 - > If acceptable to the trust, keep in touch between applications and projects.
 - > Leave an accurate and comprehensive record of the relationship between your charity and its donors for your successor. Think about what you would want left for you.
 - > Say thank you. Honestly and sincerely. This cannot be re-iterated often enough.



21 actions to improve the major donor experience

Project 09. Major Donors

Angela Cluff, March 2017
Reviewed by Di Flatt

The original brief

High net worth individuals are increasingly addressed by charities as a distinctly different group of donors requiring individually tailor-made cultivation and development plans. This project will look at what's cutting edge in major donor development with a view to capturing these lessons and where appropriate suggesting how major donor experiences might be applied to other groups of donors too.

For senior management and trustee boards, this project will:

- Show why major donors should be seen as partners in a shared mission and not just funders. They should be clear on what a major donor is to their organisation.
- Help them decide on whether major donor fundraising is right for their organisation.
- Recognise that major donors may want to have relationships with them and other non-fundraising staff and volunteers. Boards and senior management need to demonstrate leadership and ensure that people are aligned on organisational direction, strategy and priorities.
- Show why it is crucial to invest in staff retention to minimise major donor fundraising staff turn-over.

For donors, this project will:

- Increase the quality of approaches they receive from charity's and make them feel partners in the mission.
- Show how their story fits with the organisation they plan to support.
- Increase the gratitude and recognition (as appropriate) they feel as a result of making a gift.
- Make them feel respected and valued through the establishment of authentic relationships. These will acknowledge the donor's preferred style and method of communication.

Conclusions

Implicit in the project description is the idea that major donor fundraising is by its very nature donor centric – and therefore can offer learning for other areas of fundraising, especially mass market fundraising.

The first – and possibly challenging – conclusion of this project is that the donor experience, even for major donors, is not universally good. While there are brilliant examples of exceptional experiences, I have also heard many examples of experiences that have left major donors disappointed, disillusioned and, in a few cases, angry. Of course, major donors, like all donors, share both their positive and negative experiences of charities with their friends and peers.

Major donor fundraisers have been willing to talk confidentially about these, although they are generally unwilling to write about them, mainly because they do not want to publically criticise or be seen to criticise their current or past organisations.

However, it is clear that there is a need to improve the *major donor experience* alongside improving all donor experiences.

I have identified three fundamentals that underpin exceptional major donor experiences:

1. Mindset – major donor-centric organisations are those that have genuinely switched from a mindset of major donors as funders of the organisation’s mission to one of major donors as partners in a shared mission. Poor major donor experiences result when the organisation’s mindset is ‘We need major donors to fund our programme and we’d prefer them to let us get on with our work’. If that is your organisation’s mindset, then major donors may not be right for you.
2. Major donor fundraising is about the relationship between the donor and the organisation – the whole organisation. The nature of being partners in a shared mission means that major donors will have and want to have relationships with staff in many parts of the organisation – from the Board to the CEO and leadership team to programme or project delivery staff to fundraisers and support staff. That is why major donor fundraising requires a whole organisation approach where people are aligned on direction, strategy and priorities. Without this, your major donor experience will be weak.
3. Building a long-term relationship and providing an exceptional donor experience is nigh on impossible if the relationship manager changes very frequently. So to improve the major donor experience, you must solve the problem of high major donor fundraising staff turn-over.

The project conclusions support the premise in the project description that good major donor fundraising can offer suggestions on how to improve the donor experience more generally. A number of the recommendations that follow – such as seeking out the donor’s story, seeing the relationship from the point of view of the donor, making the relationship personal and authentic – will improve the experience of all donors. The challenge for fundraisers is how to apply these principles cost effectively at financial levels below major donors. Major donor fundraisers can and should contribute alongside their individual giving colleagues to answering this ‘how’ question.

Major donors offer transformational opportunities for organisations to make a step change in both their income and impact. Without the three fundamentals above, it is extremely difficult to create an exceptional major donor experience and to turn that opportunity into reality. Major donor fundraising is not difficult, at least in theory, but it is incredibly difficult to do exceptionally well in practice and on a consistent basis. Even organisations that have had success do not always continue to hold on to that success.

The project outline asks what is ‘cutting edge’ in major donor fundraising. Research and interviews for the project suggest there are a number of external trends that are, and will continue to, directly impacting major donor fundraising. These include:

- The changing and uncertain regulatory environment
- The changing nature of (major) donors, including generational differences in attitudes to both wealth and philanthropy
- The emergence of alternative and/or new approaches to philanthropy, including venture philanthropy, impact investing and social enterprise, especially by ‘mega’ donors creating their own philanthropic vehicles
- The role of financial and philanthropic advisers as intermediaries between donors and the causes/ organisations they support
- More general trends that impact all fundraising, such as the digital revolution

Each of these is influencing how major donor fundraisers can and need to operate. Understanding and responding to these trends is an important part of the major donor fundraiser’s approach, strategies and toolbox. Most contributors do not regard them – at least yet – as key to ensuring an exceptional donor experience. For this reason, they are not explored within the project.

Rather, the project focuses on the relationship elements that do ensure an exceptional donor experience. The key message here is exceptional major donor experiences result from implementing tried and tested approaches to very high standards. A truly donor-centric approach that builds genuine, authentic relationships consistently over time is what puts organisations at the cutting edge of major donor fundraising.

Summary guidance

The project reached three key conclusions

1. An exceptional donor experience, built on a genuine and authentic relationship between donor and organisation, is at the heart of effective major donor fundraising practice. For this reason, major donor fundraising can offer learning on how to improve the general donor experience. Major donor fundraisers are well placed to help other fundraisers think about how major donor fundraising approaches and techniques can be provided for other donor groups in a cost-effective way.

However, the major donor experience is not universally good, and there is much that can be done to improve it. There are also strong indications that improving the major donor experience could unlock significantly more major donor support to a wide range of causes and organisations.

2. Three fundamentals underpin exceptional major donor experiences:
 - 2.1. An organisational mindset that major donors are partners with the organisation in a shared mission, not funders of the organisation’s work to be held at arm’s length.
 - 2.2. Working with major donors to achieve this shared mission requires a whole organisation approach. In practical terms, this means the donor will have and want relationships with people in many parts of the organisation – the Board, the CEO and leadership team, programme and project delivery staff, in addition to fundraisers and support staff – and these need to be aligned over direction, strategy and priorities.
 - 2.3. The relationship manager (major donor fundraiser) is fundamental to creating an exceptional donor experience and building the long-term relationship between donor and organisation – they choreograph the elements and components.

3. There are a number of external trends – including the changing nature and needs of major donors – currently affecting major donor fundraising practice. While these are an important part of major donor fundraising, most contributors do not regard them as fundamental to an exceptional major donor experience. Rather, an exceptional major donor experience is built from the nature of the relationship between donor and organisation. The cutting edge of major donor fundraising is creating genuine, authentic relationships consistently over time.

The project has identified 21 actions/recommendations to improve the major donor experience. They are listed and summarised below, grouped under 10 principles/themes.

1. Being really clear about what a major donor to your organisation actually is

‘Never measure your generosity by what you give, but rather by what you have left.’

Bishop Fulton J. Sheen, Roman Catholic bishop, broadcaster and author

The term ‘major donor’ has a wide range of definitions across different organisations. The project has concluded that this is natural and appropriate. There can be no simple ‘one size fits all’ definition of a major donor.

The most donor-centric definition of a major gift is a gift or contribution that is ***personally significant to the donor***. Although this creates practical challenges (my major gift may be below the threshold that an organisation considers a gift to be ‘major’), it does offer a way to shift thinking – to see major donors as those making an extraordinary commitment ***for them*** to a cause and organisation.

Three recommendations follow:

Recommendation 1.1 – fundraisers should create a culture that notices and responds to major donors as those who make an extraordinary commitment for them.

Recommendation 1.2 – fundraisers should carefully define a major donor, taking into account their organisation’s unique circumstances and by considering: current and potential giving, financial and non-financial support, and whether to include foundation and corporate gifts.

Recommendation 1.3 – if, as is the case in many organisations, the chosen definition includes a wide range of financial levels and other types of support, fundraisers should create tiered approaches to the donor experience that are explicit to other stakeholders in the organisation.

The definition of a major donor is a significant question, which is discussed fully in the main body of the report.

2. Deciding whether major donor fundraising is really right for your organisation

‘To fully explore this income stream our entire organisation needs to understand the degree of commitment required, needs to make the necessary commitment and needs to then deliver on that commitment.’

Sharon Jackson, Consultant

Major donors increasingly want to give more than money. Many want to write cheques, but they also want deep involvement with the causes and organisations they support.

Not every organisation values or wants such involvement. If your organisation is one that does not, there is a real decision to make as to whether this is the right income stream for you.

Get it right and you can grow transformational income. Get it wrong and you miss out – and you may also negatively impact the sector more broadly, as major donors will not receive the donor experience they need to inspire their giving.

Recommendation 2.1 – organisations should make a conscious decision about whether major donor fundraising is right for them and only pursue if they want the involvement major donors want, and they are prepared to meet the needs and interests of their major donors.

3. Seeking out the donor's story

'When you bring together the donor's story with the story of the problem he will solve, you'll create a new story. That story will be one of impact and of hope.'

Richard Perry and Jeff Schreifels, The Veritus Group

Major donors usually have a story about how and why they came – or want – to support a particular cause and organisation. Very often this is not about the need of the organisation, but about the donor's personal and professional background and passion.

David Harding, founder of Winton Capital Management, gave £5m to the Science Museum in London (the organisation's largest ever single gift) to create Mathematics: The Winton Gallery that opened in 2016. The why of his story? A combination of his business success being built on mathematics and a love of the Science Museum from spending happy hours 'pressing buttons' as a child.

The challenge is that over time donor stories get lost, especially when fundraisers move. If the donor's story gets lost, it is easy for the donor to feel unappreciated and the relationship to flounder.

So a key to improving the donor experience is valuing and celebrating the donor stories that link donors and organisations – and ensuring they are held in the organisation, even when the major donor fundraiser moves on.

Recommendation 3.1 – fundraisers should build a culture where donor stories – the why underpinning a donor's support for an organisation – are actively discovered, curated and celebrated.

Recommendation 3.2 – fundraisers should embed donor relationships into their organisations, building multiple contact points for the donor with relevant key staff across the organisation. This will help ensure that donor stories are not lost when the major donor fundraiser moves on.

Recommendation 3.3 – fundraisers should create effective 'handover' processes when relationship managers need to change. Ideally, the departing staff member will introduce the new contact personally. This may not always be practically possible – but implementing **Recommendation 3.2** will help enable creative options when it is not.

4. Seeing the relationship from the donor's point of view

'I'd run a mile if I thought an organisation was trying to moves manage me!'

Ken Burnett, author of Relationship Fundraising

Most major donor fundraisers use a 'step' process or moves management system – a series of actions over time focused on the objective of securing a gift – to progress a donor relationship.

The challenge is that these models can encourage the fundraiser to focus too narrowly on the gift as the end result.

An alternative – and more donor-focused approach – is to think about the next step in matching the donor's needs, interests and passions to the issues your organisation works on. If major gift fundraisers shift their thinking to making the next move according to what the donor might want and enjoy, the gift will result. The donor experience will be better and the gift may well be larger.

Putting the donor experience at the heart of major donor fundraising is leading some organisations, especially in the USA, to consider rebadging their major donor fundraisers as philanthropy advisers.

Recommendation 4.1 – fundraisers should reframe their major donor fundraising process to see it from the donor’s perspective. Here are some examples of how that might look:

- At the involvement stage: at each encounter the charity’s understanding of the donors aspirations, interests and passions is growing; and the donor’s trust of what can be achieved together is building.
- At the ask stage: the charity makes an offer that matches the donor’s vision and excitement for how they can make a difference.
- At the acknowledgement and stewardship stage: the donor feels genuinely and personally thanked for his or her gift and feels an equal stakeholder in the project, on the inside track, even if it is not going according to plan.

5. Making the relationship personal and authentic

‘But the best experiences are normally the special “money can’t buy” ones – for example, my wife was invited to sit and watch a ballet at the Opera House from the wings, which is a very special experience if you’re a supporter and love ballet.’

Lloyd Dorfman CBE, The Dorfman Foundation and founder of Travelex

Major donor fundraising succeeds when relationships are authentic and personal.

A very simple key message, but one that taken seriously can radically improve the donor experience.

Recommendation 5.1 – fundraisers should treat major donors with the courtesy and respect they would a friend, while remembering that they are the face of the organisation’s relationship. As noted in Recommendation 3.1, fundraisers are responsible for building multiple contact points with relevant people across the organisation.

Recommendation 5.2 – fundraisers should carefully match staff members to individual donors and prospects. In doing this, they should consider the wide range of factors that will result in the most effective ‘fit’ and the all-important ‘chemistry’ between individuals.

Recommendation 5.3 – fundraisers should find out and respond to the donor’s preferred style and methods of communication. For one donor, a formal evaluation report might be preferred; for another, a visit with an opportunity to talk to project beneficiaries. One donor might prefer immediate news by email; another might prefer a face-to-face visit each quarter.

6. Building major donors’ support over time

‘When I started out, there was a generally accepted model for “intelligent giving” which involved a three-year funding cycle: in year 1 you give, let’s say, £100,000, year 2 you give £50,000, year 3 you give £25,000, and year 4 you’re out. That was supposed to be intelligent, sustainable funding because you’re out and the charity’s still going. But we now do the precise opposite to that. We’d probably start off with the £25,000 or £50,000 grant and then give more as the partnership develops. For example, we started off giving the Duke of Edinburgh’s Award £20,000 but we gradually increased our support over 13 or 14 years and we are now giving £350,000 a year. In fact, we’ve given them close to £2.5m in total. It’s interesting how that’s come about and it proves that we aren’t using terms like “relationships” and “partnerships” as jargon – we mean it.’

Trevor Pears, Pears Foundation

Major donors rarely give their biggest major gift first. They ‘try out’ working with an organisation to explore the fit between them and the organisation. So the right donor experience can make a significant contribution to growing a major donor’s support over time.

In this way, the donor solicitation process is best thought of as a cycle: delivering on the organisation's promises to the donor is the last step of the first gift, and the first step of the next gift. Put simply, a happy donor is more likely to give again and probably to give more. So the donor experience of gift management, personal acknowledgement, public recognition, and financial and impact reporting are critical to building support over time.

Recommendation 6.1 – fundraisers and organisations should focus on the long-term potential of the donor rather than short-term income.

Recommendation 6.2 – fundraisers should offer a range of public recognition opportunities, but make sure they are not seen as 'one-size-fits-all'. Instead, public recognition should be tailored to what is valued by the donor.

Recommendation 6.3 – fundraisers should ensure the organisation delivers on its promise to donors through regular reporting on how the gift was spent and demonstrating the impact and difference the gift has made.

7. Handling things well when they go wrong

“Most major donors have made money in business and understand that you have to try a lot of things, and that sometimes things work and sometimes they don't.”... “As a major donor, I want a bit of honesty. If it failed, I just want to know that it failed.”

Nick Jenkins, founder of Moonpig.com, 'dragon' on Dragons' Den

Even in the best circumstances, things happen that can lead to donor relationships going wrong. If or when they do, you need to proactively fix them. Just as in other spheres of life, a problem handled well can add to, not damage, the overall donor experience and may ultimately create a stronger advocate for your organisation.

From the research and interviews for this project, the most common reason things go wrong is when there are significant changes to projects or programmes that donors are funding, and organisations fail to communicate with and involve the donor.

Recommendation 7.1 – fundraisers should build the organisational culture that sees donors as project stakeholders who should be consulted and informed if or when things go wrong.

Recommendation 7.2 – organisations should learn from donor relationships that do go wrong to put in place systems and processes to prevent future problems.

8. Looking and behaving like one organisation

‘They (major donors) appreciate the skill of fundraisers, but would rather interact with leadership and front-line staff.’

Beth Breeze and Theresa Lloyd, authors of Richer Lives: Why rich people give

Major donor fundraising – more than any other type of fundraising – involves the whole organisation looking like and behaving as one organisation.

Major donors will have, and want to have, contacts at many levels and across the organisation. All of those staff members should be aligned behind a common message about the organisation's ambition, strategy and priorities.

Recommendation 8.1 – fundraisers should build a strong understanding of major donor fundraising among colleagues across the organisation who will be involved in relationship building. As part of this, they will need to comprehensively brief colleagues on their role in each individual relationship.

Recommendation 8.2 – fundraisers and others should make sure they never make a promise to a donor they or the organisation cannot deliver.

9. Retaining your major donor fundraisers

‘Some of the people that come to see me from time to time are what I like to call “professional money-slingers”. They start off very rapidly, giving their case. They don’t allow any time for a colloquy between themselves and the donor. You know, there’s a time when a sale is made and some people don’t know it.’
William Whipple, American philanthropist

Major donor fundraisers are in high demand from organisations large and small, and it is hard to recruit and retain major donor fundraising talent and experience. There are numerous opportunities for frontline major donor fundraisers to move up the career ladder.

That then creates a significant challenge: it is very hard to build long term, personal relationships when major donor fundraiser turnover is high. The most successful organisations are responding to this challenge and so improving the major donor experience.

Recommendation 9.1 – organisations should recruit fundraisers with the right characteristics – those who are passionate about the cause and genuinely curious about what makes people tick.

Recommendation 9.2 – organisations should invest in ‘on-boarding’ – immersing new recruits in the organisation to inspire *their* passion in the work and organisation.

Recommendation 9.3 – organisations should explore and apply the retention and reward mechanisms that are becoming common in the higher education sector, so that experienced major donor fundraisers can remain in frontline roles *and* experience career progression in terms of status and salary.

10. Learning from success stories

‘The biggest gifts are made to charities that are prepared to work alongside donors to craft exciting propositions.’
Matthew Ferguson and Gemma Peters, Directors of Principal Gifts King’s College London & King’s Health Partners

Successful major donor fundraising organisations, including many in the higher education sector and exemplified by the recent King’s College London fundraising campaign, are highly responsive to the opportunities that working together with major donors offer.

They genuinely see major donors as partners in their mission – which brings us full circle to **Recommendation 10.1**. Only pursue major donors if they are right for your organisation.

10

Back to the future – a new approach to legacy fundraising

Project 10. Legacies

Stephen George, April 2017
Reviewed by: Richard Radcliffe

The original brief

Legacies are a significant source of income for many charities, so it is important to retain the confidence of those who have already included charities in their wills and to encourage more people to do likewise. This project will look at the strengths and weaknesses of the current model of legacy fundraising and identify how we make sure that people feel encouraged to include charities in wills.

For senior management and trustee boards, this project will:

- Show why they should create an internal culture where legacy giving is celebrated and encouraged.
- Help them to have the courage to invest in legacy giving and promotion.
- Show why emotion and identity is at the heart of legacy giving and how fundraiser's can use this responsibly to increase income in this area.
- Encourage them to review their probate experience to incorporate gratitude and not make it solely a legal process.
- Encourage them to leave a legacy to their organisation.

For donors, this project will:

- Increase opportunities for donors to feel unique, special and valued for making a gift in their will.
- Reduce the chance that they will be made to feel uncomfortable by the misuse or inappropriateness of poorly targetted legacy promotion.
- Reduce the chance that executors feel under-valued or under undue pressure from charities taking an overly legalistic approach in managing estates.
- Show they are appreciated through engaging communications and invitations to events, in the knowledge they are free to change their mind at any time.

An introduction and overview

This CDE project 10 is about legacies, or gifts in wills. One of the great acts of giving. The approach in this project paper takes a clearly defined viewpoint.

That the donor's needs when met, make the difference and are the route to more gifts in wills.

In this project, we explore emotions, behaviour change, donor insight and the connections needed to inspire and engage supporters to make a legacy gift. We take a step back and look at the background to legacies and foundations thereof, the opportunities available to us and the way we approach raising money. We explore behaviour change, measures, and research and learning into legacies from a donor viewpoint. Finally, we take a look at donor-friendly insights – the donors and their families, the impact of the organisation, the fundraising techniques and the final process of probate.

The project includes four case studies: Remember a Charity, WaterAid, UNICEF UK and Cystic Fibrosis Trust. These showcase strategy, marketing and campaigns, and show how a donor experience can drive everything in an integrated approach.

Why 'Back to the Future'? Because we cannot embrace a new approach without inspiration from the past. Legacies are human. Fundraising understands that, but the challenge is to reassert the donor ahead of the driving forces and techniques by which we can so easily be dazzled. The past reminds us and inspires us, but it is in the here and now that we must act if we are to make a difference in the future. If we tune in to emotions and weave them into it the new technologies against a backdrop of the largest transfer of wealth ever, we can not only change the world, we can change donors' worlds.

As we look back to look forward, it is worth drawing on the words of the famous **George Smith** (founder of direct marketing agency Smith Bundy and one of the greatest writers on fundraising) who, in **Asking Properly**, said of legacies:

Just about the third of all income to British charities comes in the form of legacies. Yet we plod around the opportunity is if we undertakers ourselves, clad in black crêpe bands hanging from a tall hats. We need not just admit the scale of the legacy programme to shout about its joy, its promise, its inherent customer satisfaction. For it is the only donation that never reflects in the donors current account. It is the only donation most of us will ever make in thousands, tens of thousands, hundreds of thousands of pounds. It is the only donation that just about everyone can make

We need to talk about legacies everywhere. We need stop apologizing to raising the issue. **We need to stop coughing nervously.**

'Back to the Future' – a new approach to legacy fundraising for the 21st Century.

The opportunity before us

1. The **audience is growing older** and there will be many more of them in the next 30 years as the death rate increases
2. This is the **wealthiest generation** in human history
3. **Technology and the media** are making them accessible and open
4. They are increasingly **motivated to do good**, and leave a reminder of their time on earth
5. We are learning **about behaviour** in a way that can help meet donors on their terms, inspiring them to take action and leave a gift.

In its simplest form, more people living longer with an increasing death rate and wealth over the next 30 years means more legacies if we inspire, engage and educate them about the benefits of leaving a gift to a favourite cause after bequests to friends and family. If we place the donor first, we can make a huge impact on the causes we all care about. If our purpose is to inspire the donor, we can triumph. If our purpose is to raise cash, we will fail.

How we organised this project and gathered insight

To draw together some inputs, ideas and contributions to shape some of the conclusions and recommendations in this paper, we have organised the collection of insights around four areas that can affect legacy fundraising from the position of the donor and provide insight to the fundraiser – **Donors, organisations, marketing and legacy administration.**

- (a) **The needs and experience of donors and their families** – seeing it from the donor’s viewpoint
- (b) **Different organisations’ cultures, capacities and experiences** – seeing it from the organisations viewpoint
- (c) **The legacy marketing and influence method and experience** – seeing it from the way in which fundraisers fundraise
- (d) **The probate experience and approach** – seeing it from the experience of the donor and the charity when families engage with a charity through probate (*Probate is the legal process whereby a will is “proved” in a court and accepted as a valid public document that is the true last testament of the deceased – Wikipedia*).

This was explored by asking participants to define:

- (a) What works, what inspires and provides a positive experience?
- (b) What prevents the delivery of an inspiring and positive experience?
- (c) How could fundraisers make this experience remarkable at present and in the future?

A survey was created using Survey Monkey, and was distributed via the Institute of Fundraising Legacy and the In Memoriam Special Interest Group, as well as on Facebook, Fundraising Chat, LinkedIn and via blog posts on UK Fundraising during the summer of 2016. Findings and feedback were collated and were used to distil the recommended actions. Specific individual heads of legacy fundraising were emailed as part of the IOF Special Interest Group and through Remember a Charity, which sent the questionnaire to its 160 members. The four case studies (set out as appendices) were identified as part of this.

The content in this report draws on the authors’ experience and background knowledge, as well as on the perspectives from others (referenced throughout) to illustrate the thrust of the paper and to support the conclusions.

The project has identified 12 principles and 29 recommendations. The recommendations are listed as a straight set of 29 points that were created using the framework above – donors, organisations, marketing and legacy administration.

Principles to guide the development of a donor experience in legacies

1. A conversation is the way forward to inspire and engage supporters to leave gifts in their wills.
2. If we place charity and leaving a legacy as a compelling proposition and a new social norm alongside the donors transfer of assets to family and friends, we could transform giving and charitable impacts in the near future
3. There is a new opportunity to drive scale, reach and impact with donors and prospective donors through technology and social media,
4. With people over 50 forming two-thirds of the volunteer workforce, the spirit of giving and the motivation to give is something that charities must step up to if this opportunity is to be met.
5. If we are able to tune in to the behaviours of this generation, we will be able to design new ways to engage them that makes the opportunity before us real.
6. If we can convert just one per cent of non-charitable estates into charitable ones, we could raise another £78 million for charity each year.
7. Reconstructing a new social norm for gifts in wills needs to be a major focus of campaigning and experience, both as a sector and for each individual organisation.
8. We are in an era that is experiencing a shift from legacy marketing to legacy influence. This means shifting our measures to focus on conversations as the means to engage a wider audience and valuing consideration as much as commitment.
9. A shift to create engagement, inspiration and conversation will grow the market, educate those who still don't know about legacies and work in a way that is in keeping with the donor's behaviour.
10. To help everyone engage with legacies, we need to deliver knowledge, tools and confidence to all staff and partners to enable a conversation about legacies to begin.
11. The closer we are to the donors in terms of the way in which we engage them, the more likely we are to inspire them to act.
12. Bringing the probate experience under the wing of the fundraising and stewardship process changes the paradigm to an experience rather than a required process.

Twenty-nine recommendations to help create legacy programmes that enrich and enhance a donor experience

- 1. Fundraising staff, volunteers and partners should start with insight and understanding of donors through data, evidence, and behaviour and, most importantly, by asking and listening to what donors want and need**
 - Gathering insight requires a deliberate process and mind-set
 - Donors value being asked - value is translated into a closer relationship
 - Ways to do this are through asking questions, seeking views, engaging at events, asking for help and demonstrating listening before telling
 - Basic insight can come from basic knowledge – gift, geography, age, and do on
- 2. Focus on amplifying the personal insight, knowledge and behaviour of donors so they feel unique, special and valued**
 - Creating a stewardship programme that delivers a personal service can deepen belonging, commitment and loyalty
 - Many Legacy Fundraisers send hand-written and bespoke communications, and fundraising should invest in ways that enable this
- 3. Use stories as the way to communicate, inspire and engage**
 - Deliberately engage donors with key questions such as ‘How did you first get involved?’ ‘Why did you first start to support us?’ ‘Tell us your story’
 - Creating a deliberate story collection process will encourage the collection and sharing of stories
 - Written copy should include stories from donors to help create social norms
 - Individuals should feel able to tell a personal story to help them make an authentic connection with donors
 - Training in storytelling should be a core part of fundraiser training and support
- 4. Demonstrate the current impact on and outcomes from the charity and about its cause, as this reinforces confidence when donors consider the future impact of leaving a gift in their wills (see CDE project 19 – *Evidence of impact and effectiveness*)**
 - Anxiety about how gifts will be used in the future needs reassurance in the form of clarity regarding how gifts are spent at present – constantly sharing and celebrating impact today and in the past should be part of on-going communications
 - Using examples of recent or existing gifts being used to deliver a service or programme reassures and inspires those considering a gift
- 5. Building on existing connections or offering to connect with the work motivates and inspires gifts and reinforces relationships**
 - Events should be focused on the work and on impact more than on the mechanism of a legacy
 - Finding ways to connect the donor to the cause and work build trust and deepen the relationship
 - Invitations to events that showcase the work are ways to build contact and inspiration, even when donors can’t or don’t attend. The act of inviting has great value and must be part of the measures of success

- 6. Embrace the heritage of the organisation and the charities' founding and journey to today, however recent. This enhances the experience and value of a legacy gift and demonstrates organisational and donor trust and stewardship in the past, in the present and in the future**
 - Past personal experience and memories are key elements when looking at the heritage of a life or an organisation. Reflect this in messages that look to the past and the creation of the charity, through to the present and extending into a positive, optimistic future
 - Finding founder stories help to reinforce passion and longevity. Messages and materials should reflect this mix
- 7. Thank donors who are considering making a bequest as much as those making a commitment – taking a step towards considering a legacy is a major one, and every step requires encouragement, gratitude and support (see CDE project 4 – *Thank you and welcome*)**
 - Move thanking the donor up the scale to acknowledge each step
 - Legacies are a long-term consideration, and require the experience and journey to be positive and promote the next step
- 8. Build and deliver consistent messages. Communications that conflict with legacy messages undermine the legacy journey and the donor experience. If donors feel they are not valued or part of the solution, they will withdraw**
 - Create an organisational legacy messaging or brand book
 - Use core language, phrases and words
 - Require all communications with legacy messages to follow these guidelines regardless of the channel or audience in order to build consistency
- 9. Focus on long-term results through short-term activity. Donors and fundraisers need to understand the balance between these aspects because they are investing for the long term rather than to attain a short-term hit, even though the need may be urgent**
 - Future value can be stored and measured
 - Long-term intent and aspiration are key parts of positioning for charities
 - Short-term campaigns are about building a pipeline for the future
- 10. Inject emotion into wider messages. Emotion drives donor satisfaction and is the key building block to inspire supporters to give (see CDE project 6 – *The use and misuse of emotion*)**
 - Understanding how to connect with emotion should be a core skill of all fundraisers, particularly those delivering legacy programmes
 - The wider supporting teams should be able to use the legacy messaging and 'brand book' to guide and support emotional content
- 11. The organisation's style, approach and culture should do all it can to match the donor experience and messages as a core competence**
 - Staff should receive induction and training about legacies, the donor experience and needs
 - Donor insight, understanding and motivations should be a core competency
- 12. Ensure donors receive feedback and dialogue to deepen trust and relationships**

13. Legacy messaging and positioning should show that the entire organisation values legacies and the donors who are considering them

- Staff should be briefed on and trained about legacies
- Legacy gifts and stories should be shared across all staff
- Processes to engage with the public or donors should ensure there is a donor-friendly approach in place

14. Charities should support efforts to ‘normalise’ legacies by the way they behave towards staff, how they talk to and engage with the public and partners, and through active contribution within the sector

- Supporter services, helplines and all channels donors can use to call, write or email should be able to respond and engage with regard to legacies
- Organisations should ensure donor satisfaction and engagement are measured and monitored
- Organisations need to recognise that they can play a part in helping to create the atmosphere and environment in which legacies are considered accessible and valuable

15. Belonging to and contributing to a consortium campaign to promote legacies (Remember a Charity) can help to create an internal atmosphere of acceptance and normality regarding legacies, in addition to supporting and engaging a wider audience

- Donors like to see charities working together, and charities can leverage engagement by being seen as part of a wider campaign
- Contributing to the wider campaign provides practical internal opportunities to engage supporters in a helpful way and creates content that engages staff

16. Trustees should take responsibility for engaging and understanding legacy fundraising and be able to support the donor experience by engaging themselves in the organisation’s legacy programme and supporting the charity by leaving gifts in their wills (See CDE project 15 – *The role of trustee boards and senior managers*)

- Leadership and acceptance from the governing body helps to set the tone for how legacies are delivered and received by donors
- Trustees should sign up to a legacy strategy and approach
- Trustees should show personal leadership and commitment
- An annual legacy report on performance and donor satisfaction should be tabled

17. Organisations should measure the donor’s experience of legacies through a net promoter score collected as part of the legacy programme (See CDE project 3 – *Satisfaction and commitment*)

- Donor experience, if sought, sends a signal that the experience matters
- Measurement is focused on a good and positive experience, and the system and process stemming from this provides a further opportunity to engage supporters

18. The legal and probate processes of a legacy gift should closely follow or be part of the gift process in order for donors to have the same experience of giving, recognition and gratitude

- Where possible, legacy administration should be the responsibility of the Fundraising Department
- Written supporter-care policies and practises should be adopted for legacy administration
- Executors of estates and families of those who have left a gift should be valued and stewarded
- Donors require service and support in a consistent way that is in line with their view of the charity

19. All staff should have a basic understanding of the needs of legacy donors during induction to help to create a legacy environment in which donors are valued

- Donors can engage various parts of an organisation during legacy consideration - finance, communications, legal, fundraising. These staff should therefore be briefed and trained
- Having joined-up understanding and empathy can improve the experience at all touch points
- Along the journey, involve and engage staff in legacies to emphasise that everyone plays a part in making the donor feel good and valued

20. Ensure the organisation's brand projects the organisation's needs in a way that also reflects the needs and aspirations of the donor

- Charity brands must ensure they understand and connect with their audience and engage them on their terms rather than overlay organisational messages that do not connect
- Legacy messaging must sit comfortably with an organisation's future aspirations, messaging and brand values

21. Build a programme of events and face-to-face opportunities that reflect the personal nature of the gift

- Developing a marketing approach that offers donors the opportunity to meet face-to-face helps to inspire and engage donors
- The mere act of being invited can have far-reaching impacts on future legacy gifts
- Encourage face-to-face conversations whenever possible

22. Incorporate and integrate legacy messages alongside all fundraising activities, channels and supporter journeys to demonstrate the need, the normality and the value of legacies

- Incorporating legacy messages can help to normalise legacies, particularly when they are seen alongside other, familiar messages
- This is often described as a 'drip drip' approach and can help to normalise as well as to educate
- These can and should include newsletters, web pages, email, mailings, phone calls, PR and face-to-face encounters

23. Embrace technology as a key opportunity to inspire and engage donors in a positive way that supports donor engagement and builds relationships (see CDE project 11c – *Digital*)

- The use of social media such as Facebook Twitter and YouTube, amongst others, provides the perfect medium in which to engage, and should be a core part of an integrated legacy programme
- There is an opportunity to find innovative ways to engage supporters on their mobile devices

24. Emphasise the donor's life and needs ahead of the organisation's needs

- In making a legacy gift, we need to emphasise and focus on donors' motivations
- Use phrases such as 'you' rather than 'we'
- Make the donor the subject and voice

25. Whenever possible, bring together the fundraising, marketing, communications and legal aspects of legacy fundraising so that they operate in a holistic and donor-centred way (see CDE project 11 – *Communication with individual donors*)

- Bringing these together creates a shared purpose supported by a donor-led philosophy
- Build a common behaviour with a common donor-friendly journey and approach
- The donor sees a joined-up experience

26. Create a charter or statement of principles that is donor focused for everyone to work on around legacies

- A charter or statement that is focused on putting the donor first creates a platform and self-guiding rules for working together
- They can be seen by donors as encouraging, engaging and building trust

27. Build a welcome programme and stewardship model for donors' executors of wills (see CDE project 4 – *Thank you and welcome* and CDE project 16 – *A distinct service culture*)

- Engage donors in the experience. An executor has great influence, and this opportunity exists to influence them positively
- Drive the legal process alongside a 'customer' or 'donor' journey
- Acknowledging and helping families and executors builds trust

28. Involve and engage executors, solicitors and partners in the work of the charity and invite them to events

- Those involved in the probate process should be looked after and influenced as potential supporters and partners in a positive way
- They act as powerful allies and advocates if they have positive experiences

29. Ensure that all communication, including legal and probate content, is donor friendly

- Ensure that all communications use the learning and insight set out in earlier parts of this report
- Use donor-friendly language and provide a consistent experience





Making it easy for donors to engage across all channels

Project 11. Communication with individual donors

Craig Linton, Gail Cookson and Anthony Newman, April 2017
Reviewed by: Matthew Sherrington

For senior management and trustee boards, this project will:

- Summarise the 10 major themes that emerge from across all the project 11 reports.
- Explain the benefits of having an integrated approach to fundraising that is based on the needs of the donor and not internal departments.

For donors, this project will:

- Improve the quality, timing and relevance of communications they receive from fundraisers.
- Reassure donors that their data is handled legally and sensitively.

Overview

'We have two ears and one mouth so that we can listen twice as much as we speak.'
Epictetus

Project 11 comprises six different sub projects investigating how the donor experience can be enhanced via different channels commonly used in communicating with individual donors. These projects cover:

- Mass media
- Direct mail and other areas of direct marketing
- Telephone fundraising
- Digital fundraising
- Community fundraising
- Face-to-face fundraising

Direct mail, telephone and face to face were the three channels which came in for the most criticism in the summer of 2015 following the tragic death of Olive Cooke. Whilst this makes it an incredibly important channel for fundraisers, it was clear that changes in practices had to be made and have been made. The sector had to listen to donors and take remedial action. Complaints are not just noise, they are insights to be acted on.

Each project provides the reader with a set of guiding principles, from the visionary to the practical, from the strategic to the tactical. Some are quite fundamental and would need earnest consideration by charities as to how they were to approach them as it would require a change of mindset and attitude. However, there is a belief that some fundamental changes are needed not only to improve the donor experience but to regain the trust in charities which lies at the basis of voluntary giving.

Across the six reports there are some universal themes that are worth grouping and summarising. These have important consequences for individual giving fundraising and we have outlined the top 10 below, together with references to where they are mentioned in the reports. There is also significant overlap with other commission projects and these are highlighted where relevant.

This introduction to individual giving concludes with some thoughts and recommendations on integration. Just as 'no man is an island', no fundraising channel should be either. The need to avoid silos and work collectively across channels and departments is highlighted time and again in the six topics that comprise project 11.

1. Setting long-term metrics and getting buy-in from trustees and non-fundraising colleagues for non-financial targets

Improving the donor experience will involve us changing the 'fast buck' and low value approach (project 11a, page 11a.4) that has typified much of individual giving recruitment in recent years.

To do this, it is important that 'Trustees should take responsibility for setting the charity's' culture by putting donors at the heart of the organisation's thinking and engaging in the donor programme' (project 11d, page 11.5). Furthermore, 'long-term investment and ambassadorial support are critical' from trustees (project 11d, page 11d.5).

The telephone project gives clear guidance on what some of these long-term metrics and non-financial targets should be:

'Be evaluated by a wider range of metrics than year one return on investment and take a long-term view – focus on more than just financial metrics as measures of success... Donor satisfaction, quality of conversations, retained permission for future contact and attrition can and should also be used to measure success.' (project 11e, page 11e.3).

According to the research undertaken for 11e, the onus is on charities to improve their performance in this area. Only 21% of respondents said they used long-term metrics, and agencies reported they offered charities the chance to listen to calls and assess satisfaction, but few take them up on this.

Links to other commission projects: Project 3: *Satisfaction and commitment*; Project 15: *The role of trustee boards and senior management*; and Project 20: *Fundraising investment*.

2. Research, gathering feedback and giving donors choice

Closely related to point one, the need for research to understand donor's motivations and needs and then consistently seeking feedback and offering choice was viewed as important across a number of reports.

The digital paper urged fundraisers to 'Take time to find out and understand the interests and motivations of donors' (11c, page 11c.4) and to use surveys on your website to guide understanding of donors' needs.

Similarly, the community project advises, 'Understanding the motivations of a volunteer, funder or fundraising group is critical in ensuring connection, support and charity reputation is maintained, as well as being a good way to better get to know the supporter and to deepen the relationship and interaction on both sides' (11d, page 11d.6).

There are some examples of how to do this in other reports. The telephone paper discusses using consent calls to find out what the supporter is interested in (11e, page 11e.4).

The work of Amnesty International Belgium (Flanders) and DonorVoice is used in a case study to demonstrate how capturing donor feedback and identity at the point of sign up has increased face-to-face fundraising retention from 60% to 80% by the end of month 3.

One recommendation would be for further guidance to be produced on how to conduct research and gather feedback for charities with limited budgets.

Links to other commission projects: Project 3: *Satisfaction and commitment*; and Project 13: *Giving choices and managing preferences*.

3. Use of data and customer relationship management (CRM) system

Accurate and relevant data recorded on a functioning CRM system is crucial to improving the donor experience. It is hard to provide a great experience if we do not know who our supporters are and don't have an accurate record of past interactions, giving history and relational information.

As outlined in 11d, page 11d.5, 'A strong database management infrastructure is critical in delivering growth in community fundraising.' Similarly, telephone fundraisers are encouraged to '**Utilise the information and insight** gathered during the conversations irrespective of the outcome of the contact. Ensure this is contained within data files that are used for follow-up activity, e.g. thank you or follow-up letters' (11e, page 11e.5).

Links to other commission projects: There is no specific project on data and CRM, although it is a topic that is discussed in numerous projects.

4. Welcoming new donors and the supporter journey

Another popular theme is how fundraisers should welcome donors and then develop tailored supporter journeys. Different projects suggest different approaches on the best way to do this, although there is broad agreement on their importance.

For example, 11f encourages the use of the phone in conjunction with face-to-face fundraising to enhance the experience: 'By asking new supporters for a little more information, and saying thank you well, the alignment of a good telephone programme with a face-to-face programme can prove valuable to the donor

and the charity. It helps to place the relationship on a firm foundation, and it makes sure that the ongoing supporter journey is one that the supporter wants.’ (11f, page 11f.7).

In the digital sphere it is recommended that fundraisers ‘Physically map the full and various journeys for supporters through all your communication streams. This should be done for online and offline channels together.’ (11c, page 11c.4). This will ensure that you ‘consider if the journey is something that you would consider to be positive, rewarding and inspiring.’ (11c, page 4.)

In community fundraising the welcome donors receive was thought crucial: ‘On boarding and welcoming a community donor is an important stage in the relationship and many potential relationships break down at this earliest stage.’

A word of warning needs to be given around welcoming donors and the supporter journey. It is easy to spend a lot of time and money on journeys that actually don’t improve the experience or improve retention. Make sure that you have measurements in place to assess the improvements in loyalty, commitment and satisfaction any welcome programme or supporter journey produces.

Links to other commission projects: Project 4: *Thank you and welcome*; Project 5: *The supporter’s journey*; and Project 13: *Giving choices and managing preferences*.

5. Customer care and the supporter promise

The idea of a ‘contract’ or ‘promise’ between fundraisers and supporters that should be clearly articulated is a strong one. The community fundraising project states:

‘A donor charter or statement of principles is fundamental in orientating an organisation around good supporter governance. Respectful engagement, donor first principles, transparency over how money is spent, adherence to communication preferences and quality standards in complaint handling. All of these ensure not only that the charity embeds good practices in terms of supporter stewardship but also ensure the charity shares a common understanding and respect for those fundamental to ensuring the charity’s existence: supporters’ (11d, page 11d.5).

The new ‘My Oxfam’ app has been designed to improve customer care and the interaction between Oxfam and supporters. This is all part of their new ‘engagement first’ strategy (11f, page 11f.6).

Links to other commission projects: Project 16: A distinctive service culture.

6. Emotion and storytelling

‘Nobody gives ordinary donations RATIONALLY, they give EMOTIONALLY’, so states project 11b, page 11b.4, on direct mail. Many other reports highlight the importance of emotion and the use of storytelling to deliver that emotion, but none state it as succinctly as this.

The mass media report discusses the use of negative and positive emotions and the role imagery plays in this realm of fundraising. The importance of not being exploitative is explored as well.

There are a number of recommendations around storytelling in the digital report. As it states: ‘Improving storytelling should be a vital part of your charity’s online communication strategy. It is a difficult aspect to achieve as all donors are different, although making an emotional connection is essential before someone will donate.’ (11c, page 11c.12)

However, 11b gives an important warning about storytelling that fundraisers would do well to heed. ‘Anyone who truly understands the task of story-telling, knows that a story simply doesn’t work unless the reader or listener is absorbed into it, emotionally.’

Links to other commission projects: Project 1: Use and misuse of language; and Project 6: *The use and misuse of emotion*.

7. Involvement devices and products

The old Chinese proverb is relevant here: *Tell me* and I will forget; show me and I may remember; *involve me* and I will understand. This is particularly important for face-to-face fundraising and direct mail, and both projects 11b and 11f give examples of how you can use props and connection devices to create a better experience for supporters:

‘Some of them are physical, like the flag in the Royal British Legion mailing that will be taken across the Channel and planted on Sword Beach with the donor’s good wishes, 70 years after the D-Day landings. There’s also the piece of string that connects a child of four undergoing radio-therapy, when his mother has to be on the other side of a lead door. A tug from each encourages both and the child remains still throughout the treatment.’ (11b, page 11b.4).

‘UNICEF used a doll that all members of the public that stopped would be asked to hold. The doll weighed the same as an average baby born in the western world. As the fundraiser spoke to the potential supporter about the dangers of malnutrition in the countries where they work, they were asked to hold another doll, weighing far less, representing the weight of a child born in such conditions. The ability to simply compare-and-contrast the unfairness of the situation, through the doll, helped to demonstrate the importance of supporting their beneficiaries.’

Additionally, we should make compelling offers and products to our supporters. Think child sponsorship, make a blind man see, stop child cruelty, etc. The mass media report discusses WWF’s animal sponsorship product, which has raised millions globally:

‘This is a strong advert with good eye contact from the beneficiary into the camera, and therefore to the viewer. The need and urgency are clearly explained in the advert in the footage of animal skins. The voice over is strong and clear and it grabs your attention. The benefits of membership are clearly shown and described. The price point is attainable at £3 a month. The product is something which provides some fun and education for a child.’

Links to other commission projects: Project 2: *Fundraising and vulnerability*; Project 4: *Thank you and welcome*; and Project 12: *Inspirational creativity*.

8. Design, usability, copy-writing and readability

For individual giving that relies on the written word (direct mail, online), the quality of the writing is important.

11b has a checklist for both writing and designing appeal letters. There is no point writing a great appeal if the design makes it hard to read or incomprehensible!

Many of the same rules also apply to online communications, and 11c has another checklist of writing and designing websites and online communications.

Additionally, making it simple to donate is crucial. Too often potential supporters give up before completing their donation. This can often be relatively easy to improve, as the following example shows: ‘One example comes from the JDRE. They increased online donations by 18%, by eliminating distractions from its landing page to make the donation path clearer, reducing the number of steps needed to complete the donation process, rephrasing its confirmation email in more friendly language and making its website mobile-friendly.’

Links to other commission projects: Project 1: *The use and misuse of language*.

9. Transparency, compliance and respect for supporters and beneficiaries

Given the nature of the commission, this is almost a given. However, many reports suggest that fundraisers go beyond the law and fundraising regulations to deliver a great experience.

In the digital fundraising report, there is a whole section on how to comply with online marketing regulations. Whilst the community fundraising recommendations urge transparency: **‘Be transparent about how the donor’s money is being spent and/or the rationale for decision-making.’** (11d, page 11d.4).

For telephone fundraising it is important to: **‘Be respectful** - conducted with consent from donors, and conducted at times that are welcomed by the donors’ (11e, page 11e.3).

Furthermore, it is important to **‘Recognise potential vulnerability** in both those being contacted and those planning and making the calls. The telephone does not afford any visual indicators that vulnerability may be present and therefore callers must be trained to recognise and supported in their handling of these calls. A vulnerable people’s policy which safeguards donors, beneficiaries and staff should be created and adopted.’ (11e, page 4).

Finally, the mass media report (11a, page 11a.4) also urges fundraisers to respect beneficiaries in their portrayals in appeals. Fundraisers need to show reality, but avoid exploitation.

Links to other commission projects: Project 2: *Fundraising and vulnerability*.

10. Integration across channels

The final theme is on the importance of integration. Further thoughts follow, but it is worth highlighting the UNICEF case study in the face-to-face report: ‘UNICEF gave a great insight in to how they had managed to collaborate on their Safe and Warm appeal, and build a single concept. This proved to see a considerable uplift in acquisition of new supporters across all their channels. By taking a ‘total marketing’ approach to their public facing communications and fundraising, they saw members of the public walking up to their teams in private sites asking to be signed up.’

Telephone fundraising is also relies on integrating with other fundraising channels: ‘The telephone should be used to **engage** with donors and supporters to build true relationships and should not be solely used as a fundraising channel in isolation, (11e, page 11e.3).

Fundraisers also need to work closely and integrate with other departments across their organisation.

11a

Campaigns that strengthen relationships with donors

Project 11a. Mass media

James Allport, Craig Linton and Dan Beacon, April 2017

For senior management and trustee boards, this project will:

- Help their understanding of how fundraisers use insight to develop fundraising propositions, products and promises.
- Introduce them to the key components of a successful mass media advert.
- Explain why the first donation is only the beginning and how it pays to invest in the ongoing donor journey.
- Show why emotion is at the heart of successful fundraising appeals.

For donors, this project will:

- Increase opportunities for donors to be inspired and moved to give by emotionally compelling mass media appeals.
- Reassure donors that, when they see a mass media fundraising advert, it will be a true representation of the problem, be respectful of the beneficiary and deliver on the fundraising promise.

Project introduction

The Commission for the Donor Experience set out to consider how mass media fundraising can engage donors to give them a great experience. Our focus is to ensure fundraising flourishes long-term and is focused on long-term results. We are also considering how we can work better as a sector to deliver best practice guidance so the charity sector can adopt the principles laid out to deliver effective donor recruitment and a satisfied donor.

To do this, we have drawn on a range of experiences of practicing and putting in place best practice mass media fundraising campaigns from industry professionals. We have also spoken to donors and reflected their views where appropriate.

We need to consider that mass market media does not lend itself to a one-size-fits-all best practice guide. The brand position, budget, fundraising product and area of work will greatly determine the approach your charity takes.

Summary guidance

The summary breaks down the area of mass market fundraising down into six elements which are listed below with some key bullet points. There then follows more detail in the report. These steps should be followed with the four below principles in mind to guide the overall project:

- Honesty of presentation of the problem
- Honesty of the ask
- Respect for the beneficiaries
- Fulfil a supporter promise

Six steps for delivering mass market appeals with a good supporter experience

1. *Insight*

- Researching both internally and externally into your charity and the work you do
- Audience research: what motivates the groups you are trying to reach?
- Is your cause right for mass market or would below the line for other fundraising methods work better?

2. *Proposition, Products and Promise*

- Establish and test a fundraising proposition
- Create a donor promise that shows the work the donation is doing. For example, adopt a tiger for £3 per month and we'll send you updates on our conservation efforts. Please note, donor promise is used here in a different way to a donor charter, i.e. we promise not to share your details with third parties.
- Identity a proposition and create a product

3. *Materials and Media*

- An advert that grabs the attention and is compelling
- Creative checklist
 - Make eye contact
 - Tell a story
 - Show need and solution
 - Set up the donor promise
 - Disrupt the audience
- *Media*
 - Target the right audience in the test
 - Refine and repeat to deliver value

4. *Planning the Donor Journey*

- Plan of communications to the donor
- Starts with the first contact
- Thank people regularly
- Focus on retention more than upgrades

See CDE project 5 – *The supporter's journey*

5. *Use of emotion and imagery*

- Show reality but avoid being exploitative
- Carefully consider the tone of voice and visual approach for your appeal and the balance of positivity and negativity

See CDE project 6 – *The use and misuse of emotion*

6. *Measuring Donor Experience*

- Value the retention of supporters
- Focus on donor satisfaction, measuring positive responses, lack of complaints and engagement with the charity

See CDE project 3 – *Satisfaction and commitment*

11b

Helping your donors to love what you send them through the post

Project 11b. Direct mail

Craig Linton, Stephen Pidgeon and Ellie Topham, April 2017

For senior management and trustee boards, this project will:

- Help the charity's leadership understand the fundamentals of direct mail and its role in a successful fundraising programme.
- Explain why it is important for the board to have oversight of data compliance and data policies.
- Show why emotion is the key element of successful direct mail.
- Introduce them to a range of techniques that will help them assess the quality of the fundraising creative produced by their team.

For donors, this project will:

- Increase the opportunities for donors to be inspired, engaged and entertained when they hear from a charity through the mail. The content will be more emotional and better presented.
- Increase the opportunities for donors to provide feedback on the mail they receive and to give them control over the frequency and content of fundraising mail.

Overview

Everyone who works for a charity does so for the sake of the beneficiary. We provide help where it is needed, whether it's our elderly neighbour, a sick child, a struggling farmer overseas or an abused animal. Right now our shouts for support are drowning each other out – and ultimately only the beneficiary will suffer.

How can we plan better as a sector to avoid individuals being inundated with our communications and ensure that our messages get the attention they deserve rather than all being lost in such a crowded space? How can we plan better within our own organisations and across affiliated causes for net gain for our beneficiaries?

Are we leaning on technique too hard to the detriment of freshness and sincerity? Do all of our communications feel the same to our supporters? What would letters from charities look like if they were truly donor centric? How do we go about creating mailings that supporters look forward to as a means to stay in touch with a cherished cause? Is it true that if you don't ask, you don't get?

What must we do differently in direct mail communication with supporters to create an environment in which we can change the model we work with, to reflect the above? Is a better direct mail experience inevitably a more costly one? Are we too afraid of the pressures of return on investment (ROI) from within our organisations and from the public, to dare to make a change?

Right now, direct mail is a cost effective and valuable key point of contact with supporters and potential supporters. What can the sector do to counter the public perception of 'junk mail and begging letters'? How can we shine a light on direct mail as a crucial provider of funds for beneficiaries?

The body of this report is split into two parts.

- Part one is authored by direct mail specialist Stephen Pidgeon. It offers practical guidance and advice on how to plan and deliver high quality direct mail that will delight and inspire supporters.
- Part two is the result of a workshop attended by direct mail specialists from a wide range of fundraising specialists. It provides advice and examples of good direct mail that fundraisers can consider on how they can improve the donor experience for supporters.

There is also an appendix that features a case study from World Vision.

Summary recommendations

1. Understand direct mail and its role in the wider organisational and fundraising strategy

Direct mail is arguably the most tested form of fundraising. There is over a century of evidence of what works and doesn't. A good starting point is: <http://sofii.org/the-main-areas-of-fundraising/dm-door-drops-and-household-deliveries>. Understand the 'rules' that exist and use these to deliver inspiring mail to supporters.

However, rules are there to be broken and if overused the impact can diminish. For example, the original Amnesty International pen pack (see <http://sofii.org/case-study/amnesty-international-the-pen-pack>) was a powerful appeal about torture. The endless copycat mailings that followed and blindly inserted a pen without context (as it slightly boosted the initial response) is one example of how fundraisers neglected the overall, long-term supporter experience for techniques to drive short-term results.

Work to break down internal silos. Communicate with other departments.

- Ensure all stakeholders/supporter services staff are fully briefed when a mailing is sent so that any feedback from the public can be directed to the right team and an appropriate response given.
- Share your direct mail experience across your organisation – demonstrate how great direct mail can be used in other types of fundraising and communications other than individual giving e.g. corporate, community, marketing.

- Look at models outside the sector to better understand how they combine direct mail with other marketing channels, such as online or email.

Appoint a trustee or board subcommittee to take overall responsibility for data compliance and policies. Make reporting on data compliance a regular agenda item and be clear on the supporter and financial impact of opt in versus opt out for direct mail fundraising.

2. Measurement and data

Measure the performance of all your direct mail and use data to provide a better experience for your supporters.

- Work towards a segment of one – understand supporters through their actions and feedback. Use this insight to treat them accordingly.
- Implement measurement around supporter engagement and lifetime value. Do not focus solely on short-term return on investment (ROI).
- Review your key performance indicators (KPIs) for direct mail. Look at the metrics that commercial and digital marketing use to measure customer satisfaction and sales, and see if they can be adapted for your fundraising.
- Ensure there is not a difference between the messages and creative you use for recruitment and retention.
- Before any mailing make sure you screen your supporter or cold list against a death-screening service, the mailing preference service (for cold mail) and your own internal suppression list. Further information can be found in appendix 2 of the project 11 summary.
- Be ready for the new General Data Protection Regulation (this comes into force in May 2018) and the impending Fundraising Preference Service. Ensure your permission and data handling statements are up-to-date and easily available to supporters.

3. Creative

Be relevant. Few fundraisers write fundraising copy that can truly move donors to give their support. Most resort to the obvious, which is to describe the wonderful work of the charity. Many describe it in great detail and they do it with the rich energy of the enthusiast who knows the work achieves wonderful outcomes.

They forget that nobody is interested in the work...only in the outcome of the work. Actually, most are mainly interested in the outcome that has been made possible by their own kind gift.

Be emotional. Nobody gives ordinary donations RATIONALLY, they give EMOTIONALLY.

So when you are telling a story, it will be much more successful if the donor is drawn into the story and emotionally engaged before the story starts.

The concept and offer. Think of the concept as the connection device, in essence, the thing that GRABS attention. There are a myriad of connection devices.

Some of them are physical, like the flag in the Royal British Legion mailing that will be taken across the Channel and planted on Sword Beach with the donor's good wishes, 70 years after the D-Day landings.

There's also the piece of string that connects a child of four undergoing radio-therapy, when his mother has to be the other side of a lead door. A tug from each encourages both and the child remains still throughout the treatment.

Other classic fundraising offers can be found on SOFII. Three of our favourites are 'make a blind man see', 'buy a mosquito net' and 'sponsor a child'.

Remember, an appeal is about the donor, not about the charity. The concept is delivered in words and images, and it connects to the reader's emotional core. Once you have the concept, then you can start writing.

Be distinct. You should develop a unique reason to give that is clearly articulated in your direct mail.

- Try to sum up your proposition in seven words.
- Imagine your communication without a logo – what about it makes it uniquely yours?

Be interesting. Only communicate if you have something to say. Surprise supporters - tell them something new and unexpected. Make it relevant to them.

Take a step back and be critical – in fact be brutal. Before you send anything ask yourself: Is this new information? How is it relevant to the person I'm sending it to? Does this excite me? Am I proud of it? Would I be excited to talk to someone about this over dinner?

4. Compelling copy-writing and designing for response

There is a list of 'do's' and 'don'ts' of copy-writing and design in the 'Direct mail that works' appendix. Additionally, further reading and resources to help you write and design compelling appeals that raise lots of money are listed in the body of the report.

It is important to remember that the majority of respondents to direct mail fundraising are over 60. Fundraisers should write and design their appeals accordingly.

To improve the supporter experience, all fundraisers should be aware of the work of Professor Voegele on how people read direct mail (see a brief overview on the Happy Donors blog: <http://happydonors.com/?p=333>) and Colin Wheildon on design and readability (see Ken Burnett's summary on SOFII: <http://sofii.org/article/sorry-but-youre-just-not-my-type>).

Additionally, free tools such as the Hemingway app <http://www.hemingwayapp.com/> can be used to give an indication on how readable and accessible your writing is.

5. Listening, feedback and outstanding customer care

Be a good listener. Try not to assume too much about supporters. Listen to feedback and ask for supporters' opinions

- React to what donors are telling you – speed is key.
- Talk to supporters before taking big actions.
- Make it a relationship and a conversation.
- Have a strong complaints handling process. Encourage supporters to tell you their gripes and encourage feedback. There is lots of evidence that successfully resolving complaints increases loyalty and retention.

Be human. Offer a personal connection to the cause, by introducing supporters to the individuals within the charity that they may deal with.

- Name contacts in your direct mail so supporters know who to ask about any queries or to make a donation over the phone.
- Look for opportunities to get non-fundraising staff and volunteers to speak to your supporters. For example, some charities hold 'thanking days' where everyone is encouraged to call or write a thank you note to supporters.

Be open, honest and transparent.

- Share the impact of donations – both successes and failures.
- Be clear on campaign objectives – both internally and with the recipient.
- Be ready to share information on data you hold.

11c

Using new media to grow engagement and loyalty with donors

Project 11c. Digital

Henry Rowling, April 2017

Reviewed by: Laila Takeh, Paul de Gregorio and Vicky Reeves

For senior management and trustee boards, this project will:

- Show how it will pay to invest in digital fundraising and show the need for a digital engagement strategy.
- Remind them that the fundamentals of fundraising digitally are the same as other forms of fundraising.
- Emphasise the importance of usability and accessibility. In particular, senior management should know that over 50% of traffic comes from mobile phones and tablets. Content must display well on these devices.

For donors, this project will:

- Reduce frustration when they can't find information about a charity online or the content is not in an accessible format.
- Reassure donors that the experience they have giving online will equal to, or better than, the experience they have offline.
- Make it easy for donors to contact digitally the causes they care about.

Summary guidance

This guidance is intended to help fundraisers, supporter engagement staff and the organisation you work for to design better online supporter experiences that engage and delight them. If you follow these steps:

- your supporters will learn more about your cause and how they can help
- you will increase supporter engagement with your cause online
- you will grow the loyalty of your supporters to your organisation through obtaining up-to-date, compliant permission for future marketing
- loyal and engaged supporters may go on to advocate for you through digital and mobile channels and take on an ambassadorial role

Executive summary

Fundraising and engagement via digital and mobile communications channels offer numerous ways to speak to supporters and prospective supporters about the great work your charity does. Through rich and interactive content, you can tell stories directly to the people that matter, who sustain your organisation and beneficiaries. There are a number of low-cost, practical steps you can take detailed in this paper to drastically improve your supporter's experience of your organisation online. The possibilities of fundraising through online engagement change rapidly, so you should constantly review and improve your objectives, goals and infrastructure in this area. Learn from your supporters, peers and the world around you.

Top-level guidance

The following guidance is intended to provide highly practical steps you can take within your organisation to improve your supporters, online experience and to increase your reach to prospective audiences. Very few require major financial investment.

Below is a summary of the main steps. Further details and examples can be found after this summary.

1. Strategic steps

1. Create a digital engagement strategy for supporters and prospective supporters. This should set out a vision and some high level goals for online engagement that is supporter centric and will create interesting stories about the work you do.
2. Take time to find out and understand the interests and motivations of donors. You can then design the optimum online experience from there. This will help you create content and assets (such as video and pictures) that can play a role in their life and address a need they may have. Without that information you are guessing and hoping.
3. Review new technologies and hardware/software as it is released. Ask: can this add to the supporter experience? Don't be seduced by new things. Think always: how can this improve the supporter experience. If you can't answer this, then don't do it. See page six for a checklist.
4. Consider if your hardware and back end setup enable an enhanced supporter experience? Are your systems integrated so that data flows allow a single supporter view?
5. Have a clear Search Engine Optimisation (SEO) and Pay Per Click (PPC) plan. This will allow supporters and prospects to find you online and discover information about you. If you don't have any budget for PPC, concentrate on improving your SEO.

2. Implementation

These steps will bring your strategy to life and help you plan your future work online.

1. Physically map the full and various journeys for supporters through all your communication streams. This should be done for online and offline channels together. Do not separate journeys by channel as increasingly messages are seen across multiple channels within integrated campaigns. You can do this at low cost with sticky notes and a large room. See CDE project 5 – *The supporter's journey*.
2. This will help you understand the online experience from the supporters' view and consider if the journey is something that you would consider to be positive, rewarding and inspiring.
3. Ask for consent for online marketing in a compliant way. If you can't communicate to supporters through email, mobile or app, then any communication plan is flawed from the start. The Direct Marketing Association or NCVO websites are good starting points to establish how to do this.
4. Test the best frequency of communication for each supporter. Some will prefer lots of regular contact; others less so. You can use measures, such as unsubscribe rates, open rates, bounce rates, time and spent on page, to judge engagement with your content. The data can inform the optimum frequency – and test different approaches constantly. See CDE project 13 – *Giving donors choices and managing preferences*.
5. Focus on accessibility This includes language, design, legibility of fonts and font size on web pages and in emails.
6. Test your content in multiple browsers before you launch something new. If supporters can't read or work the asset you build, it won't satisfy them.
7. Focus on telling stories. Supporters want to know the stories of the people or issue they are helping. Using emotions, real stories, and strong photos and graphics is key. See CDE project 1 – *The use and misuse of language*.
8. Test usability regularly – 47% of donors trying to make a donation online don't finish. Publish statistics and graphics showing exactly how donations are used.

9. Use social media to have conversations with supporters and to tell stories in a human way.
10. Plan your email marketing. Well-targeted email communications can keep supporters up-to-date with what your organisation does. You should segment your email lists as much as possible to tailor content to the specific interests of the cohort. This will increase engagement and the number of people taking positive calls to action

3. Best practice

These steps can be considered best practice. If you have limited resources available, they are less crucial than the steps above but should still be considered:

1. Design mobile first, since website visits from mobile devices overtook traffic from desktops in the UK in 2015 . Your supporters use mobile devices and therefore your content must display well on those devices
2. Use surveys on your website – to understand more about motivations, interests and how the supporter learned about the page/work. This will allow you to design better content and journeys
3. Use warm, conversational, short sentences and non corporate language online. People have limited time – they will only scan sentences.
4. Encourage your staff to attend cross-sector events and network with other people engaged in producing online content for supporters. You can pick up many tips and low cost ideas from such activity.

If you follow this approach – we are confident you will have happier and more engaged supporters – who know more about your charity and the work you do. This will create greater value to your organisation in the form of enhanced levels of engagement, campaigning, volunteering and advocacy within peer groups.

11d

Making the connection, bring donors into your own community

Project 11d. Community

Tracy Griffin, April 2017

Reviewed by: Duncan Batty and Craig Linton

For senior management and trustee boards, this project will:

- Explain the benefits of community fundraising and show how good community fundraising can create an army of ambassadors and influencers for your cause.
- For large, national organisations, show why leadership needs to foster a ‘one-team’ approach and not allow differences between head office and the regions to sour the donor experience.
- Help them understand why investing in strong data management for community fundraising is as important as for other forms of fundraising.

For donors, this project will:

- Give them the power to harness their networks and community to raise money for causes they care about.
- Show they are appreciated and valued for their contribution through inspiring thank you’s and invites to gratitude events.
- Improve charities’ communications with community donors by giving multiple ways for them to engage with them, both online and offline .

Introduction – what is community fundraising?

Community fundraising is sometimes referred to as regional, local or volunteer fundraising, and it encompasses a broad spectrum of fundraising work that takes place either online or offline in the community. It is sometimes referred to as: ‘mobilising people in the community either individually or through groups to raise money for particular charities.’ The core of community fundraising is generally volunteer-led fundraising, whereby individuals and groups organise or participate in activities and engage their local communities to raise charitable funds to fulfil a need.

Community fundraising provides an opportunity for engaging people beyond direct marketing, and it allows people to be and to feel very much a part of the charity. Face-to-face communication with individuals and groups provides a personal experience of the charity and, in the same way, community volunteers and fundraisers are often heartfelt ambassadors for the cause with tremendous scope for influencing across the community at all levels. This vast influencing potential is at times overlooked if a focus is driven only to bottom line cash return on investment (ROI).

Supporters are often empowered to do more for the charity as their personal understanding of it and connection to it grows. Often it is the place where the beneficiary and the donor overlap, providing closure for relatives who may be fundraising for a cause a loved one has suffered from.

People are driven to support each other and this is none more visible than in community fundraising: responding to need and emotionally connecting to each other.

It is the very essence of charity, existing not as an entity in itself but as a conduit to connecting the person who wants to help to the person in need.

It makes sense, then, for the donor and beneficiary to be at the heart of any approach and at the centre of any charity

Community fundraising offers people an opportunity to:

- Engage in and connect to people in their local communities
- Give back and to emotionally connect with those around them who need support.
- Find and spend time with people who share their values
- Be seen to be doing good (it’s far less private than giving)
- Make a lifestyle change
- Regain confidence for whatever reason
- Use skills they are unable to use in a work or home setting and to learn new ones
- By reflecting these needs, we can design a supporter experience that is amazing for the community fundraising ‘donor’ or ‘volunteer’.

Summary Guidance

Donor engagement

Enabling community fundraising to thrive, requires an open minded attitude and culture that flexes to a multitude of needs, as listed above. It also requires robustness. There will be times when the desires and intentions of a volunteer / fundraiser are at odds with those of your charity. The role of a community fundraiser is to maximise support for the cause, and, as such, it is important to manage volunteer intentions and at times to decline the offer of support or better to direct elsewhere where the support is more fitting.

The following approaches will, we believe, enable a culture in which community fundraising will thrive. The words in italics are from quotes given by donors. Advice and examples of how to implement these approaches follow in the body of the report.

1. Listen to donor motivation for supporting your charity and use this to inform your interaction with them.

'I've loved being a part of this charity. They're clever and seem to know exactly what I'm interested in and offer me new opportunities without asking. This is what has made me stick around.'

2. Connect donors to the people or cause they are here to support in the way that works for them. Inspire them. Make sure you have a very clear and succinct narrative about why your cause matters, and what difference people's support can make. If possible, organise open days so that donors can see first hand the impact of their donations.

'I belong to a number of charities but the one I like best is x. They tell me stories; tell me how I'm helping. Help me understand the problems they face. I feel I am really helping something worthwhile. I even get links to films on YouTube. With some of them I don't really hear much about the people; it's mostly a bit dry. I love x.'

3. Nurture the relationship as you would a 'new friend'. Amplify insight and use this understanding to flex the communications.

'I like that the charity I support brings me more into the inner sanctum now that I have been with them for a while. It makes me feel part of a team. I don't feel an outsider. I feel they respect me for being a donor for so long.'

'The fundraiser introduces me to new people and new opportunities. I love she does that and she knows what I'm like.'

4. Value the contribution in the way that works for the donor.

'One charity sent me a hand written thank you. That's so rare nowadays.'

'I don't need thanking but I do like to know the impact of my contribution and x does this well without patronising me.'

5. Make it easy to support you by offering easy and flexible ways to support.

'Some charities are really hard to support. I like x because there are lots of easy ways to support, some of which you can download. They even provide templates of posters for you to use and lots of fun ideas you can make your own. There's a helpline you can call for any other information you need and you can always get through. I can also volunteer to help others. It's so easy.'

6. Remove organisational issues from the relationship

'I stopped supporting one charity because I felt stressed that they wanted me to raise more money all the time. I liked the fundraiser but I felt I had to do more and more and it took the fun out of it for me.'

'The fundraiser moaned a lot about HQ. That wasn't great.'

7. Be responsive and do what you say you will do.

8. Be transparent about how the donor's money is being spent and/or the rationale for decision-making.

'While I don't always agree with what they do, I respect that they take time to explain their point of view and I trust them.'

(The quotes come from interviews with community volunteers across a number of organisations: Marie Curie, NSPCC, Save the Children UK, Shelter, BHF and other community staff in a variety of charities.)

How the charity can create the right conditions to make community fundraising work and deliver a strong donor experience

1. Trustees should take responsibility for setting the charity's culture by putting donors at the heart of the organisation's thinking and engaging in the donor programme.

Trustees have a duty to support and understand all methods of fundraising. It is the responsibility of the Director of Fundraising to properly articulate fundraising methodology and for trustees to take time to understand and support this area of governance (as listed in CC20 of the Charity Commission's Guidance for good governance). Long-term investment and ambassadorial support are critical to enable community fundraising to thrive and to meet the donor charter (see next point). Too often community fundraisers are subject to volatile income investment and excessive focus on the bottom line without sufficient understanding of the breadth of benefits community fundraising brings to an organisation (see above).

2. A donor charter or statement of principles should be built into the organisation's DNA.

A donor charter or statement of principles is fundamental in orientating an organisation around good supporter governance. Respectful engagement, donor first principles, transparency over how money is spent, adherence to communication preferences and quality standards in complaint handling. All of these ensure not only that the charity embeds good practices in terms of supporter stewardship but also ensure the charity shares a common understanding and respect for those fundamental to ensuring the charity's existence: supporters. There are some excellent examples of good supporter charters: Save the Children UK, RNLI, Cancer Research, NSPCC, and Shelter, all of which are available on their websites.

3. A strong database management infrastructure is critical in delivering growth in community fundraising.

A specific example of this is when the Institute of Fundraising changed the Fundraising Code of Practice in August 2015. It stated that no donor who was registered with the Telephone Preference Service (TPS) should be telephoned without the explicit consent of the donor. This was clarified by the Information Commissioner's Office (ICO): a donor has to give their explicit consent, either in writing or in a recorded phone call, for a charity to ring them. This consent would 'override' the TPS: implicit consent – e. g. a phone call between donor and charity in which the donor doesn't object to a phone call – is not sufficient to 'override' the TPS. The process for recording and maintaining consent to contact a donor is critical for the relationship between charity and supporters through community fundraising.

4. Technology is emerging as a key opportunity in inspiring and engaging donors in a positive way that supports donor engagement at a distance. Organisational IT infrastructure and readiness are critical in stimulating agile, responsive and relevant communications.

Charities are starting to use virtual community spaces as a mechanism for recruiting physical fundraising groups. One small medical charity developed a fundraising strategy by setting up community fundraising and support groups in response to feedback from its members at its annual AGM. The key method of communication was the charity's Facebook page, which promoted the inaugural meeting of the first group, attended by the charity's CEO and two of its nurses.

This meeting identified several key volunteer roles, as a result of which support literature was developed (e.g. presentation for talks and events, specific fundraising materials) and critical processes were agreed on (e.g. how the charity would promote local events). This generated interest via the Facebook page, and two more inaugural meetings were set up within a week. Twelve months later, the charity had over 10 groups and a growing income stream. What has been key to the success is the use of Facebook through which the groups communicate, promote events and generate support.

World Animal Protection UK developed their Animal Protector campaign, based on in-depth insight

that showed many community supporters wanted to be on the ‘front line’ of rescuing animals. Community supporters receive video footage of animal rescues directly to a personalised website profile. In the same way, RNLI provide real time footage of lifeboats launching, supported by funding from community fundraising groups.

Oxfam has just provided a beneficiary credit card whereby community fundraising groups can pay directly to a beneficiary’s credit card overseas and in real time can see the money being used.

The virtual technology landscape is enabling charities to connect the community supporter directly to the beneficiary and to the cause in ways not previously possible. See CDE project 11c – *Digital*.

5. Organisations should measure the donor experience through supporter feedback mechanisms (e.g. supporter satisfaction survey) collected as part of the performance metrics of the programme.

Most charities undertake supporter surveys in one way or another to ensure supporter feedback about the charity itself and the donor/volunteer’s relationship to it. Understanding the motivations of a volunteer, funder or fundraising group is critical in ensuring connection, support and charity reputation is maintained, as well as being a good way to better get to know the supporter and to deepen the relationship and interaction on both sides. With the regulatory environment tightening, it also provides a route to reconnect with the donor and ensure contact preferences are updated. See CDE project 3 – *Satisfaction and commitment*.

6. Donor principles and value should be a core part of staff recruitment, training and induction across the organisation.

Donors and volunteers are the lifeblood of all charities. Staff training and inductions must include embedding of donor principles and value across the charity, not just within the fundraising department. The Director of Fundraising should work hard to influence the HR department and CEO to embed donor principles and value at the heart of the organisation by including as part of inductions and appraisal systems. It is hard for a fundraising department to thrive if donor principles and value are not held within the DNA of the organisation.

7. Community fundraising staff must be embedded in the charity work and culture. All too often community fundraisers report that they feel remote from ‘head office’ and can become detached from the work and other employees of the charity.

Digital technology makes the connection between community fundraisers with each other and with ‘head office’ far easier than previously. Developing systems to ensure community fundraisers are part of ‘head office’ presentations, external speaker talks, moments of celebration, etc is important to ensure the connection to the charity is maintained. Equally, community fundraisers are at the front line of the charity and ensuring volunteers and beneficiaries are able to share their experiences with those in ‘head offices’ to help embed community fundraisers into the organisation and strengthen understanding and connection on both sides. Skype, Snapchat, Office 365, Facebook live, iPhone videos, etc – are all easy methods to ensure the connection stays strong.

8. Brand marketing and influence to improve the donor experience.

Brand marketing should reflect the needs and aspirations of the donor and be consistent in tone of voice.

11e

How the phone can be used to create amazing experiences

Project 11e. Telephone

Elaine Lee, Adrian Salmon, April 17
Reviewed by: Stephen Noble

For senior management and trustee boards, this project will:

- Help their understanding of how the telephone can be used successfully to engage with donors and supporters.
- Show how the telephone should not be used in isolation, but in collaboration with other fundraising channels and techniques.
- Promote the effective use of the phone by making sure fundraisers have vulnerability policies in place and they undertake regular mystery shopping of calls.

For donors, this project will:

- Give donors choice and control over how they receive telephone calls from fundraisers.
- Improve the quality of telephone calls they receive from charities' by using well trained and supported representatives.
- Improve the quality of telephone calls they receive from charities' by reducing scripting and having more personalised conversations with donors.

Summary Principles

The telephone is a powerful and engaging channel of communication to reach donors and supporters when it is used within a multichannel communication strategy. The telephone should be used to **engage** with donors and supporters to build true relationships and should not be solely used as a fundraising channel in isolation. When contemplating telephone activity, consideration should be given to all steps outlined below. Activity undertaken on the telephone **must**:

1. **Be collaborative and run in partnership** – trustees, Chief Executives, senior managers, fundraisers and agencies (if used) must have **shared objectives** and an **agreed plan** for delivering those objectives. Take time to develop and agree on the objectives and truly understand how they can be implemented and delivered upon at a detailed level. Challenge anything that doesn't 'fit' or conflicts with another objective – and don't give up.
2. **Be evaluated by a wider range of metrics than year one return on investment and take a long-term view** – focus on more than just financial metrics as measures of success. Because the strength of the phone is often most seen in delivering long-term income via Direct Debit, year one metrics are rarely appropriate for measuring its success and can lead to poor decision-making. Donor satisfaction, quality of conversations, retained permission for future contact and attrition can and should also be used to measure success. Review campaigns from previous years and look at the development of those donors over time. Campaigns should be an element of the donor journey and do not happen in isolation – look at results and outcomes beyond the specific campaign results. See CDE project 3 – *Satisfaction and commitment*.
3. **Think 'case study'** – plan, analyse and review each activity as though you intend to make a case study to **share best practices**. Question what have you learned from the activity and what could you do better to deliver the objectives and requirements of the donors and the organisation. You can then share and learn from others too.
4. Be **respectful**, - conducted with consent from donors, and conducted at times that are welcomed by the donors. Consider your audience and, if possible, when they believe it would be appropriate to be called on the days of the week and calling hours planned. Use the opportunity to retain consent for continued contact across the multichannel communication strategy.
5. **Give donors choice and control** – allow donors choice and control in how their relationship works. Consent calls are a perfect example of asking donors what they want to hear about and when – from this information charities can determine a donor journey that is relevant, timely and personalised to each donor. Consider using more 'open' or 'range' ask approaches rather than the traditional 3-ask negotiation approach to give the donor choice and control in the level of their donations. See CDE project 13 – *Giving donors choices and managing preferences*.

For example, an 'open' ask would simply be 'How much would you like to give towards this work?'
A 'range' ask would be, 'People we're speaking to are generally giving between £5 and £15 towards this project, what would suit you?', or, 'Would you like to give £10, £30, or £50 tonight?'
6. **Utilise information effectively** – capture, store and utilise donor motives for getting involved with a charity. This information should then be used to guide all subsequent conversations across all channels. Telephone calls can be used to establish how donors wish to be contacted and which 'products' are most relevant to them. The information can then be used to personalise the relationship with **timely** and **relevant** contacts.
7. **Recognise that charities must balance** their duty of care to beneficiaries to ask, against supporters' and potential supporters' right to say 'no'. Donors should never feel unduly pressured to receive telephone fundraising calls, or to comply with any requests made of them. They should have a clear understanding of why they were asked, and they should always end the conversation feeling valued and in control.

8. Be **properly resourced** – whether using an agency, or run in-house, sufficient budget and staff resources should be allocated to the telephone to ensure a quality experience for donors. In particular, agency partners should never be chosen on price alone, but on a range of quality indicators. See CDE project 21 – *Working with suppliers as partners*.
9. Have **well trained and supported representatives making calls** – telephone calls are truly acting as the ‘voice of a charity’ and therefore a true investment must be made to ensure that the callers have a positive environment and experience when making calls. They should be well trained, briefed and supported in their work, and they should be paid above the minimum wage.
10. Be **transparent** – state your purpose of the call *clearly* and *in full* at the beginning of the call. Provide clear signposting throughout as to what will happen next and the options available to the supporter. Don’t try and disguise fundraising as something else. This is in line with the Fundraising Regulator ‘Code of Fundraising Practice’, section 8.3.1.
11. Be **engaging** – telephone calls should involve a dialogue, not a monologue. Plan the conversations and identify opportunities to encourage donors to get involved. Lead donors to value, not fear, the calls. Calls should invite involvement from donors and supporters, and they should avoid replicating a direct mail pack where information is pushed to the donor. Before calling, consider the experience from the donor’s perspective: if you can’t deliver a positive experience, irrespective of the outcome, don’t make the call.
12. Be **natural and flexible** – calls should not follow a set script that must be read verbatim. To achieve a truly engaging call, fundraisers should listen, adapt and have personalised conversations with each donor.
13. **Humanise the experience** – avoid ‘robotic’ sounding scripts being read by fundraisers making the calls. Try to find the ‘joy’ in each conversation and strengthen the connection between donor and charity by delivering to meet the donor’s needs or expectations. For further information, please see the Save the Children case study later in this document.
14. Recognise that donors may also be **service users / beneficiaries** – this can be reflected in the one-to-one conversations taking place.
15. **Be more than just ‘an ask’** – telephone calls should deliver a true value exchange giving the donor rewards that are important to them, in order to retain commitment and engagement for the long term. Calls purely to thank and inform donors of the impact of their gifts can give donors a pleasant surprise, given the paucity of their use across the sector. Consider running consent campaigns to clarify donor consent and use this as an opportunity to re-engage the donor to the cause and mission. Legacy calls to establish interest in and motivations for leaving Gifts in Wills can be achieved without including a financial ask. The insight gathered can be utilised to determine the stewardship path that is relevant for each donor.
16. **Recognise potential vulnerability** in both those being contacted and those planning and making the calls. The telephone does not afford any visual indicators that vulnerability may be present and therefore callers must be trained to recognise and supported in their handling of these calls. A vulnerable people’s policy which safeguards donors, beneficiaries and staff should be created and adopted. Ideally, each charities policy should be publicly available. [Use the guidance provided by the Institute of Fundraising](#) to help shape your policy and seek out external help. You are not the only organisation facing this issue, so do learn from others in and outside of the sector. See CDE project 2 - *Fundraising and vulnerability*.
17. Be **effective and bring resolution** – ensure that all aspects of each call are addressed, including questions raised by donors / supporters. If answers cannot be provided immediately, ensure that someone takes ownership of the outstanding items until resolved
18. **Utilise the information and insight** gathered during the conversations irrespective of the outcome of the contact. Ensure this is contained within data files that are used for follow-up activity, e.g. thank you or follow-up letters. In addition, use the insight when planning and implementing subsequent contacts across all channels employed in the communications strategy.



The richest medium: how conversations can build relationships

Project 11f. Face to face

Sam Butler, February 2017

Reviewed by: Josh Pinder

For senior management and trustee boards, this project will:

- Show why the recruitment process for face-to-face (F2F) fundraisers should be invested in and the benefits of having a highly motivated and committed team.
- Encourage them to see F2F fundraisers as an essential part of the team and provide opportunities to involve them within the wider charity.
- Explain the benefits of investing in retention strategies and not accepting the 'norm' of 50%+ year one attrition.
- Introduce them to a range of inspiration involvement devices that can be copied/built on to enhance the sign-up experience.
- Give the charity's leadership the confidence to defend F2F fundraising, against negative publicity and promote the ongoing benefits it can deliver to an organisation.
- Make them accountable for the behaviour and conduct of F2F fundraisers and ensure there are clear safeguarding and whistle-blowing policies in place. Additionally, they should take an interest in mystery shopping results and compliance against F2F regulations.

For donors, this project will:

- Reassure donors that if they stop to speak to a F2F fundraiser, the experience will be respectful and positive (even if they say 'no').
- Make F2F fundraising exciting and something not to be avoided. This will be done by creating great involvement devices and sign-up experiences.
- Show, once they've signed up, that they are appreciated and valued through inspiring communications that reflect the reason they signed up in the first place.

Summary Principles

The following paper looks at the way the experience for F2F fundraisers, both within agencies or in-house operations, directly impacts the way a supporter then experiences their journey with you as a charity. We will explore many aspects of a F2F fundraiser's journey in the charity sector. From their first interaction with a job advertisement, through to the point at which that they become a bonafide advocate for the charitable sector, moving on to a profession within a charity or agency with a true understanding of how by putting the experience of a supporter at the forefront of their profession, they can help the charity sector to deliver more for their beneficiaries.

At a time where public trust in charities needs to be reinvigorated, and the pride of all those that deliver vital services (whilst the austerity measures that have been taken mean they are now needed more than ever before) it is time we restored a sense of magic to the achievements this wonderful method of donor recruitment can achieve. By changing the methods, we have seen tried and tired since F2F took to the streets and doors over 20 years ago, we can help to engage new audiences in the causes it represents, and realise the true value that supporting a charity in the modern age has for each individual donor and society.

1. Getting the best face for your fundraising.

- a. How and who are we recruiting to be the most publicly accessible face of fundraising? How are we motivating applicants to apply?

Pushing the passion for your cause over the salary and bonuses they will get paid is going to encourage applicants that identify with your work. Improved recruitment should lead to happier donors, as many of the negative connotations that the public have towards F2F fundraising are reduced by an improved experience. Reducing the 'sale' and emphasising the 'experience' through inspiration should remove the sales culture stigma attached to it.

- b. F2F continues to be seen as a temporary role, filled mainly by students or those looking for a stop-gap. This does not lend itself to recruiting a dedicated and passionate individual looking for a career in fundraising, (although those are the ones we look to promote and celebrate). Are we only stumbling across them, rather than appealing to many future fundraising professionals out there? By celebrating the best of those that we recruit, and by changing the way we advertise to fill the roles, we can help to bring the best people in to the third sector, and develop them for future opportunities within the charity sector.
- c. Connecting applicants with your charitable projects and developing their knowledge of the work for which they are generating funds for, is a wonderful way of donors then receiving first hand knowledge of how their donation will be used. Allowing agency or in-house staff access to this will help to improve the donor's experience with the F2F fundraiser they speak with. In 2013, St John Ambulance used beneficiaries of their RISE project as face to face fundraiser's. This meant that supporters spoke with a beneficiary, allowing the face to face fundraiser to also be a living breathing case study.
- d. Improve the information they have on what your charity does. Performing the art of inspiring someone to commit to a long-term relationship with your charity is about having a genuine interest in the cause that you are working on behalf of, and being given the right tools to do it. It is not about selling a 'lift pitch' up to 30 times a day, which means they need to be equipped with a great deal of insight in to what the charity they are representing has achieved in the past, how it was achieved, what the charity wants to see happen moving forward, and how they intend to realise it. They can't be expected to improve the donor's experience, or ignite a sudden desire and willingness to support a charity, by just reading from a script that comes across as yet another robotic person trying to flog an idea. Being a passionate ambassador, and coming across as someone who is genuinely trying to change the world, will have a far more beneficial impact for everyone concerned!

- e. The skills and training they receive initially will stand a F2F fundraiser in good stead, but there needs to be ongoing development and regular training updates to continually inspire them. This paper aims to show you that it is in fact the ongoing support and expertise they gain that will be integral to retaining staff and to the survival of F2F as a fundraising method.
- f. Making staff feel valued will undoubtedly have a positive impact on the public, and especially the supporters that they recruit will feel valued too. Yet despite a concerted effort to move away from days of oversaturated streets, doorsteps and private sites, the existing F2F model still seems to be rooted within a 'stack them high and bleed them dry' mentality for all involved. The fundraisers themselves, the supporters and members of the public who complain all leading to the constant narrative within the media that F2F fundraising is nothing but a menace. How can this narrative change? Help is undoubtedly needed from experts across the sector, and this paper aims to identify where that is happening, and how it being achieved. The role of the F2F fundraiser in changing their own story within the public, and media domains can't be underestimated.

2. Ongoing development of staff.

- a. Provide staff with the right training to enhance the experience that they can give your supporters. Move away from a short-term target-driven culture, and work on improving staff retention within a F2F programme. This can allow you to reduce your recruitment costs and help develop a secure and longer-term culture within the team. The financial model that exists sees up to 50% attrition being budgeted and forecast each year is in-itself almost an admission that the model is accepted in its current broken form.

Setting the standard for fixing this is complex. As Amnesty International in Belgium found when they developed a donor insight programme (see page 23 for a case study on their work with Donor Voice) . From the point of welcoming the supporter to the organisation, they have a system that provides the in-house and agency management with insight on how they can develop staff, improve their retention, and continue their supporter journey with the right messaging, thereby improving their retention of staff and of their supporters. Charities blaming agencies for not hitting Key Performance Indicators (KPIs) on age and average donations is usually a common practice used to explain why retention is so bad. Oxfam UK have done work to debunk this theory, showing that the individual a supporter has spoken to, has far more to do with the retention, than the age or amount a supporter is willing to donate.

- b. Record insights on your supporter's experience through the welcome process. Use this to help develop your face to face teams, sharing best practice to improve 12-month retention. Agencies have now taken the Amnesty International Belgium model and have developed the technology to help assist you with your supporter experience.
- c. Engaging teams within the wider organisation, the history you have, successes in lobbying, and campaigns that have raised awareness. The more they understand your work, the more they can inspire and educate new supporters. There are examples of this being done within the paper. And the theme of face to face being utilised as more than just an acquisition channel, and more of a communication and brand channel can be seen to give demonstrable benefits for the work that face to face fundraising carries out for your organisation, especially when aligned with the wider directorates that communicate to the public, be them brand, communications, marketing or fundraising teams.
- d. Create those you want to keep with a clear career pathway. Fundraiser's do not grow on trees, and they need a sense of the profession of fundraising being somewhere that they can develop and progress professionally. Many of today's fundraisers, and employees within charities, started their journey as street or door face to face fundraiser's. HR departments within charities are employing recruitment teams internally, as the money they must pay recruitment agencies continues to grow. Skill-sets of the face to face teams will vary widely. Many a face to face fundraiser has started off in the profession using it as a stop-gap, or a job-to-do whilst finding employment in their chosen profession. Making sure that they are aware of the opportunities within the charity they work for if your team is in-house, or the one that they are representing through the agency they are employed by, will only help to improve the sector. Internships can be used to incentivise staff, and again bring them closer to the cause that they represent, something St John Ambulance has done with their long-standing agency Wesser.

3. Involvement devices and tools for fundraisers to use.

See also CDE project 12 – *Inspirational creativity*

- a. How can the PR, marketing and communications teams place positive stories in communities where your fundraisers are working?
- b. Digital tools can help immerse the public in your charitable work and improve retention. In the main report, you will be able to see the evidence of how Amnesty International, UNICEF, Médecins Sans Frontières, Save the Children, and Greenpeace have all been using virtual reality to help leverage a greater donor experience. Virtual reality is not the only tool out there. There are also other great examples of involvement devices and props that have helped to engage supporters with the charities story, and place the public in the shoes of the beneficiaries whose need the fundraiser is attempting to meet.
- c. Get your senior management team working with your F2F teams, and see the culture within your organisation change. There are examples from Oxfam, Care International and St John Ambulance that prove where the charities staff give their time to the face to face teams, the benefits of this interaction are passed to the donor, and their experience in interacting with the teams is improved. Face to face fundraising has been receiving a media bashing on an annual basis since 2002. And despite the hundreds of millions of pounds that it has raised over the years, it is only very rarely that a CEO, or Director of Fundraising comes out to defend it.

4. Where your face to face fundraisers fundraise.

- a. Think about the site, street or towns in which the teams are working in, and how to attract the public towards the cause. This is a shift away from the traditional model. Work with your fundraising teams on informing them of relevant news stories and avoid saturating areas. Inform the public through local press releases, your website and across social media that will be in the area. By far the most frequent concern the public have had in terms of a face to face campaign run by St John Ambulance is to check that the people on the door-step are genuine.
- b. Does your charity, or the campaign that they are working on allow your teams access to areas that are not commonly associated with face to face teams. By exploring all the touchpoints that your charity has with the public, you will be able to open new opportunities, bringing teams ‘face to face’ with those that have a common interest with the cause through the location or event where they are able to fundraise. In a crowded market place, restricted by regulation and local council authorities, access to new locations is an important consideration when planning for your face to face program.
- c. Regulation on private sites, the street and doors is currently being updated by the Fundraising Regulator through their ownership of the code of practice. Make sure that you use this as an opportunity rather than seeing it as a reason to stop! Face to face provides you with opportunities to get your brand, messages and an ask to specific audiences, as Save the Children, St John Ambulance, Greenpeace and others are doing.

5. Engaging face to face fundraisers with teams within your charity.

- a. Break down internal silos. Share what’s new with your face to face teams on a weekly basis. Keeping the face to face teams updated with relevant news and stories of the charities work that has gained media interest will help them have a point of reference to begin a conversation with a potential supporter. Making sure that they have been briefed will mean that through a communication process, the public are receiving the correct information, which in turn will help to develop and gain trust in your brand, the individual fundraiser and at best, result in a new committed supporter.

- b. PR, marketing, brand and communication teams can amplify the voice of your charity if you all saying the same thing. You can read in the main report how St John Ambulance has doubled their net income through face to face since 2013 by aligning campaigns with the message on the doorstep. There is also information on how UNICEF's unified approach to their 'safe and warm' appeal helped to lift income across all fundraising channels. Perhaps most importantly for this paper, it resulted in the public approaching their F2F teams to make-a-donation.
- c. If a fundraiser sees your work, they have first-hand knowledge to give supporters. Breaking down barriers internally, and changing staff's opinion of face to face allows people to meet people, ease concerns, and drive a more supporting culture within your charity.
- d. See F2F fundraisers as a human communication channel, not just a human vessel for performing financial transactions! If they meet your beneficiaries, they have their stories to pass on to supporters. If they know about your campaigns, they can promote them and amplify the impact that they have.

6. Giving face to face fundraising positive PR.

- a. Through moving to digital, see how social media can bring your supporters together. The Oxfam App is an innovation that promises many learnings for the entire sector. Similarly, WaterAid and Care International have utilised Facebook to build a stewardship model that allows supporters access when they want it.
- b. Train teams in first aid. St John Ambulance and the British Red Cross have both had media stories picked up demonstrating that by aligning their cause with their F2F teams, that face to face gains some positive media attention. What if all face to face teams were seen by the public as being potential life savers in their neighbourhood, in the local shopping centre or on their high street. By changing the narrative, and image, would the Marmite factor (people wither love it or hate it) decrease? Like all new ideas in fundraising, it must be one that is at least worth testing to see the results that it generates, doesn't it?
- c. Offer more than just a direct debit, and never saying 'no' to an offer of support. As face to face becomes more widespread across the world, customer relationship management systems are being used in Australia and in the US, which means that every conversation that a member of the public has with your F2F teams can lead to a relationship of value. It might not generate the traditional direct debit, but it is providing a donor a way in to your organisation that suits and works for them.
- d. Signpost potential supporters to the rest of what you do. Help people understand your cause. Make people ambassadors for your cause.

7. Safeguarding your face to face fundraisers and the donor.

- a. How you can make mystery shopping your teams about more than just a deterrence? By developing a process that improves the supporter's experience, brings the wider employees and staff in to the world of the fundraising team, so you can help support the communication of your face to face program on a local level.
- b. Having been accused of targeting the vulnerable in a national newspaper in 2015, St John Ambulance now has a digital audit trail for all staff who fundraise for them face to face. A recruitment process that involves tests on the vulnerable, ongoing training modules, and helps to identify those that can be tracked in to senior positions, they turned a negative experience in to a positive development with their agency partners.
- c. Move away from seeing success just based on sign-up rate. By bringing other measurements in to play, and using the F2F contact to promote campaign and lobbying messages, the retention of supporters can improve, along with the engagement that the public has with the wider marketing work of the charity or NGO. Using media centres on PDAs, stands in private sites and a digital welcome process, donors can experience more of what the charity has to offer through a digital journey.

- d. Promote the best to leadership roles based on retention. This hasn't always been possible, as the short-term nature of employment within face to face has not allowed it. But as retention of staff improves, and the culture of an agency or in-house team becomes about rewarding those that recruit's donors that stay with the charity, rather than the number of supporters a face to face fundraiser can achieve per hour (sign-up rate), fundraiser's can be held up as a great example for their retention.

8. Welcoming the donor, and the follow-up communication.

See also CDE project 4 – *Thank you and welcome*

- a. By asking new supporters for a little more information, and saying thank you as well, the alignment of a good telephone programme with a F2F programme can prove valuable to the donor and the charity. It helps to place the relationship on a firm foundation, and it makes sure that the ongoing supporter journey is one that the supporter wants.
- b. As referred to earlier, the Donor Voice model initiated at Amnesty International Belgium is about gathering information on the fundraiser and the supporter, and investing in insight to improve retention.
- c. In moving the 'total marketing' culture to create a total fundraising one, charities are improving how their message resonates with the public and individual donors. This was demonstrated brilliantly by Louise Lane from UNICEF and Sinéad Chapman from fundraising agency Open at the 2016 Institute of Fundraising Conference, held at the Barbican.
- d. Don't bombard your supporters with requests to donate or with communications. Listen to what they have to say about you as a charity, and ask them how, when and what they wish to hear about. By treating them in the way that they wish to be, you can see an instant uplift in their support for you, be that through the lifetime value, the retained support, or the opportunities that they can give you access to through their contacts.

9. How to ensure good practices are upheld.

- a. Use your data to engage your supporters, and gain insight as to what they want from you in the future.
- b. Have contracts and agreements with third parties that hold you both to developing a relationship that will benefit you both in the long term. The Fundraising Regulator continues to roll out changes in the way that you must work together. By taking stock, and working with your partners to amend contracts to fall in-line with the regulations, identify the areas where new processes can enhance the donor's experience. Take a practical approach to implementing them, so the benefits can be mutual for you and the agency, and result in providing the donor with an experience of supporting you that lifts F2F fundraising's reputation, and that of the sector.
- c. The auditing of your agency should become a regular habit. St John Ambulance started doing this in 2009 on an annual basis. This has now evolved into a regular monthly process, and the benefits that it has had to the partnership between the face-to-face agency and the charity.
- d. Training days and the induction of staff is one area that improves the experience that your F2F fundraisers pass on to your supporters. Regular seminars allow you as the client to get to know your agencies' staff and the problems they must overcome daily when faced with their interaction with the public. By listening to what the public are saying to your fundraisers, and acting as a conduit of information to other departments within your charity, you can identify solutions to help raise the experience that supporters and non-supporting members of the public have with your brand by improving its reputation in the marketplace.

- e. Be prepared to learn from other agencies and charities. In January 2012, a small working group was set up for F2F agencies, in-house teams and charities. The regular meetings and networking opportunities that this has provided to all of those that attend is discussed below. Remember that one model of face to face does not fit us all. The group has benefited by the sharing of best practices, the solutions that each have implemented and the findings of those outcomes has allowed everyone to benefit. By making your F2F model an extension of your charity's personality, it dilutes the sense that face to face is just the same in a different jacket. Props, give-aways, media content and the place or event where the F2F fundraising is taking place, all impact the donor's experience. By taking a creative approach, the variety of engagement is changing F2F fundraising for the better. Within this paper there is further insight, case studies, processes and techniques that will help you to improve your F2F model, and the experience that everyone has when engaging with your teams.

12

How the creative process can help charities focus more on the donor

Project 12. Inspirational creativity

Reuben Turner, April 2017

Reviewed by: Matthew Sherrington

The original brief

Because fundraisers deal day in, day out with dramatic, emotional, often life and death issues, there is more scope for innovation and creativity in fundraising communication than in almost any other area of commercial endeavour. But what are the implications for the donor experience? This project will seek to define both the potential and the desired standards for creative endeavour, and it also will attempt to define the ethical dilemmas around creative messaging with a view to improving understanding of what donors might find acceptable and unacceptable.

For donors, this project will:

- Show why deciding the stories you choose to tell about your charity is an ethical, as well as a creative, decision.
- Explain the benefits of having clear guidelines in place for fundraising creativity.
- Show how it will repay to invest in giving donors real choice.
- Explain the benefits of combining fundraising and brand guidelines to improve the donor experience.
- Encourage them to take an active interest in the creative agencies fundraisers' use and to treat the agencies as strategic partners.

For donors, this project will:

- Reassure donors that when they hear from fundraisers, they will be told the truth. This will make them feel they have entered into a clear and fair exchange.
- Increase opportunities for donors to be inspired by making them part of the story and solution.
- Reduce the chances that donors will be irritated by impersonal approaches and the overuse of jargon or corporate language.
- Provide transparency to donors on what is happening with their money and their data.

1. An introduction. Why inspiration? Why creativity?

Inspiration

What a strange and slippery word. Often it's been used to justify fundraising that persuades people to act at any cost, or to suggest that fundraising communications should be somehow uplifting. Here we propose returning to the latin root of the word – to 'breathe life into'. Fundraising communications have a powerful role to play in 'breathing life into' stories, issues and causes.

Mark Zuckerberg once said 'a squirrel dying in front of your house may be more relevant to your interests right now than people dying in Africa.' The role of inspirational creativity is to tackle that pervasive sense of distance, otherness and apathy – to bring issues, causes and stories to life and let their essential truth live right in front of us, in the here and now.

Creativity

Another slippery beast. There is creativity everywhere in fundraising. There is creativity in defining a proposition, in writing a strategy, in setting a direction. Here we take it to mean the application of words, sounds and moving or still images to fundraising stories that are presented to supporters (existing or potential).

Ethics

Creativity is closely associated with storytelling, and this means it's often at the sharp end of the ethical dilemmas faced (and sometimes ignored) by fundraisers. Every time we crop an image or choose one word over another, we're making not just a creative decision, but an ethical one.

Creativity, then, can be a tool for bad fundraising as well as good. It can obfuscate or oversimplify, it can ignore inconvenient truths or, at its worst, make outright lies sound like the truth.

That uncomfortable truth needs to be laid bare – we must take responsibility for the creative decisions we take and their ethical ramifications.

Technique vs truth

Creativity in fundraising has often been mistaken for the application of fundraising techniques to the truth. In other words, adding ask prompts, 'nudges', underlining, handwriting fonts and rhetorical techniques.

Truly inspirational creativity needs to be more about 'bringing the truth to life' – making it more real – than applying a set of predetermined rules that maximize response at any cost.

Formats vs ideas

In particular, creativity in fundraising has sometimes been relegated to the application of trickery. Sending coins and other premiums through the post, creating fake reports from the field, surveys that aren't surveys or urgent appeals that aren't urgent – these are all the use of creativity to create fictions rather than tell truths more effectively.

2. Method

16 February 2017, several creative directors closely involved with fundraising gathered to discuss the issues, principles and outcomes that a creative commission would like to see. It was a chance for those at the ‘sharp end’ of fundraising – those closely associated with delivering it – to say what they’d like to see change, and how.

Attendees: Wainani Dombrowski, Bluefrog; Bob Nash, WPN Chameleon; Christopher Nield, On Agency; Matt Crutchlow, Open; Simon Lane and Lynsey McMorrow, Arthur London; Reuben Turner and Andy Powell, GOOD; Ian Boardman, Consider Creative.

3. Principles

Principle 1

Inspirational creativity is about telling the truth, not hiding it.

We should aim to produce communications that leave supporters feeling satisfied as well as inspired. That doesn’t mean making them happy or telling them how great they are. It means making them feel they have been told the truth, well, and entered into a clear and fair exchange with the charity.

Recommendations

- Measure more than just short-term response – measure loyalty, engagement, lifetime value and supporter satisfaction too. See CDE project 3, *Satisfaction and commitment*.
- Engage in relationships with creative teams and agencies that prioritise supporter satisfaction and inspiration over simple response or 16 February 2017. See CDE project 21, *Working with suppliers*.
- Empower creative teams and agencies to put the needs of the supporter at the heart of what they do.



People are now used to providing instant feedback via apps. Why not add them to our online donation experiences?



Save the Children’s DRTV adverts now prioritise reportage principles over fundraising technique, with the aim of presenting the story in a more authentic way.

Principle 2

Plan for supporter-centred creativity.

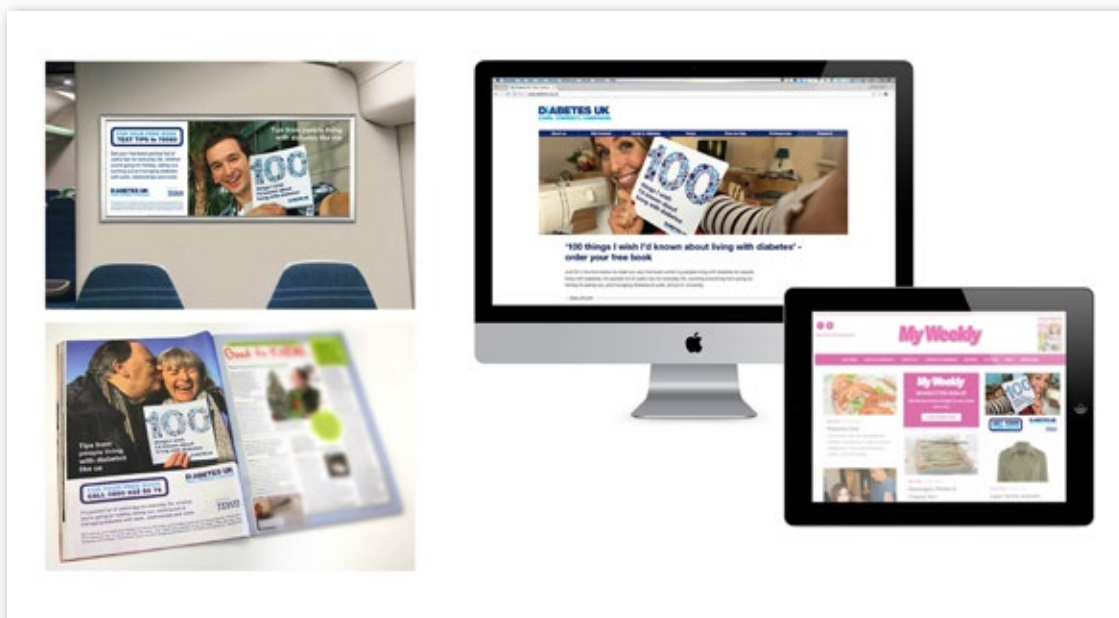
When we're planning communications, we should avoid simplistic segmentation models and pen portraits, such as 'dorothy donors' or 'baby boomers', and seek instead to understand people's very individual human values and motivations.

During that process we should imagine supporters are in the room when we're talking about them. So that our communications treat them as respected peers, not targets to be 'acquired'.

We should seek to be human and personal, which is not the same as using personalization or data. We should speak the language our supporters do, not NGO jargon or corporate language. See CDE project 1, *The use and misuse of language*.

Recommendations

- Review the language of fundraising strategies, agency and creative briefs to make them as personal and approachable as possible – reducing jargon and writing our briefs as though a supporter will read them.
- Recruit panels of supporters to review materials – strategies, pen portraits, briefs, appeals – and act on their feedback.
- Where appropriate, engage supporters in telling the story.
- Be brave – trial fundraising communications that have radically human, rather than organisational, storytelling at their heart.



This recent campaign from Diabetes UK engaged people with diabetes to provide the information and advice offered to new supporters – putting people at the centre, not organisations.

Principle 3

We should be clear about the terms of the relationship.

Too much creativity promises an immediate impact (e.g. asking for a single gift, or promising to send a useful guide) when the goal is prospecting or conversion. Where we want more, we should be clear that we seek a relationship, and that the supporter has a choice. Urgency should not overtake honesty about the relationship we have, and seek, with our supporters.

Recommendations

- It's time to lose stock phrases like 'where the need is greatest' and use genuinely transparent language and communications to let supporters know what is happening with their money and their data.
- We should use everyday language to explain the kind of relationships we seek with supporters. They should know that they have every opportunity to manage that relationship (if any) on their own terms.
- We should avoid sales tactics that make the terms of the relationship unclear, or hides it in small print or legal jargon.



The Guardian provides a straightforward reason for readers to become supporters, treats them with respect and appeals to their values.



WaterAid has consistently been honest about its aims – matching its ambition to bring clean water to everyone everywhere, with its ambition to inspire as many people to support as possible.

Principle 4

We should offer supporters real choice - and be proud to do so.

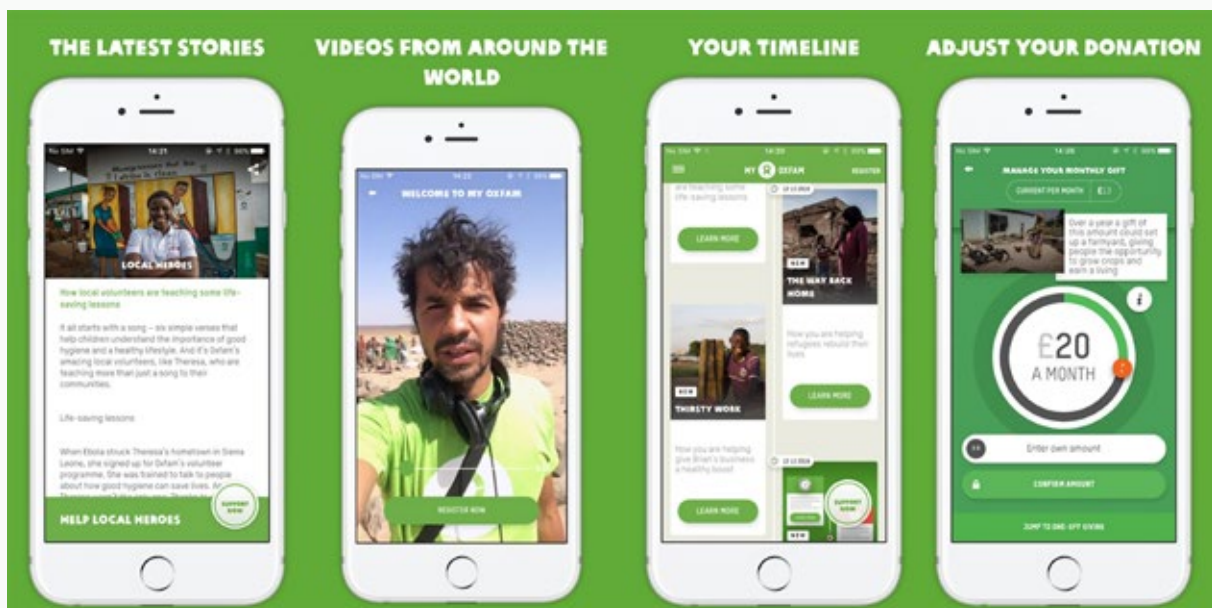
Choice isn't about 'opt in' policies or consent regulation. It's about understanding a fundamental cultural shift in control – from organisations, to individuals.

We should respect that supporters have the right to say 'no', and strive to produce communications that are so good they won't want to. We should give them control over whether, how, and how often we contact or ask them – in the same way they expect to manage their relationship with their bank or their social networks.

We should offer them the choice to give more, or less, than usual. That comes with the acknowledgement that they may support a range of charities and causes, and have other demands on their time, attention and money. We don't have an automatic right to it. See CDE project 13 – *Giving donors choices and managing preferences*.

Recommendations

- Stop hiding behind tiny tick boxes and double-negative opt-outs. Be proud to offer supporters a choice.
- Use everyday language to make their choices clear, and show respect for their agency.



Oxfam's app aims to put supporters in control of their giving and their relationship.

Principle 5

Every organisation should have clear guidelines for fundraising creativity.

Fundraising communications often reach more people than any other function of the organisation. This suggests that every organisation should have its own fundraising guidelines and principles to drive good practice and align fundraising communications to the broader organisational values – and driven by the needs, values and preferences of supporters.

Recommendations

- Every organisation should develop a simple, clear ethical framework for creative fundraising. This guidance should be written into every agency and creative brief. It should cover all channels, to ensure a consistent framework – direct mail, TV and radio, dialogue and digital. It should be a living document, continually adapted to meet new challenges and respond to supporter feedback (collated not individual).
- Both language and imagery (and the way they work together) should be considered. For instance, what images are acceptable, and why? How can captions change the context or imagery?
- It should sit within fundraising regulation but not be a response to it – this is about professional and creative integrity, not following the rules.
- It should be an opportunity for every organisation to differentiate and strengthen its fundraising and bring it closer to the mission.

Like a child, we are not afraid to ask for help. Some adults think asking for help is a sign of weakness. We know it's a sign of strength. We believe that getting a helping hand should feel just as good as giving one.

UNICEF have developed a set of fundraising principles linked closely to childhood.



Dogs Trust has built its brand around positivity, defining support as a positive choice, never one driven by guilt.

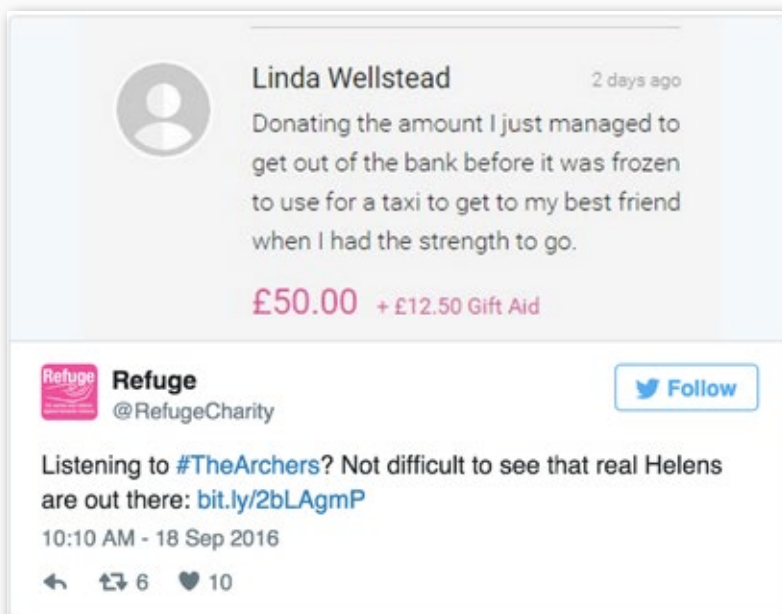
Principle 6

Recognise that the fundraising bubble has burst.

Fundraising doesn't take place in a vacuum any more (if it ever did). Fundraising communications should acknowledge, and where possible integrate with, other communications from the charity, for instance on social media (Facebook, Twitter, Instagram, etc). This isn't just about being effective, it's about telling a coherent story. See CDE project 11, *Communication with individual donors*

Recommendations

- Bring fundraising and brand guidelines together to ensure a consistent experience for supporters – building brands with clear space for effective fundraising is a no-brainer in an age of integrated communications.
- Create the conditions where fundraising, brand and comms teams – and their agencies – can work together with common goals and combine their expertise effectively.
- Use social channels as a way to deliver value, not just extract it – social is not just another direct response channel.



Proof that fundraising is now a powerful force in culture, not always led or delivered by organisations. Fundraising creative should reflect that shift into the real world.

Conclusion

Creativity can be a powerful force for good – inspiring people to change the world they live in for the better. But it can also be a force for short-termism, shoddy tactics and lazy, formulaic thinking. We need to think differently about effective fundraising creative, if we're to bring it into an age where the culture of fundraising has fundamentally shifted.

This will take time. So much of our creative communication is driven by formula that have existed for years, by practices and phrases that are so timeworn we no longer realise we're using them. It will take work to change.

Secondly, it takes work to change 'fundraising that works'. We may be using tricks and techniques that deliver results, but that we're not proud of. It will take integrity and bravery to replace them with something 'better', perhaps in the face of short-term financial losses.

It may well be worth it. Creative fundraising with supporter needs at the centre could look radically different. More honest, more open to failure and more authentic. More exciting, more inspiring, more brave and challenging. In short, more creative.

The Commission is an opportunity to show what creativity can really do for fundraising. It's time to let it off the leash.

13

Giving choices and managing preference

Authors: Tim Connor and Jackie Fowler
'Continuous donor choice'
co-authored with Ken Burnett.

Project Brief

Whether or not charities will be obliged to offer the public choices, there is clear evidence that giving donors practical control over how they relate to and hear from fundraisers can be highly effective in improving the donor experience. This project will look at the systems that have been implemented, how they work and the results they've achieved, with the aim of defining an ideal approach that offers donors practical choices and real control over the shape of their relationship with individual causes.

For senior management and trustee boards, this project will:

- Explain why it may be beneficial to work from a perspective of 'How can we find out what donors want, and use communications to better anticipate what donors would like to receive, and give them choices to meet their needs, so that they get a great experience of being a supporter?'
- Show them how fundraisers should use communications to deliver a rewarding relationship which puts donors in control and builds their trust, offering choice and control.
- Explain how they can give donors options of different channels of communication, different amounts of communication, different types of information or communication, and different timings.
- Understand how offering choices and managing preferences becomes a very valuable way of building donor satisfaction, trust and loyalty.

For donors, this project will:

- Stop them feeling out of control, and receiving communications they don't want. This will reduce feelings of annoyance, being put upon and taken for granted.
- Build trust by making communications more about what matters to them and less of what doesn't.
- Make it easy for them to contact a charity to express their preferences and feedback.

Why give donors choice and control?

Donors want more choice and control over what they receive, when, how much, and through what channel. Compelling evidence from wide-ranging research shows this makes donors feel more positively about your cause and more inclined to give (and stay). It will lead to greater trust, more goodwill and commitment, and greater respect for your charity.

However, fundraisers are also working in an environment where donors are increasingly concerned about data security, sharing of data, and over contact. Feeling out of control, and receiving communications they don't want, can lead to feelings of annoyance, being put upon and taken for granted, and can lead to loss of support.

A better place to start

Research reviewed for this project, and best practice reviewed, puts the onus instead on an open, listening relationship with donors where the charity is always working from a perspective of 'How can we find out what donors want, and use communications to better anticipate what donors would like to receive, and give them choices to meet their needs, so that they get a great experience of being a supporter?'

Where charities begin with the donors' perspective, and set out to use communications to deliver a rewarding relationship which puts donors in control and builds their trust, offering choice and control, is a key part of overcoming donors' concerns as outlined above.

What sort of choices can charities offer?

Charities can give donors options of different channels of communication, different amounts of communication, different types of information or communication, and different timings.

Donors can also be invited to choose between different types of engagement. They can be given choices about the way they support (for example different fundraising 'products', or whether to take part in an event, volunteer etc). They can be offered the chance to attend events. They can be invited to engage in a more personal way by, for example, sending a personal message, linking with a particular project or individual, or choosing to support an aspect of work that is close to their heart.

In all the examples we have seen, charities build trust when they start by thinking of it from the donor's perspective: what would make the experience of giving more fulfilling, interesting, enriching etc? How can I give donors more of what matters to them, and less of what they don't want?

Once you think of it from this perspective, offering choices and managing preferences becomes a very valuable way of building donor satisfaction, trust and loyalty.

Charities that do this well are those that think in terms of investing in the overall, lifetime value of a donor's support, rather than one year return on investment. It tends to come from a cultural perspective, and this is a shift that should be worked towards.

Everyone can take steps along the path to giving donors choice

Of course, different charities will have different levels of sophistication in terms of what they can offer, and what they fulfil. And the move to valuing donors at the heart of a charity is a longer-term shift that will take time.

But any charity can choose to adopt a series of principles:

- Explain to donors up front what supporting your charity will feel like from a communications perspective
- Be clear about how your charity treats its donors, and reassure them about what you do not do
- Set out to create supporter journeys that put your donors, and what they are interested in, first
- Give donors choices where you can.

Whatever choices you offer, you need to be able to fulfil, and commit to fulfilling. This may limit what you can offer donors right away, but you can work in stages: for example, receive what we usually send (and quantify this), or hear less frequently, or not hear from us in future at all.

Communications will be most welcome to your donors where they are experienced as relevant and interesting to them. Where you have good reason to get in touch when you do, and a clear need to share. When the type and quantity of contact is felt to be reasonable. And where they trust you not to mis-use their information. Any charity should set out to meet these standards.

So, giving donors choices and managing their preferences is an important part of good donor stewardship, but within the context of a relationship that sets out to value donors as partners and treat them well.

Offering choices and managing preferences at a tactical level (you should be able to do at least some of these things straight away)

- 1. Make it easy for people to contact you.** Invite them to do so (e.g. on the bottom of a letter or on a reply form), in a warm and friendly way that shows you really welcome their contact. Share a phone number, the name and ideally photo of someone they can speak to, and an email address too. Reassure them they can raise any questions or queries, and that you are ready to hear from them.
- 2. If you can, build an event to invite people closer to your cause,** so you can show them your work, bring them closer to the cause and how you make a difference, answer questions and listen to what they have to say.
- 3. Make opportunities to speak to your donors.** Finding out about them and their concerns, and listening to their views and concerns, gives you the best guidance on how to create communications that will be welcome.
- 4. Review all your donor recruitment literature/copy.** How can you set out for a new donor (e.g. on a donor acquisition communication) what the relationship will feel like, and what sort of choices/control you can offer them, to reassure them that they will have a say in what follows, and that you will take note of what they want? What can you promise donors about how you will treat them (and how you won't treat them)?
- 5. Shift the focus from 'we' to 'you',** but make it genuine, a shift of emphasis across every aspect of your communications – not a token language change.
- 6. Use of language is critical. Write in a friendly, personal way, to the real person** you are talking to. Be clear. Avoid jargon. Express it from their perspective (put them at the centre of the communication, not your charity and its needs.)
- 6. Review all the donor touchpoints across your charity.** To truly meet donors' preferences and choices, all staff should be trained to encourage open feedback, note specific feedback, choices and preferences, and make sure these are actioned. To ask the right questions, listen and make each donor feel listened to.
- 7. Devise a set of principles of how you can be donor-focused,** and offer people as many choices and preferences as you can. What can you do to get people across the organisation to buy into and live out these principles?

A final word

Charities enjoy a great privilege – the opportunity to bring people close to causes they really care about; and to help people to bring about change that really matters to them, but which they cannot do alone.

Done well, fundraising can touch donors deeply: it can enable people to reach inside and express heartfelt values which may be born through personal experience. For donors, supporting a cause can be rewarding, it can bring pleasure, and joy.

With this privilege comes responsibility – to honour this special bond, to respect people as individuals with their own lives and reasons for giving, and to make the experience of supporting the charity that works with the cause they care about a positive and even life-enhancing one.

The dangers of taking this goodwill that donors offer for granted have come home to roost: many donors express feelings of annoyance and irritation; of being asked too often and contacted too much, in ways and with communications they don't want; of being out of control, fed up, questioning why they give, and even withdrawing their support altogether.

Giving donors choices and managing their preferences puts donors back in control. It means donors can trust your charity, knowing the relationship will give them what they want, and not trespass on their goodwill. By acting on the findings of this project, your charity can work towards a place where listening, and offering different options and choices, can help shape the sort of relationship they experience. And donors can enjoy being donors.

It is just one part – but a very important part – of building long-lasting partnerships between donors and causes they care about that can offer great opportunities and real long-term value to both the donor and the charity.

14

The right people in place

Project 14. Getting the right people as fundraisers

Helena Sharpstone and Caryn Skinner, March 2017
Reviewed by Kath Abrahams

The original brief

As in a small number of other professions, public comfort and confidence in fundraising depends upon donors having contact with people who have specific qualities and characteristics. For fundraising what's needed are qualities that inspire empathy, trust, compassion and confidence. So recruiting and retaining the right people are essential to fundraising success. This project will consider the attributes that donors expect to see in the fundraisers they deal with and how recruiting specifically with those attributes in mind will significantly improve the donor experience.

For donors, this project will:

- Explain the benefits of investing in staff retention and having inspiring induction programmes that emphasise the importance of the donor experience.
- Help them understand the attributes that make a great, donor-focused fundraiser. Additionally, they will also learn the attributes required to be successful in the main fundraising disciplines.
- Introduce them to a range of ideas of how the recruitment process can be improved to increase the quality of fundraisers working for their organisation.

For donors, this project will:

- Reassure them that fundraisers are well trained and care about the experience the donor has.
- Increase the competence and donor focus that fundraisers will bring to their job.
- Reduce the chances of experiencing poor fundraising via untrained, unmotivated and unengaged fundraisers.

Summary of findings

At the heart of every fundraiser, regardless of the discipline, is a relationship builder. To be donor-focused is to communicate the urgency and importance of a cause and to provide the donor with a clear way to make an impact based on their abilities, skills and resources. But how do we attract these donor-focused fundraisers? Where do we find them? What recruitment processes help or hinder us? And when we have these donors, how do we keep them?

Our report will provide you with thoughts about the key attributes of such fundraisers in general and about fundraising techniques. We outline tweaks and changes to your recruitment and selection processes, as well as highlighting what keeps these fundraisers developing, growing and staying with you.

We have used our experience and professional background, together with examples from across the sector. We have also been talking to people – fundraisers, managers of fundraisers and directors of fundraising – to obtain their views and experiences too.

How to use the findings

We recommend you use the information to have a bit of a spring clean. What is your mind-set when looking for fundraisers? Are you describing the job in a way that attracts the people you want? Do you have a highly robust person spec that really gets to the heart of what you are looking for so you can test it out in a competence-based interview? How good are your interviewing skills and those of others around you?

Use this report to review all these processes and your behaviours and skills related to attracting, recruiting and retaining donor-focused fundraisers. Have a chat to your HR/Recruitment colleagues and refresh your strategy for recruitment. With your managers, discuss ways of creating a high-performance environment in which your fundraisers can thrive using the information we have consolidated. Have a look at your induction programmes and on-going learning and development plans: Are they supporting your fundraisers to become donor-focused, and are you rewarding that behaviour through feedback and tangible recognition?

Our findings are not exhaustive and are more pointers and prompts than a blueprint; however, we believe they will help you to stand back and take a good look at the how and the what of recruiting and retaining donor-focused fundraisers.

Broad scope

To define the personal qualities, characteristics, skills, attitudes and behaviours of high-performing donor-focused fundraisers so they may be found, attracted, recruited and retained.

Key objectives

- To define what a high-performing donor-focused fundraiser looks like and sounds like, and how s/he behaves.
- To identify patterns in the personal style of a high-performing donor-focused fundraiser.
- To establish whether different skills and behaviours are needed in different FR disciplines.
- To identify the climate in which high-performing donor-focused fundraisers can thrive.
- To outline top-line guidance regarding how to find people, recruit them, train those already in the position as well as newbies, and ways of retaining all of them to establish consistency and results.

Top ten attributes of donor-focused fundraisers

These are ranked by how frequently the attribute was mentioned in all our feedback. A donor-focused fundraiser:

1. Has excellent people skills, able to establish and build relationships with donors.
2. Connects to the cause, communicating its urgency and importance in a captivating and compelling way.
3. Adapts his/her style and approach to the person and situation.
4. Listens and respond to donor needs.
5. Is genuine and authentic, demonstrating integrity at all times.
6. Thinks quickly.
7. Has drive and resilience.
8. Organises his/her time and resources.
9. Builds his/her technical skills and keeps updated.
10. Is numerate.

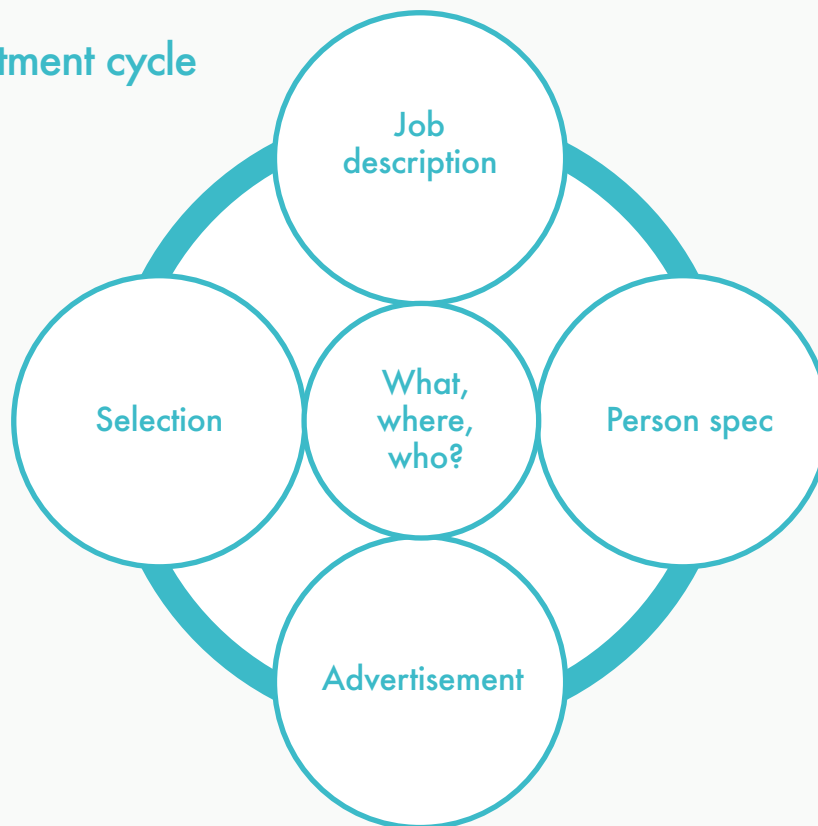
These skills are a combination of people and process skills, most of which can be learned and developed - this is important when it comes to recruitment.

Top ten attributes of donor-focused fundraisers

<p>Individual Giving</p> <ul style="list-style-type: none"> • Creative problem solver • Adaptable • Collaborative 	<p>Community</p> <ul style="list-style-type: none"> • Connection with people as individuals • Passion • Multi-tasker
<p>DM</p> <ul style="list-style-type: none"> • Awareness of statistics • Understands donor groups • Knows how to direct a message 	<p>Major Donors</p> <ul style="list-style-type: none"> • Rapport-building skills • Establishing common ground • Speaks the donor's language
<p>Corporate</p> <ul style="list-style-type: none"> • Tenacity • Energy • Rapport-building skills 	<p>Trusts and Foundations</p> <ul style="list-style-type: none"> • Writing skills • Can interpret scientific reports • Attention to detail
<p>Events</p> <ul style="list-style-type: none"> • Resilience • Networking skills • Team workers 	<p>Digital</p> <ul style="list-style-type: none"> • Understanding of digital audience and channels • Marketing capability • Financial literacy
<p>Legacies</p> <ul style="list-style-type: none"> • Ability to handle sensitive issues skilfully • Calm • Compassion 	<p>Supporter Care/Admin</p> <ul style="list-style-type: none"> • Loves supporters • Is an advocate for them • Can be in their heads

Full lists can be found in Appendix one

The recruitment cycle



Your recruitment and selection checklist

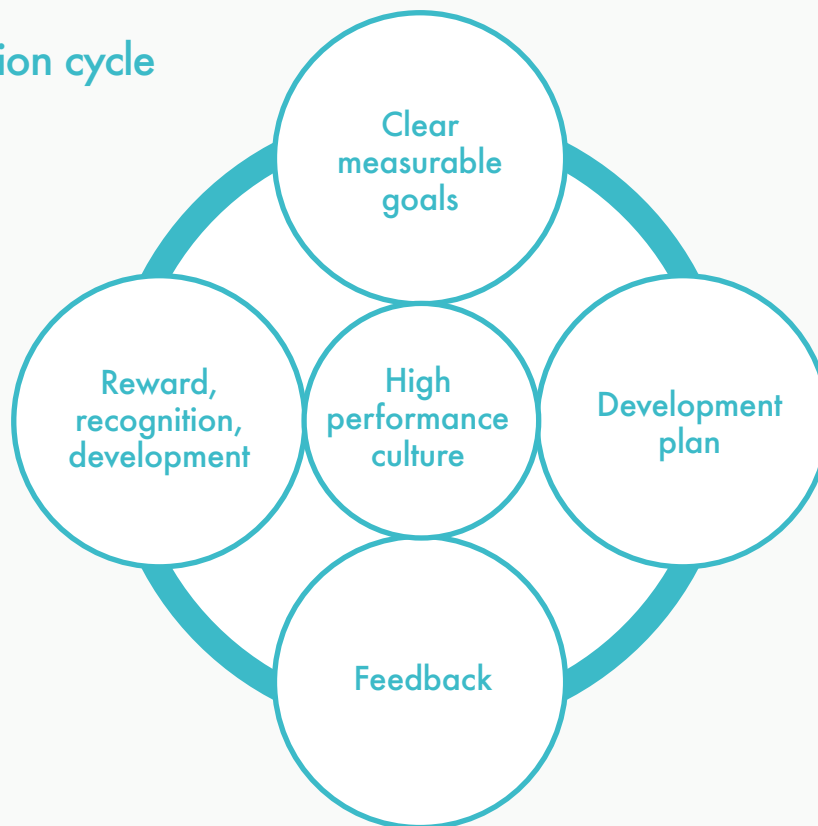
Immediate implementation - recruitment

1. Review your fundraising job descriptions – are they designed around donor-focussed fundraising? Do the main duties describe relationship building or processes maintenance?
2. Review your fundraising person specs - do they include the top ten attributes of donor-centred fundraisers, and have you included specific attributes of the fundraising discipline you are recruiting?
3. Review your advertising – are you including attributes as well as specialist skills?
4. Consider widening the market places at which you are looking – many great fundraisers may not be working in fundraising. They could come from a variety of backgrounds that have enabled them to develop the key attributes.
5. Design competency-based questions for the interview to test the attributes.

Longer term – Recruitment

1. Strengthen your networks across the sector, speak at conferences, join a special interest group, and engage with social media to increase awareness of your charity as a great place for donor-centred fundraisers to work.
2. Have jobs advertised on your organisation's website – fundraisers often seek out the type of organisation they want to work for rather than just any fundraising job.
3. Consider the use of agencies – they have people looking for jobs on their books. If you rely solely on agencies, you are missing out on people who are not actively looking but who may be attracted to you by seeing an advert.

The retention cycle



Your retention checklist

Immediate implementation – retention

1. Sign up to an annual salary survey to check you are paying the market rate for your fundraising jobs.
2. Make sure your induction programme helps your fundraisers to orientate themselves to their role and confirm the donor-focused attitude you want.
3. Talk about the donor as well as the beneficiary.
4. Agree on clear and explicit objectives linked to the fundraising and organisational strategy.
5. Establish regular one-to-one and team meetings to create a two-way communication channel to keep you and your fundraiser on track and involved.

Longer term – retention

1. Include donor-centred behaviour in your objective setting – then you can reward it.
2. Establish development programmes for your fundraisers – personal and professional. Consider the opportunities to accomplish this development plan on the job and from working with other people, as well as formal classroom-based learning.
3. Open doors to other parts of your organisation – get your fundraisers out and about, talking to people close to the cause to increase understanding and commitment.
4. Be flexible in your style as a manager – move with your fundraisers – what do they need from me now to develop and become enabled?

Longer term – retention (*continued*)

5. Consider cross-functional moves – events fundraisers have a lot in common with community fundraisers, corporate fundraisers and major donor fundraisers share similar skills – can you second people to gain wider experience?
6. Build strong, cohesive teams that are focussed, committed, accountable and enjoy healthy debate to create the best donor-centred relationships.
7. Create a trust culture, not a blame culture, to allow mistakes to be learned from and to allow taking risks.
8. Build your relationships around the organisation to educate everyone about fundraising – get fundraising valued alongside other functions.
9. Develop great fundraisers for the sector, and take pride in that - you cannot hold onto them forever, as they need to grow and progress.

15

How senior leaders can bring about change for your donors

Project 15. The role of Trustee boards and senior managers

Harpreet Kondel, Roger Lawson,
Colin Kemp, April 2017

The original brief

As in a small number of other professions, public comfort and confidence in fundraising depends upon donors. Fundraising's evolving future will inevitably have profound implications for volunteer boards and senior management teams. This project will help them to understand the changes in their roles and to prepare for, contribute to and respond to fundraising's new agenda.

For senior management and Trustee boards, this project will::

- Highlight their role in improving, and taking ownership of, the donor experience.
- Show why they need to take a key role in creating the right culture for donor-focused fundraising to flourish.
- Ensure that fundraising is seen as an organisation wide responsibility.
- Encourage them to take an active role in front line fundraising activities, such as attending events, thanking donors and listening to calls with donors.

For donors, this project will:

- Build trust by showing that the entire organisation cares about their contribution.
- Reassure donors that senior management and Trustees are serious about improving their experience of giving.

Summary guidance

What should the role of a Trustee entail?

Trustees play a vital role in leading charities, as they often give up their time freely to volunteer for the myriad of good causes in the UK. Good Trustees are vital to the success of any charity. They provide governance, accountability and oversee the way in which the charity is led. They help to keep everyone focussed on delivering the charity's mission. In addition, they support the CEO and SMTs by determining the strategy and direction of travel for the organisation by acting as a 'critical friend' and, when necessary, providing constructive challenges.

Today's boards must be informed and engaged, both in order to fulfil their legal obligations and to leverage their time and talent to advise management. The governing body of a not-for-profit organisation must enable the charity to carry out its purpose, and to make sure that they are delivering the best possible benefit to the people that the charity is set up to help, in addition to recognising those who enable the delivery of the mission through their donations – the donors.

However, what is evident is that the understanding of what a Trustee role entails is variable. Too often, boards lack a diversity of skills, experience and people. It is also very apparent that too many Trustees have little understanding of what fundraising is, and the significant role that donors play. If organisations are to flourish, this mind-set must change. It is clear is that charities that implement successful fundraising models do so when organisational values are evident throughout their fundraising, and when their fundraising offers are audience-led and are of benefit to both donors and beneficiaries.

What should the role of senior management entail?

Complex organisations require strong, knowledgeable executive leadership to get everyone pulling in the same direction. Senior managers should be focused on the implementation, management and reporting of organisational performance in relation to the strategy. They are required to make difficult choices about what can and cannot be funded; therefore, it should be the role of the CEO and senior managers to lead and champion fundraising. In too many charities, in which a large proportion of income comes from statutory sources, too little focus is on fundraising. Too often, and in all charities, it falls off the agenda and, whilst the financial figures may be reviewed regularly, very little time is spent on understanding 'how' an organisation fundraises and the pivotal part that donors play in this. When fundraising is given its rightful prominence as an activity, it is too often at the expense of the donors who give.

CEO and SMTs must educate Trustees about fundraising, what it entails and why it is necessary. SMTs should provide the board well-documented analyses and recommendations to help the board strike the right balance when mission and financial realities come into conflict. SMTs should also ensure that Trustees are provided with information about the donor experience by sharing examples of both excellent and poor practice from within their organisations. Both Trustees and SMTs should commit to 'owning' the donor experience and ensure that it is a rewarding relationship, both for the donor and their organisation.

Governance and Fundraising

It is essential that the roles of governance and management are clearly understood and kept distinct. The media criticism in recent months has pointed to a lack of ownership and governance of fundraising strategies at board level.

With regard to fundraising, Trustees play a very specific role; they must ensure that the organisation's financial planning is conducted in a robust manner. Without fundraising income, many charities would lose their independence and would simply become the nodding dog of the government. Once CEOs, SMTs and Trustees understand fundraising better, they should be better placed to change the focus from the short-term, in-year planning, to a long-term focus that looks three to five years ahead. This, in turn, will reduce the emphasis and pressure on short-term income numbers and lead to a closer examination of the positive long-term impact of enhancing the donor experience. Trustees must have a greater understanding of how fundraising works and, in doing so, become ambassadors for fundraising. Trustees can and should mentor fundraising teams and support them with plans to invest and deliver future income growth, thus enabling the charity to deliver on its mission. As donors themselves, Trustees should champion a donor-centred fundraising approach for their organisation. The remit of the board must ensure that all fundraising is monitored to ensure that it is carried out in line with organisational values.

Principles of creating a donor-focused Trustee board and senior management

Below are some of the key principles and action to create an effective donor-focused organisation.

Your organisation should be able to act on some of these straight away:

Principle 1

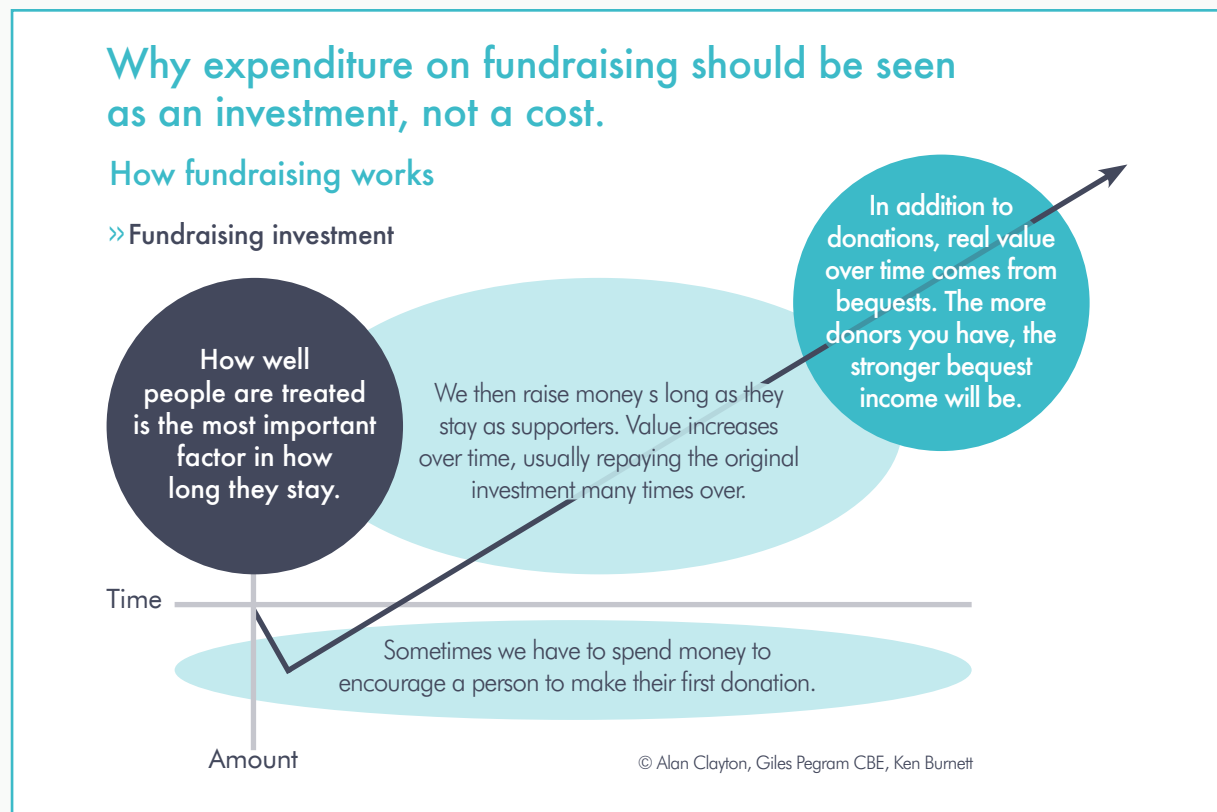
CEOs and boards play a key role in creating a culture within their charity whereby the donor experience, its importance, its measurement and its contribution to the long-term financial health of the charity is paramount. Actions for Trustees and CEOs:

Action for Trustees and CEOs:

- CEOs should work with their Trustee chairs to embed this thinking into boards, and their measurement and working. CEOs should build a board with a diversity of fundraising skills, experience and people. This will require organisations to undertake a skills audit to identify any gaps. Having a Trustee on the board who are specifically focused on fundraising is enormously helpful, particularly when this Trustee is also a donor.
- Chairs and CEOs should recruit Trustees who are engaged and committed to the cause. Specifically, when recruiting Trustees, consideration should be given to their skills, attitudes, motivations and mind-sets, particularly with a view to their ability to inspire and delight donors.
- All Trustees and CEOs must visit the project work in order to tell the story of their organisation, as well as to understand the difference that fundraising makes in delivering the mission. Ideally, they should be able to deliver the fundraising 'elevator pitch'. They should also offer their skills, expertise and contacts to guide fundraising approaches towards new sources of income. They should spread the word about their charity's work and, ideally, even take part in some fundraising activities.
- Boards should set aside time to develop the skills needed for fundraising governance. The Chair or Board Development committee should consider induction processes for new members, ensuring that the fundraising environment and the internal fundraising context is understood. They should be encouraged to meet donors and to understand the impact that they have. Trustees should believe passionately in their cause and understand how their roles can advance their cause, and that the role entails both responsibility and benefit. They should see it as their role to inspire staff and colleagues about their cause.

Specifically, every Trustee induction should deliver the following understanding:

1. That fundraising is about building long-term, committed relationships, not short-term donations.
2. How fundraising investment works (See CDE project 20 *Fundraising investment*).



3. Legal and compliance requirements, and how these must be met.
4. The specific fundraising nuances of their charity; for example, what they have in terms of policies, a donor compact and so on (see *The 6Ps Promise to donors*). The Commission believes that all fundraisers will be able to make a detailed, inspirational compact with their donors and adhere to it in future. This will enable donors to understand and appreciate their role in supporting the causes that matter to them, what they can expect from the causes they support, and that the solutions they provide together will be entirely consistent with what donors believe in and want.

Principle 1

The myth that fundraising is simply an activity that is done to people must be dispelled, as it is about inspiring donors and providing them with a great experience. Responsibility for this must lie jointly with the Fundraising Director and the CEO.

Actions for Trustees:

- To ensure that Trustees comprehend how fundraising works, they must be trained to understand how fundraising takes place, they must shift the focus from having little involvement with fundraising to ensuring that the fundraising strategy is set and approved in accordance with the organisational strategy to ensure that the two are aligned. Trustees should have a clear vision of what it should be like to be a donor and what the donor experience should be.
- Ensure that your fundraising programme reflects your organisational values. All fundraising must begin and end with the donors' perspective. Values are a key building block as, when charity values align with potential donors' values, there is a natural fit. Well-articulated values can inform fundraising practice and messaging. Fundraising is all too often seen as a set of activities that are carried out to generate funds. However, good fundraising is about building long-term, inspiring relationships with donors by understanding donors' motivations, listening to, and meeting their needs and their aspirations. The focus must shift from short-term targets to building long-term, rewarding relationships that offer alternative ways to support and engage other than via financial means. It is vital that fundraising is sufficiently well-resourced (in terms of staffing, volunteers, budgets and so on) to deliver this.

Actions for senior management:

- Fundraising Directors need to work with their CEO, SMTs and with staff across the charity to create a donor-experience focused strategy. Fundraising Directors should be positioned as leaders of this process and should be involved in early meetings with Trustee chairs. Trustees then must hold the CEO and SMTs to account in terms of delivering this strategy.
- There must be sufficient monitoring of fundraising activity to ensure compliance with the law, as well as risk management, be this reputational or fiscal. It would be sensible to undertake an immediate review of CC20 and key Codes of Fundraising Practice to identify any gaps in your policy and protocols for fundraising. For example, do you have a statement of values, a policy for raising money from vulnerable people (see CDE project 02 *Fundraising and vulnerability*) a fundraising framework, a current strategy backed up by appropriate resources, a reporting and monitoring framework and a scheme of delegation? This should include ensuring that the charity meets all legal requirements and makes its own decisions about best practice, as well as about acceptable and unacceptable behaviours.

Specifically, the board should set a vision regarding the way in which the charity should treat donors – in effect, the principles of fundraising. This would include:

- Defining the desired donor experience;
- Setting up a Donor Promise, or 'inspirational compact' (see The 6Ps *Promise to donors*)
- Having a policy on fundraising from vulnerable people; (see CDE project 02 *Fundraising and vulnerability*)
- Having a policy for working with suppliers; (see CDE project 21 *Working with suppliers*)
- Legal requirements and compliance – and going above and beyond these.

Principle 3

There should be a change in the culture of the charity to one that is focused on the donor experience; this must be led by Trustees.

Actions for Trustees and CEOs:

- Understand that, as fundraising is central to the organisation and its mission, fundraising must be an organisational priority; the entire organisation should be aware that it is everyone's job to fundraise. Fundraising, specifically the donor experience and supporter care, must feature on the agenda at board and relevant sub-committee meetings on a regular basis. You can do this by having the 'donor experience' as a standing agenda item. Each meeting could be opened by sharing a beneficiary and donor story, which will ensure that the mission and the impact of fundraising remain in focus. Every board member must discuss and agree on the fundraising strategy (which includes the 'donor experience'). At an agreed frequency, it might be helpful to hear from fundraising and supporter care staff. Introduce an annual report that focuses on the donor experience, to be delivered to the board by Fundraising Directors. Please see Appendix 1 for two great examples of charities that are already doing this.
- Whether you are a Trustee or a CEO, you should lead by example, be interested in and support your fundraisers. Ensure donors know that fundraising is important to your charity. All Trustees and SMT members should be encouraged to get to know Fundraisers and support them. Ensure that all staff never forget the donors' power to 'switch off'.
- Meet donors at receptions, events, meetings of local groups, focus groups of donors, by attending the London Marathon, meeting Trustees of the most significant trusts and the key top people of corporate supporters, for example.
- CEOs and Trustees should allocate a significant proportion of their time to donors. They should be 'sheep-dipped' by Fundraising Directors into the world of donors. They should see a major part of their role being to inspire donors, explain their thinking, and connect donors to the cause. They should, for example, meet the CEOs of the top corporate partners, meet key Trustees of trust and foundation supporters, have sandwich lunches with small groups of the most significant donors and attend meetings of local fundraising groups.
- CEOs should consider whether every donor, above a certain level, should receive a letter signed personally from them; above a higher level donors might receive a phone call. (This is not fanciful. It is rooted in actual practice.) This will enable the CEO to nurture donors and to provide them with a great donor experience.

It will also keep CEOs in touch with donors daily and enable them address any feedback.

Principle 4

Putting the donor at the heart of the charity is the responsibility of all members of the SMT and their staff, not just the Fundraising Director and Fundraisers.

Actions for Trustees:

- Review planning processes: Is your organisational strategy strong enough for your fundraising strategy to flow straight from your cause, programmes and ambitions? Are you clearly able to go beyond 'raise more' to 'raise more because...', rooting your fundraising in your cause and the needs of your beneficiaries in ways that will inspire your donors?

Actions for senior management:

- Consider your planning process and whether it is fit for fundraising purposes in the new environment. If you are still largely focused on a plan based on the financial year, consider changing to a rolling three-year plan along with a robust policy for the use of reserves (see CDE project 20 *Fundraising investment*) that gives fundraising teams the time to build longer-term relationships with donors. The Fundraising Director must engage with the Finance Director and explain long-term planning and the impact short-termism has on the ability to grow income and the charity's long-term financial health. Since the Finance Director will be rooted in facts and figures, discuss the new measures you are using for measuring the donor experience (see below).
- The Fundraising Director must collaborate with the Services Director. Their work is dependent on donor income. Service staff job descriptions should include engaging with, explaining to and inspiring donors in order to deliver the best experience to them. Their salaries are paid by donors.
- Fundraising Directors must be held accountable for delivering the best experience for donors by the SMT. When building and approving fundraising strategy and reporting on it, consider 'what does success look like?' The financials are, of course, important. But what are the non-financial success indicators your board is seeking? The measures need to be appropriate to your charity, but may include donor satisfaction, loyalty, complaint handling, brand metrics, use of a supporter panel or mystery shopping. See CDE project 03 *Satisfaction and commitment*. Develop these with your fundraising leadership team and supporter relations function. Fundraising is about relationships, not just the ask.
- The Fundraising Director should not be the only member of SMT who is thinking about donors. Since donors are the lifeblood of the charity, their experience should be considered by the entire SMT and Trustees. Trustees and the SMT should spend time meeting frontline fundraisers and fundraising operational staff in order to understand how different methods of fundraising operate and the skills required to do the job. It is important that everyone recognises that it is only because of the donor that they can meet organisational objectives.

Specifically, they should endeavour to:

1. Go out and take part in fundraising on the front line; for example, attending events, street collections and so on.
2. Spend time thanking donors; for example, take part in a thankathon, or telephone a few (not necessarily major) donors in the early evening to discuss the impact of their gifts.
3. Spend half a day in 'supporter services', reading incoming mail, looking at appeal responses and listening to inbound telephone calls.
4. CEOs should be the place of last resort for all complaints about fundraising. Any donor, if dissatisfied with the response via the usual channels, should be able to be escalated to the CEO. This will help to change the culture of an organisation, as it shows that the CEO is personally willing to address complaints.

5. Develop a donor promise, an inspirational compact, which enshrines your charity values: See the 6Ps.
6. Explain to donors from the beginning what supporting your charity will feel like from a communications perspective. Be clear about how your charity treats its donors, and reassure them about what you do not do. See CDE project *20 Fundraising*.
7. Set out to create engaging donor journeys focused on what your donors are interested in and offer them choices wherever you can.

Principle 5

Fundraising Directors must change the culture, training and focus of their staff.

Actions for senior management:

- Create a donor-focussed plan, in consultation with your fundraising management team, and have it approved by the SMT.
- Consider the relevant summaries in the Commission's report.
- Use job specifications to focus on the right motivation, skills, attitude and mind-set of your staff. Provide robust knowledge and training programmes that include an induction to the cause, donors and fundraising.
- Make creating a great donor experience real, and reward those staff who do it well.
- Appraise staff based on the non-financial measures you set.

Conclusion

In conclusion, if fundraising is going to continue to thrive, UK charities must reframe their thinking to become truly donor-centred.

For too long, we have talked about 'putting the donor at the heart of the organisation' but, everyday internal pressures have made this difficult. Fundraisers face challenges pertaining to focus on short-term income targets, poor understanding of budgeting/investment and the need to look beyond year 1, lack of internal resources, insufficient donor care programmes, poor data management systems, lack of service information to prove the difference your cause makes, and unsupportive fundraising cultures, amongst others. If a donor-centred approach is to succeed, it must come from the top down and be disseminated throughout the entire culture of your organisation. Merely providing lip service will no longer be enough; neither will it be sufficient to assume that 'fundraising' is the sole domain of fundraisers and need not concern anyone else in your organisation. You will need to recruit and retain the best fundraisers and support them to be effective in their roles. Success requires a team effort that champions the impact of donors and their financial support in every part of your organisation!

Going forward, those organisations that have Trustees and senior managers who advocate donor-centred fundraising will prosper and, in doing so, they will provide donor experiences that go above and beyond donors' expectations.

16

**The donor's experience is a direct result of
your culture and how much you respect them**

Project 16. Creating a distinctive service culture

Richard Turner, Joe Sutton, April 2017

Reviewed by: Joe Jenkins

The original brief

Notoriously, charities have consistently underinvested in even basic customer service, both people and systems, which undoubtedly affects the donor experience, particularly retention. This project will define the components of optimum levels and standards of donor service to ensure consistent quality experiences with the aim of defining a distinctive service standard to which all charities can aspire.

For senior management and trustee boards, this project will::

- Show why customer service and donor care should be seen as a driver of income and not a cost centre.
- Explain the benefits of setting a customer service vision based on what you want your supporters to feel.
- Show why it pays to encourage complaints and feedback from supporters.
- Help the charity's leadership to be focussed on providing great customer service across the organisation.

For donors, this project will:

- Increase opportunities for donors to provide feedback and to experience great service when they contact an organisation.
- Set clear expectations of what will happen when they give and that charities' will deliver against the promises they make.
- Reassure donors that, if they make a complaint, it will be dealt with in a sensitive and timely manner.

Intro – What’s inside?

How does the Camphill Village trust get an over 60% response rate from their Christmas appeal? What is the critical question that Cancer Research UK asks its supporters before developing any fundraising project? What is the culture within Haven’s Hospice that led to a £3 million legacy? Read on to learn how organisations create a culture that provides exceptional supporter service, leading to a better supporter experience.

The approach?

A request for people to participate in this project was made through those who signed up to the Commission on the Donor Experience website and through the LinkedIn Supporter Care forum. Interviews with those who contributed to this paper were conducted throughout 2016.

1. Summary guidance

Why bother?

The customer's experience now matters more than at any other time. Why? Anyone can share their experience – both good and bad. Think about Amazon reviews or Trip Advisor, or simply sharing your experience on Twitter or Facebook. If this applies to the commercial world and their customers, then why not for charities and their supporters?

A customer's experience can now impact on an organisation's reputation. Your reputation after all is what other people say about you.

It goes further. Increasingly in a world with an abundance of information, we value the opinions of sources we trust to help filter information out and help us make choices. These could be friends or colleagues, or simply other customers or of course, donors.

Again, reputation really matters.

How can charities deliver a great 'customer experience' and a responsive 'customer service' such that it helps build their reputation, results in inbound leads from referrals, and encourages 'customers' to return? Customer service is now totally strategic as part of raising funds on a sustainable basis. This is not about satisfying the donor and meeting their expectations. This is about wowing donors plus going beyond them and dealing with those times someone is dissatisfied in a way that does not damage your reputation.

A note on language

Should we use the term customers, donors or supporters? With many causes, donors can also be beneficiaries. 'Customer service' cannot be seen in isolation, i.e., just focusing on donors, so we have adopted the term 'supporters' to cover anyone who has an interest in your cause/services – including donors, prospects, campaigners and beneficiaries.

Your charity may have a single individual who deals with supporter care, an entire team or a department. It may just be a shared responsibility amongst the few staff you have. The principles outlined here can apply in all of these situations. We have assumed that you have a Supporter Care or equivalent team but appreciate this will not always be the case. When we use the term 'team' we mean everyone who has a direct part to play in providing the service to your supporters. See CDE project 01 *The use and misuse of language*.

The challenge we are addressing

Creating a culture that delivers a great experience or service for supporters means creating a culture that delivers a great experience for anyone who contacts you – even if it is a complaint. Think of a time you made a complaint to a shop that was dealt with so well you felt even better about them!

As this is now of strategic importance—because of the impact it can have both on your reputation, retention of donors, and even attracting new ones—it needs to be front line and a priority. Supporter care is often parked to a role or a team. Its function is often very efficient, such as processing donations, but often not influential. And yet it can play a critical role in feeding back to the organisation what supporters are thinking and feeling. Perhaps if charities had effective ways of listening to donors they might recently have picked up on some donor concerns more quickly? Delivering a great supporter experience must not be seen in isolation—it now needs to be something the entire organisation is aware of, values and takes responsibility for, alongside a team or role assigned the title, ‘supporter care’. Hence it needs to be part of your organisation’s culture.

The challenge is how to create a culture throughout the organisation that results in an outstanding level of ‘customer service’. This of course includes responding to donations – but also extends to requests or enquiries that are not straightforward, and any interaction with potential supporters.

1.1 Principles

These are the key principles that we recommend if you want to create a culture of exceptional service that helps to deliver a great supporter experience.

Principles:

1. Customer service and care **now really matter** – anyone in your organisation who could interact with a supporter (just about everyone) needs to understand this. So, you need a vision to work towards and ways of reminding staff about its importance.
2. You need to be **constantly learning** – and that means listening to your supporters, encouraging and responding to feedback that will help you improve and ensure that your vision matches their needs.
3. Your responsiveness and how you make people feel from the experience you provide **needs to impress** ‘the customer’, not just satisfy them. The way to achieve this is step by step.

Look after your supporters and they will look after you

“A lady phoned about looking after sheep. We did not fob her off. We were tenacious in finding someone who could help although it was not an area of knowledge for us. She left us £1 million in her will.”

Phil Young, RSPB.

1.2 What can I do straight away?

These are the steps to start implementing right now.

1. Understand and explain WHY supporter service is now critical and strategic.

First it is key to get across why supporter service now matters to the leadership of the organisation: not just to mitigate bad press and to handle complaints, or even because it is the right thing to do (which of course it is) – but also for the strategic reasons outlined above.

Back in 2005, Sargent and Jay's report, *Redefining Commitment*, concluded that quality service leads to greater commitment from donors.

“To summarise – donors who share the beliefs of the charity and express higher levels of satisfaction with the quality of service provided to them are significantly more likely to express higher levels of active commitment. Similarly, the factors multiple engagements, trust, learning and personal link all have a role to play in fostering active commitment.”

Redefining Commitment, Sargent and Jay, 2005

2. Create your vision and turn it into action.

Identify all the key roles that are critical to delivering a service culture and work with them to create a vision. This includes any staff that answer the phone, your supporter care team, those that deal with inbound digital communications, and those involved in outbound communications. Create your vision of what you want your supporters to feel because of the service culture you provide. Then start to unpack what that means in terms of everyday actions. As a starting point you could use the service standard we have provided in the Appendix.

a. Set yourself targets that will help to achieve the vision.

Set the targets you need work to that will deliver the level of excellence you aspire to in your vision. What are the important metrics that you want to fulfil? Do you want to send thank you letters within one day or three days? How quickly will you answer a complaint? How quickly will you answer a query not directly related to your work? Again, over time you can ask supporters what they want and capture feedback as you go. Discuss whether it is better to send a quick reply or take a bit of time and make it more personal. Create wow...but not within expectations. You now need to go beyond them!

b. Create a set of values and display them proudly.

Agree with your team on a set of values that you can live by. You can change them and refine as you go along, but your values start to make it quite clear what you should do and should never do. For example, Hope and Homes for Children have the values: excellence, integrity and courage displayed on every wall; UNICEF's Supporter Care team's values are choice, recognition and voice.

c. Link your vision, targets and values to actions.

Visions, values and targets you have set are meaningless unless you determine what they mean in terms of actions you commit to do. Translate those values into actions and check back against your vision. For example, if 'choice' is a value what does that mean for what you offer supporters?

3. Share your 'bright spots'.

What examples do you already have of superb supporter care or service? Ensure you capture and share them in a regular email circular, staff meetings and inductions. Consider keeping a library of great moments and use these to define those elements of excellence.

4. Think like a supporter.

Today, you can start to ask, "What would this look like to a supporter?" and put your answer into practice. Better still, have a particular supporter in mind. Consider giving him or her a name and get staff to ask, "What would xxxx think?". For example, this could help you determine whether you are sending out too many emails, or even whether you are communicating enough to supporters.

An effective way to do this is to introduce simple every day memorable reminders of your supporters. Crisis simply imagine that a supporter is in the room for everything they do.

5. Proactively seek regular feedback from supporters.

It is critical to ensure that you have a constant feedback loop so your level of service is constantly improved. Determine all the ways you can constantly encourage feedback from supporters where possible. Invite supporters to communicate on what they thought of your last mailing or email. Better still ask them WHY they donated to you at the time they give? Ask them if they are happy with the communications they receive. Use this feedback to inform how you behave and what you change; share the feedback with your supporters, together with how you have responded, to show that you have listened.

6. View complaints as another opportunity to impress.

Logically, if a customer has no reason to complain, their loyalty might increase. Conversely, if they have one or more reasons to complain, we might assume that their loyalty might decrease. However, a wide body of evidence shows that where a customer has complained and received a proper response, they will become more loyal than if the problem had never arisen.

7. Deliver wow thank yous.

A thank you is the one communication you can almost be certain will be read. So, it is worth putting in some effort to help make it something memorable that supporters enjoy receiving. For more guidance, please refer to CDE project 4 - *Thank you and welcome*, compiled by John Grain.

8. Read about what works.

The following books are simple but inspiring short reads recommended by fundraisers who have contributed to this project. Order the books and circulate them around the team.

How to Wow: *68 Effortless Ways to Make Every Customer Experience Amazing* by Adrian Swinscoe. An informative book full of bite-size case studies and tips about how you can transform what you do.

FISH A short story about the Seattle Pike's Place fish market, and their customer-focused service culture. There are four key principles: Choose your Attitude, Be Present, Make Someone's Day, Have Fun.

"Your customers are only satisfied because their expectations are so low and because no one else is doing better. Just having satisfied customers isn't good enough anymore. If you really want a booming business, you have to create Raving Fans".
Raving Fans by Sheldon Bowles.

1.3 What can I do in the future?

These actions take a little longer and/or need to be done over a period of time

1. Invest in resources and people.

Most charities have not traditionally invested sufficiently in customer (i.e., donor) care. This culture has to change. For this to happen, charities have to recognise that supporter care is an investment that repays handsomely in donor satisfaction, retention and future giving. Consider investing more resources, expertise and experience in your team that deals with inbound supporter communications and care of supporters, due to its strategic importance. This may mean reviewing salaries, and determining what can you put in place that does not just achieve the minimum but goes beyond expectations when someone contacts you. Good customer care staff should be highly valued and rewarded as much as any other fundraising staff.

2. Make your 'donor promise' public.

Write a supporter or donor promise—a statement of your pledge to supporters that will hold you to account. The very process of writing it will help you think about the issues. Publish it. It could even be a blog or a communication you send out to supporters (that will ensure you make it plain speaking). Here are some elements that you should consider:

- Be ambitious. Although your supporter charter may state your commitment to following the law and accepted practice guidelines such as data protection it should go way beyond this.
- Demonstrate HOW you are doing what you promise. For example, provide a web link to the part of your site that demonstrates the impact the charity is having.
- Be accessible, for example, consider providing the names of your team members responsible for inbound communications with a photo and details of how to contact them.
- Encourage donors to let you know if something has gone wrong. Give instructions on how to make a complaint.

3. Enable everyone to inspire your supporters.

When you interact with supporters, it is an opportunity to talk about your mission. Are staff able to inspire people with the conversations they have? Are they able to tell a story? Ensure that all staff can do this, whether it is through exposure to your projects or engagement with staff responsible for service delivery. For example, encourage staff to visit and immerse themselves in projects to obtain their own stories they can tell personally. Consider providing story telling training to staff. For some examples of how charities approach this, [see the top tips](#) in the next section.

4. Share and encourage good practice.

Create opportunities for staff to showcase the level of supporter service they are providing and give them recognition. This could be a simple weekly email shared around the organisation that includes anecdotes of good practice, or inclusion of great supporter service in annual awards or any end of year reflections. Make supporter service a part of annual appraisals – ask for examples where someone has helped to provide exceptional service for a supporter.

5. Get input from your supporters.

List all the ways that you can involve supporters and actively listen to them throughout the course of a year. Create structures for speaking to supporters, for example, putting aside a whole day for everyone in the organisation to contact supporters and thank them. Find supporters or board members who will come in and volunteer in your team. Consider involving supporters in your editorial committee for your newsletter or your next appeal by contributing some content. Run annual focus groups so you can have a conversation about your fundraising. Or simply hold a supporter day, a chance they can meet other supporters as well as you.

6. Work out your indicators and measure/capture them.

Determine the indicators that will show you are delivering the level of supporter service you aspire to. This will not just be response times to donations, enquiries, and complaints – although response times will be one factor. Consider introducing a way for supporters to rate their experience of interacting with you (as seen on Amazon, or Trip Advisor reviews). Track positive feedback and complaints and benchmark this against previous years and against the amount of activity you do.

Consider measures such as Net Promoter Score as a basis for measuring your level of service. Net Promoter Score asks supporters to rate you on a scale of 1-10 by asking one question:

“On a score of 0-10 would you recommend our charity to a friend or colleague?”

For a case example of a charity using the Net Promoter Score along with more suggestions for measures, see CDE Project 3: *Measuring satisfaction and loyalty: How do your donors feel?*

You will also find an [example of how UNICEF monitors complaints and uses this to alter behaviour along with top tips](#) in the next section of this document.

7. Go mystery shopping.

At the very minimum, put yourself in the shoes of a supporter and work through each step of making a donation, at each stage asking yourself how it made you feel. Better still, formalise it. Arrange for someone, or several people, ideally outside your organisation, to donate in a number of ways, by phone, online, and by post and get them to record how your organisation responded, what were the first and subsequent communications, and how they felt as a result of receiving them. You could ask friends or family, or even fundraising peers in other organisations in return for you doing the same back, for them.

There are even initiatives that run mystery shopping exercises and will compare your organisation against other similar organisations. You could also ask colleagues who give to other charities to track their responses and see how you compare.

8. Plan a supporter journey.

Planning a supporter or donor journey is an effective way to ensure that you have a conversation internally about how you treat your donors after they give.

Remember it is a planning process. People are unlikely to do what you want them to or what you think they will do—but the very act of having the conversation internally will help you prepare.

Fundraisers often think of the supporter journey as the sequence that turns someone from a cash giver to a regular giver and then to a legacy pledger, or it is the sequence of what you send when. It is really neither of these, although both could be outputs or the impact of developing a supporter/donor journey.

A far better way to think about the supporter journey is that it is the **story** you would like your donors to hear. Like all good stories there are different stages, from the opening ‘grabber’ that got their attention and made them first donate, the need for more help when things get difficult, to the final celebration.

For more information on thinking in this way and preparing an appropriate supporter journey see CDE Project 5 - *The supporter journey*, compiled by Morag Flemming



Three steps to leading a great donor experience

Project 17. Leadership

Rob Woods, February 2017
Reviewed by: Louise McCathie

The original brief

There's no doubt that high quality, inspirational leadership is the lynchpin in any organisation's approach to and expectations from fundraising. Yet it's an area that suffers from premature turnover and underinvestment as well as misunderstanding. Building on previous learning this project will define what makes great fundraising leaders and what leadership they need from their senior management colleagues and their board if they are to deliver the competent, motivating leadership that will sustain and direct the new style of fundraising that is evolving in Britain.

For senior management and trustee boards, this project will::

- Show how they can demonstrate leadership in being donor-focused and encourage their fundraisers to do the same.
- Promote the idea of connecting fundraisers and front line staff, so the organisation's purpose is embedded into fundraising.
- Help them to promote leadership at all levels of the organisation through trusting staff and empowering them to make donor-focused decisions.
- Show why investing in ongoing learning and development will help create an environment where great fundraising can flourish.

For donors, this project will:

- Increase the confidence of donors that the fundraising profession is well lead and ethical.
- Increase the opportunities for donors to be inspired by the purpose of the causes they support.

Summary

What kind of leadership increases the chances that a charity will operate in a donor-centred way?

This is the question we sought to answer in this project. Our primary means of answering the question was to interview 16 leaders who are considered by experienced fundraisers to be both effective leaders and to lead in ways that are donor-centric. We also drew on existing books, courses and reports on fundraising and leadership.

Anyone who cares about a particular problem or injustice in the world might want to help a charity that addresses that issue in more than one way, and yet many charities are led in a way that reduces the chances that supporters will be treated as complete human beings, rather than merely, for example, ‘major donors’ or ‘campaigners’. For charities to become smarter in the way they treat supporters, leaders of charities need to act differently.

Additionally, as technology has made the external environment more fast-moving and unpredictable, the need for a new kind of leadership is stronger than ever. Charities now need to be able to respond much more quickly. To be able to adapt, people need to be aware of issues beyond their own job descriptions or donor categories; they need to be able to use their initiative and be empowered to act.

We have found that there are relatively few leaders who are both very effective and whose objective is to help make their organisations be donor-focussed. The ones who have both these qualities act less like chess-masters – knowing all the answers, seeing every move that is needed on the board, deliberately implementing carefully planned strategies – and more like gardeners. They see their role as nurturing the right environment, one in which everyone knows the common goal and is empowered to take action.

The most effective donor-focussed leaders have the same attitude to developing great relationships with their colleagues –nurturing, collaborative and empowering – as they strive to be with their charity’s supporters.

We believe you can improve your chances of leading in this way by focussing on three areas: vision, people and culture.

Vision - Define and champion what success looks like, and why it matters.

a) **Your organisation’s purpose - focus attention on why changing the way you work with supporters is something you must do, not just something you should do.**

Change is usually hard, however much you may personally think it is the correct thing to do. Your colleagues will not work differently unless they connect to the reasons for the change (that make sense to *them*).

- How concrete and clear is your organisation’s purpose to all your colleagues? Explore ways you could help everyone become clear what positive change your charity is aiming to achieve?
- Find ways to continually reinforce why this purpose matters. For example, create regular story-sharing opportunities (for example, in all team meetings).
- Create and promote regular opportunities for interaction between fundraisers and those on the front line so that everyone feels close to the mission. Unless you model that these project visits / meetings are important, some people rarely ‘get round to’ using them, so show that connecting to the mission is an important part of everyone’s job. This is not just applicable for certain roles. Sara Whiting and her colleagues at Hope and Homes for Children made a point of enabling receptionists to go and visit the work of the charity (which required travel to orphanages in Eastern Europe), because they are just as important (perhaps more) in shaping donor’s experiences than those whom most charities prioritise for such trips.

b) **Your definition of success - define and reinforce what success looks like in terms of your supporter's experience or relationship with your charity.**

Assuming your colleagues feel motivation to do things differently, we should not further assume they know what it is that we want them to do. What are we all aiming to achieve when we interact with our supporters? Help your colleagues understand completely clearly what great donor-centred fundraising looks like. Unless they know what success looks like, they are likely to focus on something else, like securing a donation, as the sole objective.

- Define what success looks like very clearly in terms of the way your supporters experience or build relationships with your charity. What do you want everyone in your charity to aim for?
- Ask 'how can we engage our supporters better? What does that look like and sound like?' Ask 'If we knew it was possible to achieve this kind of success in engaging supporters, what would we do differently?'
- These actions can only really work if they become important beyond the fundraising teams. Deliberately involve people from across the organisation, listen to their point of view and help them see the benefit of donor-focussed fundraising to their objectives.
- Make sure that this focus on success in terms of the donor experience is reflected in everyone's objectives, both team and individual.
- Make sure that the donor experience is regularly reported on, and that team meetings are used to discuss the findings, celebrate success and to seek ongoing improvement.
- Find ways to reinforce your vision for the supporter experience, for example by regularly asking supporters what they think, sharing supporter's tweets and letters with all teams, or organising a cross-departmental thank-athon.

People – Build great relationships

a) **Inside-out leadership – change yourself first**

Leadership coach Penny Ferguson advises that great leaders act in such a way that those around them act as leaders able to think for themselves. It is very tempting for a leader to play the role of the expert, always providing others with the answers. Though it rewards your ego, this behaviour increases everyone's stress because it inadvertently causes your colleagues to use their initiative less and depend on you more.

- Acknowledge that the signals we send others in every interaction affect how they think and feel about their own abilities. At its simplest, resist the temptation to do most of the talking. Deliberately ask other people what they think, and do it often. Initially, they may not realise they have answers, but the more you practice this coaching style of leadership, above all with the belief that others are capable of leading themselves, their confidence and thinking skills will improve.

b) **Trust - give time to your relationships**

To succeed, any strategy depends on all the people who are going to implement it. All too often, leaders do not spend enough time building healthy relationships with the people in their teams. As a result, people do not trust you or feel trusted by you, and so they fail to implement the strategy with complete conviction.

- Acknowledge that genuine trust makes all the difference to how people behave, and so none of the other strategies will work in the long-term unless you build strong relationships as the foundation. This is of course true of your relationships with donors, but as a leader your first job is to help your colleagues succeed, and that usually means focusing more on your internal relationships.
- Give more time to internal relationships. At its simplest, spend half an hour with each of the people you manage every single week. Who else in the organisation should you regularly spend time with, especially those in non-fundraising teams? To create trust in all parts of the culture, which trustees, supporters and volunteers should you develop strong relationships with?

Culture – Create an adaptable, empowered environment

a) **Shared consciousness – encourage people to think in terms of the overall goal, not artificial silos, and encourage information to be shared across the organisation**

Because any supporter who cares about your mission may be able to help in many different ways (e.g. with a donation, by campaigning, or through their company) it is essential that all your colleagues know what each other is trying to achieve. This makes it possible that in any interaction you are equipped to help the supporter contribute to the mission through the most appropriate way. This will only be possible if you promote a culture in which people share information and care about each other's objectives.

- As often as you can, do activities that mix people up to build trust and smash silo-thinking. Team away days, department days, joint projects are all an opportunity to reinforce the ethos of working towards the common vision.
- Create project groups where the whole group works to a common goal and shares responsibility for the goals that under-pin that.
- Give responsibility to those who display these 'shared consciousness' behaviours.
- Model this intra-team ethos with other leaders, always taking an interest in and supporting other teams' projects and objectives.

b) **Devolved responsibility – empower everyone to think for themselves and take action**

Due to technical and social changes in the last decade, our supporters now share and react to information more quickly than ever before. If our charities are to keep up with their needs and expectations, everyone in our charity needs to be able to use their initiative. The traditional 'chess-master' style of leadership inadvertently makes people over-cautious and disempowered. Slow sign-off procedures may feel safer but they are the enemy of donor-centred fundraising.

- Listen and often ask people what they think, so that you empower everyone to take responsibility.
- Constantly reinforce the notion of taking action as an important value and model this. Ask people how you can support them to make this happen, so that you identify and if necessary help solve what is holding them back.
- Explore ways to make your sign-off procedures far simpler. For example, Joe Jenkins described a values-based approach to sign off, in which the project manager is empowered to use their common sense to involve the appropriate people.

c) **Growth mind-set – model and promote the value of ongoing learning and development**

One of the few things we can be sure of is that the environment in which charities operate will continue to change. Indeed, at the present rate, this change seems likely to keep speeding up. As was highlighted in the Great Fundraising research, if your charity is to repeatedly adapt to what your supporters need, you must create a culture where continual learning is normal.

- Promote a learning environment by investing in learning and development. See it as 'investment' rather than 'spending' because it helps improve the donor experience, and in turn, income.
- As a manager, make time for regular conversations about learning and development during one to one meetings with colleagues.
- Model and encourage a culture which encourages the willingness to evaluate what is working and what is not, and to learn from both. Ask 'what can we learn from this?' and show you are serious about the honest search for answers and solutions rather than placing blame. As Black box thinking by Matthew Syed explains, whereas in many fields people are reluctant to deal objectively with the issues when things gone wrong, the reason the airline industry has made such huge progress in safety over the decades is its willingness to seek to learn from mistakes.

- Clearly investing in courses and conferences is valuable, but even if your budgets are limited, there are still many other affordable practices that make a big difference to your culture. Here are six inexpensive but powerful tactics:
 - Encourage and help people find mentors with whom they can regularly discuss work and development issues. They don't need to wait for a formal mentoring system - encourage them to arrange something informally through colleagues and people in their network.
 - Create a book club for sharing ideas from work-related books. Richard Turner used this to great effect at Solar Aid.
 - Promote volunteer-organised groups such as IOF Special Interest Groups, which hold inexpensive events and provide on-line ways to connect and solve common problems
 - Read and share helpful blogs; encourage others to do the same.
 - As Liz Tait from Battersea Cats and Dogs Home suggests, during team meetings and away days, make time to include team building activities, rather than only discussing tasks and strategies.
 - Encourage everyone to make a development plan to share with their manager. As Liz points out, it can be an incredibly simple document, but the fact that it exists helps you and your manager to value and encourage personal development, and the many ways it benefits the fundraiser, the manager and the donor's experience.

18

How to get donors to inspire each other by sharing your stories

Project 18. Supporters as champions for your mission

Richard Turner, February 2017
Reviewed by: Grant Leboff

The original brief

Most traditional fundraising models fail to recognise how connected people are nowadays and how marketing has changed fundamentally over the past ten years. How causes will win and keep customers is changing too, so fundraisers eager to engage with and retain supporters must ensure their prospects and customers will want to engage with them. This project will look at the basic fundraising model differently, to try to define how supporters in future can be used as channels and networks to spread opportunities, grow income and to provide donors and potential donors with a rich array of rewarding experiences.

For senior management and trustee boards, this project will:

- Show how the rules of fundraising have changed and explain how they can embrace this change within their own organisation.
- Explain the benefits of using the collective 'social capital' of staff, volunteers and supporters.
- Help them understand the paradigm shift that has occurred in business marketing and how this affects fundraising.
- Encourage them to consider other measurements for success that are based on supporter engagement.

For donors, this project will:

- Increase opportunities for donors to use their own networks to promote the causes they care about.
- Make them feel inspired about spreading the stories of their favourite organisations.
- Show how they can advocate for your cause and make it crystal clear to them on the emotional WHY of your work.

1. Summary

How did a small charity grow its annual unrestricted income fivefold in five years without significant investment in fundraising? How did a start-up charity in the US become a household name throughout fundraising and grow its income without any advertising spend? What is the mindset of the charity that results in community fundraising three times the national average and a fourfold net increase in income raised over four years? What is a key ingredient of one of the most successful fundraising campaigns in the UK?

There is a completely different way of looking at fundraising, based on radical thinking that is taking place in the business world. It has been implemented, with great success, by some charities in the UK and the US—and it is grounded in fundraising principles. Fundraisers can start implementing it now. In the long term, it could very well transform the whole way we think about fundraising.

This Commission on the Donor Experience (CDE) project examines that approach and gives practical actions, relevant to charities of any size, that can be started immediately.

‘Supporters’ or ‘Donors’

The word ‘supporters’ is deliberately chosen over ‘donors’, as this approach is about how anyone who is interested in your cause or mission can help attract funds, whether they give or not. Adopting this approach will also have a significant impact on improving the donor experience.

i. Principles

Many thought leaders believe that, as a consequence of the Internet providing the first many-to-many means of communication, the rules of marketing and sales have changed. If that is the case, it is not unreasonable to consider so too have the rules of fundraising. If we can understand what changes are taking place and the behaviours people now adopt, fundraisers can begin to adapt their approach. This knowledge will give fundraisers the courage to implement change that improves the donor experience because it is entirely strategic in raising more funds, not just the right thing to do.

The following is a summary of the paradigm shift proposed by thought leaders in marketing and sales, as well as its implication for fundraising:

- 1. In a world of abundance of information, it is much harder to attract attention.** The traditional sales funnel (using the metaphor of a funnel that is wide at the top and narrow at the bottom) is no longer effective. The principle is you target the many to get a response from the few, as it worked on the basis that attention was plentiful. It no longer is: attention is now scarce due to the abundance of information. Marketing has been about the interruption of someone else’s audience; much of fundraising works on this basis, especially individual giving. Now that attention is scarce the model no longer works.
- 2. We are all now channels (organisations and individuals).** Word of mouth is more efficient and, as it feels more authentic coming from an individual, it has greater value than authoritative and institutional voices. If you recognise everyone is now a channel, then they have the potential to spread your story or share a bad experience (whether they are a donor or not).
- 3. We have ‘social capital’.** It is stronger when people tell their network of friends, family and colleagues about your charity than when it comes from the charity itself, as the ‘social capital’ they have with their network is greater than yours. Social capital is the strength of the relationship built with people over time. You can actually help increase the social capital of your supporters by providing them relevant content that they wish to share.
- 4. In this increasingly connected world, you just do not know to whom people are connected.** We are now connected in ways we have never been before. So, if your supporters advocate on your behalf as champions for your mission, this might not just lead to individual gifts, but also opportunities with foundations, corporate partners, major donors and even statutory funders (or the opposite if people have a bad experience).

- 5. We use social proof to make decisions.** We trust the recommendations of people like us. Peer recommendations count and the best ask comes from someone we know and trust who shares our beliefs. This applies even more in a world where information is abundant. If social proof applies to giving, then how can you get people to inspire others and spread your story to their own network? The ask or recommendation is better coming from peers than the charity itself. This is a different approach to thinking about how you can get people to give money.
- 6. Your reputation is built on what other people say about your organisation.** This is more powerful than your brand, i.e. what you say about yourself. Your reputation is what other people say about you. An increase in your reputation will lead to more inbound leads and opportunities, and it will be a better use of your time in responding to and engaging them.

Charities could continue to focus on response-driven techniques measured on direct donations received. These are highly measurable, but as they become less effective the pressure to adopt even more intensive messages, or to target more people, to provide the direct response will increase. This will inevitably lead to more people having a bad experience, which they will share. These intensive high volume tactics focus only on getting donations and do not seek to uncover supporters interested in the charity's mission and helping spread its story. More may be raised in the short term to counter the declining trends, but your reputation will not be enhanced, and it is less likely to encourage advocates. The paradigm shift helps explain the symptoms we experienced in 2015 and 2016.

ii. Actions

Immediate actions

- 1. Understand the paradigm shift: why your marketing needs to change and how this affects fundraising.** Fundraisers face huge pressures to deliver results and change is not easy to implement. Without understanding how the world has changed, it is far less likely a charity will have the courage to adopt a different approach, even if its fundraising is becoming less effective. Read books like *Sticky Marketing*, *The New Rules of Marketing & PR* and *The Networked Non-Profit*. Set up an internal book club to discuss what the paradigm shift means for fundraising.
- 2. Adopt a mindset of how to inspire people to spread your story.** Stop thinking in terms of how to target people for money. Use this new mindset to help you make decisions about what activities to do and what to prioritise.
- 3. Ask the questions: What is our purpose? Why do we exist? What is the problem we are best placed to solve?** Set out to answer these questions. So that people can clearly advocate on your behalf, you need to be crystal clear on what you believe. Articulate WHY you do what you do, not just WHAT you do. Your WHY is nearly always emotional. A critical outcome is to develop a consistent story that you can use to engage people.

Finally, share this project document with your CEO. Their buy-in is critical, both to give fundraisers permission to take up this approach and to help set the WHY of the organisation.

Long-term actions

Once you have clarified and agreed on your WHY (which could take weeks or months depending on your organisation), then focus on the following:

- 4. Determine your 'meta' or mission story.** This should be the overarching story that your entire organisation tells and uses based on your ambition/purpose/focus. Use classic storytelling frameworks, such as hero-villain-obstacle or 'sliding doors', to help tell your story in a compelling and emotional way.
- 5. Empower your supporters to share your story.** Identify people and organisations who share your beliefs. Give them permission to spread your story and actively engage them in communications, activities and events that inspire them to do so.

6. **Provide an experience that donors will talk about and recommend to others.** This is particularly key at the point of donating. It is another way to inspire people to spread your story.
7. **Be ready to react.** Have a plan in place when opportunities come to you as your reputation builds. Be on the lookout for what gets the attention of audiences who share your beliefs.
8. **Determine new measures based on engagement.** Focus on the measures that help encourage you to do the right activities, not just giving or return on investment (ROI).

You could start these actions immediately but they will be far more effective if you have clarified your mission/purpose and the stories you tell have a consistent basis.

Building on the principles of fundraising

Although this approach develops from understanding the change in the way people now behave and act, many of the actions are at the very core on which fundraising is built (see the case example of the NSPCC Full Stop campaign, Action 5). It also builds on many of the practices advocated in *Relationship Fundraising* written by Ken Burnett and first published in 1992. The proposed approach prioritises areas that often receive less time and resources, such as focusing on telling your story well and delivering exceptional donor care, as they are now of even more strategic importance to attracting attention and inspiring supporters to be champions of your mission.

19

How to demonstrate the difference made by donors' generosity

Project 19. Evidence of impact and effectiveness

Ben Russell and Susan Pinkney, April 2017
Reviewed by: David Gold

The original brief

This project will look at how charities can communicate their impact, what donors would like to see and how charities can show donors that their money is making a difference.

For senior management and trustee boards, this project will:

- Explain how they can demonstrate the successes and achievements that a donor's gift has made possible.
- Show why their fundraisers should embrace the 5Fs and be famous for frequent, fast, fabulous feedback.
- Explain why a balance needs to be made between immediate funding goals and providing impact evidence that will help build a positive, long-term relationship with supporters

For donors, this project will:

- Increase their understanding on how their donation has made a difference.
- Increase the number and quality of stories they receive about the impact and outcomes of the work they are supporting.
- Reduce the chances of donors being annoyed by receiving further asks before they have heard about the effectiveness of their previous gift.

Summary

Giving to charity is an opportunity to do something worthwhile with your money and an opportunity to make a difference. Every donor's most pressing question is 'Will my gift be valued; will it make a difference?'. A donation is much, much more than a transaction. It is a gift borne out of concern for a cause, people's human desire to help achieve a charity's aims and the desire to help the people that charity supports.

This project will look at how charities can start building relationships with their supporters by communicating their successes, achievements and impact. It will look at what donors would like to see and how charities can show donors that their money makes a difference.

Including information about charities' work—their outputs, achievements and outcomes—can be a useful part of communications to donors. That does not mean being prescriptive about how we measure or describe our success, achievements and impact. Nor does it mean replacing other messages about the need for help, problems in the world and potential solutions.

It does mean responding to the apparent interest among donors to know more. Executives and trustees rightly feel responsible for maximising the funds available for delivering their charitable objectives. Faced with challenging targets and often armed with a highly sophisticated understanding of what motivates donors to give, fundraisers may rely on messaging that focuses on the need for more funds at the expense of redress for funds received. Leaders must weigh rising demand for impact evidence with immediate funding goals to ensure donors have the information they feel is needed to build a positive, long-term relationship with the charities they support.

We looked at evidence of what charity supporters would like to hear from the charities they support, and we carried our own polling to inform fundraisers and communicators. As well as asking what people would like, we also asked practical questions about how people would like to receive information and whether they were happy with the volume of communications they receive, which we hope will help charities get the balance right for their supporters.

After all, whenever someone receives a gift, it is only natural to say 'thank you', and it is only natural to say how a gift has made a difference to you.

Actions to consider:

- 1. Include some content about your achievements in follow-up messages to donors.** This may seem obvious, but it is crucial. Donors say they are interested in finding out more about what charities do and the difference they make. Other research shows that simple, human-scale and individual stories cut through, particularly when citing the voices of service users. Polling and focus group research finds that people express high levels of interest in finding out more about the impact of charities and the work they do. This represents an opportunity to connect with donors, build a relationship with them and take them on a journey.

The desire for this kind of information is amplified amongst younger donors, where there is a real thirst for this type of information. This suggests that charities should test stories about their impact as an integral part of their wider communications to donors.
- 2. Talk about more than the ask.** Some people tend to express irritation if they are asked for more after giving—although we do know that many people do give nonetheless. Some express the feeling that fundraising asks outweigh information about achievements. Of course, charities need to ask, but telling stories about work and achievements can help thank donors and build positive relationships.
- 3. Easily understood, compelling and human stories of how charities help are likely to cut through.** People claim they would like to hear about who the charity helps, the overall impact of donations and how the charity helps. This chimes with experimental research that suggests simple human examples are the most effective, although it may be worth backing them up with the bigger picture.
- 4. People say they prefer easily controlled communications.** When asked, email is clearly the means of communication that people prefer, followed by newsletters. See CIDE project 13 – *Giving donors choices and managing preferences*.

5. **Most people say they are satisfied with the level of communications they receive.** More communications is not necessarily needed. When asked, most people say the amount of communications they receive from the charities they support is about right. The key issue is to ensure that communications build positive relationships to support further engagement in the future.
6. **Test as you go.** Social experiments demonstrate that just showing an effectiveness score can be ineffective or negative. So mix up stories about your work and its outcomes with other approaches.

Key points:

1. **There are many ways to show your successes and achievements.** It is important to be clear about your objectives and how you are helping your supporters be part of that success. Everyone wants to be part of a success. People like to feel a sense of achievement; supporting charities and building a relationship with them can be a great way of doing that. The impact a charity makes on its beneficiaries is all part of that success.

Of course, there is much debate about how to measure impact in charities. Measures range from simple feedback about people who have been helped or statistics about charities' activities to sophisticated metrics and social return on investment measures. Feedback on actions and results are useful. More detailed models can provide valuable evidence for sophisticated funders, information for evaluating work and be a good source of raw materials for telling a charity's story to different audiences.

2. **Talking about impact can have negative consequences, so testing is important.** Claimed and actual behaviour can often be quite different. Some experimental studies show that talking about impact in the wrong way can have little, or even negative, effect on people. It is very important to test messages and learn from experience.
3. **The differences between what donors say about impact and how they act does not diminish the need to communicate impact.** Some may conclude that because claimed and actual behaviour are not the same, polling of donor opinions can be ignored. However, the difference in stated preference and action points to a risk that must be averted. Demand for greater transparency on effectiveness is likely to grow and, unless we are able to incrementally change donor responses to information on impact through improved communication, donor trust may fall.
4. **Assessing and communicating impact can make organisations more effective at delivering their charitable objectives.** Measuring and communicating success and impact is about more than soliciting donations. We live in a world where people increasingly expect organisations to be accountable to stakeholder scrutiny. This trend cannot be ignored and early adopters will likely reap rewards in the long run. However, those rewards are not limited to fundraising. Impact measurement and transparency challenge organisations to improve, can reveal waste and lead to innovation.
5. **Communicating impact really matters.** The report clearly stresses that donors want to know more about the impact of their gifts, successes, achievements and any shortcomings that may be encountered. Donors want to see outcomes rather details. They are more interested in evidence of achievement than organisational information.

So, fundraisers should work to satisfy the apparent interest among donors to know more and to have that information presented in the right way for them.

- a. Feedback on the impact of each gift is essential.
- b. It is no good waiting weeks to get back to a donor with that feedback.
- c. In a celebratory way, fundraisers should frequently remind donors of the difference they make.
- d. That feedback should be very good indeed.
- e. The charity sector should aspire to be famous for great feedback. Ken Burnett puts it like this: 'Fundraisers should aspire to the 5 Fs – to be *famous for frequent, fast, fabulous feedback.*'

6. **Get the balance right.** Whenever someone receives a gift, it is only natural to say ‘thank you’, and it is only natural to say how a gift has made a difference to you. The project urges charities to get the balance right and show fundraisers how to do it. See CDE project 4 – *Thank you and welcome*.
7. **Include everyone in your feedback.** One in five donors complain that they do not hear from a charity after they have given a gift. Always say ‘thank you’ and always give a gift. Recognize too that another one in five donors would prefer not to hear from you again. So offer those donors a clear and easy way to make further communication choices, including a full opt-out if that is what they wish. See CDE project 13 – *Giving donors choices and managing preferences*.
8. **Develop appropriate metrics.** Focusing on overheads or fundraising costs creates a perverse incentive for charities to avoid investment, risk and innovation. (Can the authors enlarge on the consequences and remedy for this?). EG. Charities must, therefore, put more attention into explaining how they work and why.
9. **Telling our stories better.** Public perceptions of charity impact are far worse than the realities. Essential expenditure on activities, such as admin and fundraising, are also lower than the public believes. There are good stories here.
10. **Do not always ask for money.** Many people feel that the fear of being inundated with requests for more money prevents them from giving. There is a tension between the desire to know more and worry that a donation will lead to many requests for more money, which donors identify as a real barrier to giving. So, with your feedback, provide reassurance that the donor’s gift is always appreciated.
11. **Understand your donors.** Even when charities believe they are telling a story about what they do, they also are asking for money. The donor may focus solely on the latter. So, present your stories with this in mind.
12. **Provide easy to grasp examples.** Donors are unlikely to have conducted research before donating, so good examples of achievements will be particularly important at the start of your relationship.
13. **Mitigate ‘annoyance’ and ‘awkwardness’.** These are words donors use to express how they feel when asked for money.
14. **Take care with language and how you use emotion.** See CDE project 1 – *The use and misuse of language* for guidance on the complex subject of language and CDE project 6 - *The use and misuse of emotion*.
15. **Recognise that charity communications are not just about reporting on fundraising impact.** They also build trust and relationships, educate people about the cause, provide information and advice, and directly impact the cause itself.



Being honest and telling the truth well about fundraising costs

Project 20 fundraising investment

David Ainsworth and Andrew O'Brien, April 2017

The original brief

Donors often express concern about any money being spent on fundraising, despite evidence that appropriate investment in fundraising enables their contribution to be more effective by leveraging further donations. This project will identify the extent to which donors' concerns on this topic are a barrier to giving, and how better fundraising practice can ensure that 'the truth told well' about fundraising costs can reassure those donors who are willing to engage with the issue.

For senior management and trustee boards, this project will:

- Show why it pays to be transparent about fundraising costs.
- Help the charity's leadership to understand that investment in fundraising is a requirement for an effective charity.
- Explain why a stop/start mentality to fundraising investment is damaging for fundraising effectiveness.
- Introduce the idea that some people are disposed to be donors and some are not. Pay more attention to your supporters than the general public.
- Give them the confidence to defend and explain fundraising costs and activities if challenged.

For donors, this project will:

- Increase their understanding on how their donation has made a difference.
- Reassure donors about the costs of fundraising and explain the need to invest in the future.
- Increase the confidence donors have in the charity sector by improving transparency and providing clear information on fundraising expenditure and investment.

Overview

Actions to consider:

- The Commission has undertaken qualitative research (focus groups) with donors. Donors are concerned about charities wasting money on salaries, on market and fundraising, and on offices. This is consistent with research from NCVO. <https://tinyurl.com/m2gue29>
- Many donors express this concern, but they also think that ‘spending on fundraising must be effective’, because charities continue to spend on it.
- Donors are reassured when charities are upfront and honest about how they spend their money and like to see charities concerned about their financial effectiveness.
- We think that this means that it is vital that charities are able and willing to explain their costs of fundraising. Not all donors will be interested in this information, but for those who are interested, it is important that individual charities explain their own approach.
- In situations where stakeholders; donors, the public, and the media; ask questions, each charity must be able and willing to explain openly and honestly.

Principle 1

Investment in fundraising is a requirement for an effective charity

Charities are a better long-term return if they think of fundraising expenditure not as a cost, but as an investment that secures longer-term income, the charity’s sustainability and ability to better deliver its mission, and its longer-term relationship with supporters through a better experience.

If all individuals saw fundraising in this way, charities would please more donors and raise more money.

Attitudes to and strategies for investment are the concern of each charity, but there is a perception in some parts of some fundraising departments that cheapest is best and that investment in doing things right is not a priority. This perception is often a consequence of the organisational culture created by CEOs and trustees which demand fundraisers reduce costs and increase income. However, this is tragically wrong. Decisions should be based not on lowest cost but on long term income. (See CDE project 15: *The role of trustee boards and senior managers.*)

For example, charity managers must balance the short term income needs of the charity with long term financial health.

Certainly, giving more confidence that fundraising investments are being spent wisely and having a positive impact can only help to improve public confidence, creating a more supportive environment for charitable giving.

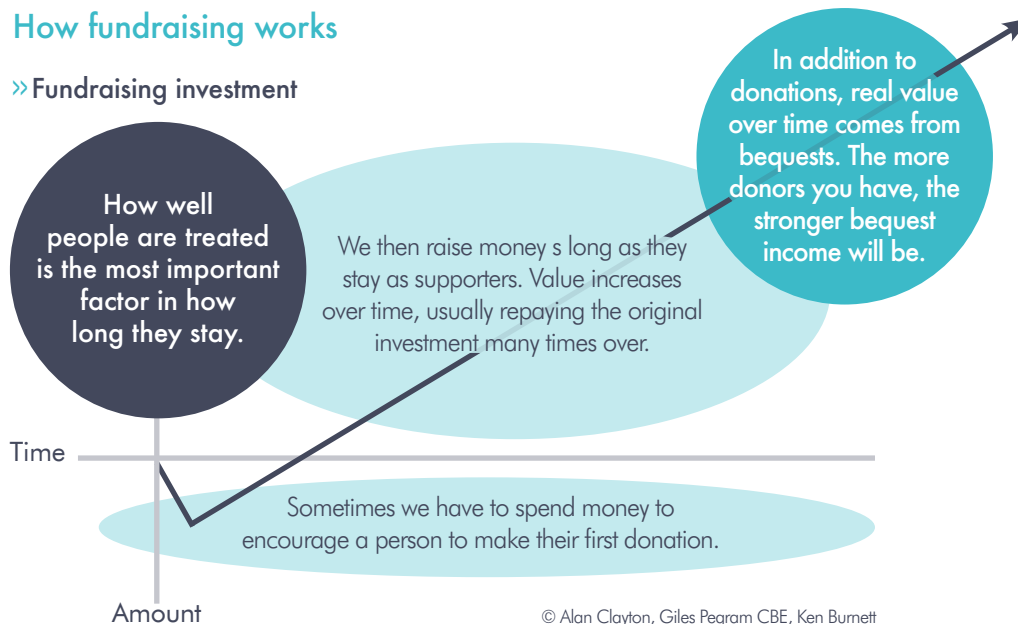
There are charities failing because they have underinvested and invested badly. This applies both to investment in fundraising activity and in people.

(The chart, below, is a simplified version of a chart commissioned by Giles Pegram and produced by Allan Freeman. A rigorous version, including actual figures from a variety of charities, is currently being worked on by Lenka Morgan from REAL fundraising. It will be added to this project when completed.)

Why expenditure on fundraising should be seen as an investment, not a cost.

How fundraising works

» Fundraising investment



Principle 1: Actions

- **The case for prudently investing a sensible part of a charity's reserves in fundraising (versus other options such as stocks and bonds) should be clearly considered, and, if appropriate, clearly made.**
Charities are obliged to keep reserves. Sometimes using reserves for fundraising is a good thing; sometimes not. Each charity needs to make conscious judgements based on their situation.
- **SMTs and Trustee Boards should understand the importance of seeing fundraising as an investment.**
- **Every charity should decide how much to invest in fundraising and in what areas, linked to the strategy of the charity, its appeal to prospective donors, its position in the sector, and its attitude to growth.** The charity must decide if it wants incrementalism or step change. This is an organisational decision and not a fundraising one.
- **Charities need to avoid stop/start activity in fundraising.** If the SMT and trustees want incremental growth, this should determine the fundraising director's three-year plan. If the SMT and trustees want significant growth, then this should drive the fundraising director's three-year plan. A stop/start mentality is a great drain on donor income.
- **Each charity should openly discuss the fundraising business model in SMT and with the board of trustees.** The factors that influence that business model are too many to be explored here. Matthew Sherrington's blog <https://tinyurl.com/n7mb2s2> is a very good read.
- **When investing for growth both there needs to be a strong business case which is challenged and monitored carefully.** When writing a fundraising plan for growth, it should have enough organisation buy-in so it is not about the fundraising director. It must include the finance director, the CEO, and trustees.
- Fundraising managers should, where appropriate, make the case to invest more in recruiting and retaining the right people.

- **CEOs need to be completely aligned with fundraising directors and their fundraising strategy.** Together, they can be certain that the fundraising strategy is embedded into the organisation by trustees and SMTs. In doing that, fundraising directors and CEOs equip them to defend decisions on fundraising investment.
- **When creating the fundraising strategy and plan, the fundraising director should start by looking at the charity's own experience, strengths and weaknesses.** Use what you know and have learnt and then use step change/innovation where opportunities exist or needs drive you. Do not start with a blank sheet of paper, and Do not ignore your own history. And certainly, do not ignore your existing donors who have got you where you are.
- **Every employee in the charity should be able to explain why the charity invests in fundraising.**

Principle 2

Good measurement means fundraising is more cost-effective, and donors like that

As both outlay and income can be measured, or at least assessed over time, there should be a clear understanding among donors and fundraisers that fundraising investment is generally a good thing for the charity.

Principle 2: Actions

- The returns charities get from a balanced fundraising portfolio should be carefully recorded, understood and made available to donors. Fundraising (the development of relationships with donors) done well is fundamental and can be an impressively cost-effective activity; therefore, measurement should be according to a balanced scorecard. It needs to include short, medium and long term metrics. It should include a return on investment.

This is covered fully in CDE project 3 - *Satisfaction and commitment*.

Principle 3

Charities must be accountable for the costs and benefits of their investment in fundraising

Accountability and transparency and effective measurement and planning are key. However, these alone are not enough. The charity must proactively communicate to be successful.

Donors have every right to be concerned about the effectiveness/efficiency of fundraising. They are entitled to proper explanation and making their decisions on whether to support the charity.

Principle 3: Actions

- **Fundraisers should remember that donors are giving to the cause, not the organization.**
- **Explain the charity's situation positively.** Without implicitly criticising others.
- **Charities should report about their performance in their annual reports, including addressing failures where appropriate.** This reporting should be considerably over and above the statutory requirement.
- **Charities should be honest about their fundraising strategy in their annual report.** Simply and clearly write about the charity's approach to fundraising.
- **Fundraisers must be able to explain their organisation's approach to fundraising to donors who want to know** but they should not assume that they all want to know
- **Where donors perceive that the charity is wasting money on them, endeavour to act accordingly.** This drives better fundraising investment. Where the charity is unable to act on their wishes, explain why. (See project xx 'giving donors choices'.)
- **Give fundraisers a Q&A sheet on how to answer questions about investing in fundraising, and perhaps give an example.** Maybe ask the following: "We would like to spend £3 of your £10 donation to help encourage another donor to give £10. Do you think that's reasonable?"

Principle 4

Some people are disposed to be donors and some are not

Principle 4 Actions

- **It is generally best to focus investment on those with a pre-disposition to support the cause.**
- **A charity should not try to invest in getting committed non-donors to give.** Pay more attention to perceptions and feedback of supporters than of the wider general public, for this reason.

Principle 5

A charity should only undertake activities which its senior leaders would feel they have sufficient evidence for a robust defence if challenged

Principle 5: Actions

- If an activity does not pass the above test, a charity should not do it.
- Fundraising directors should observe and assess all their fundraising activities. Any that a reasonable donor might find unacceptable should be identified and explained and justified to the CEO.
- Charities must be ready to defend their actions when questioned. If a charity's trustees and chief executive are not willing to defend a charity's practice in public, if called upon, the charity should question whether it is something their organisation should continue.



Building partnerships around the donor experience

Project 21. Working with suppliers as partners

Gary Hancock, Brian Searle February 2017
Reviewed by: Giuseppe Iantosca

The original brief

Some of the public's interactions with fundraisers are not directly with charity staff but with people working for a commercial third party supplier. This project will aim to show fundraisers how to be an effective client and so to get the most for their donors from their prudent and well-managed investment in supplier services.

For senior management and trustee boards, this project will:

- Show why treating suppliers as partners in your fundraising can improve performance and long term results.
- Help their understanding of how to assess the results of suppliers and look at how they motivate and incentivise suppliers.
- Explain the benefits of having clear professional standards and help define a shared view of quality that goes beyond mere compliance.
- Introduce them to a range of ideas to improve the relationship with suppliers.

For donors, this project will:

- Reduce the chances of donors being made uncomfortable by approaches from suppliers who have unreachable targets.
- Reduce the number of complaints made by donors about fundraisers.
- Make it hard for donors to recognise the difference between an in-house team and supplier when interacting with a cause (apart from the required solicitation statements).

Fundraisers have many responsibilities. The first, and most obvious, is to our causes: those whose needs drive us in our work.

This commitment must not, however, be at the expense of our other responsibilities: to manage our fundraising programmes wisely, to respect the needs of our supporters and provide an excellent giving experience, and to ensure that the values of the organisations for which we work are present in the choices we make.

We make a critical choice when we ask commercial third-party suppliers to work with us to deliver our fundraising programmes. Fundraisers have been challenged to make sure that we focus as much on how we fundraise as on why we fundraise. For many charities, it would be impossible to deliver the right kind of donor experience without the support of suppliers, so it is imperative that we build genuine partnerships with the suppliers we employ and engage them in our mission.

Suppliers or partners

Too often, suppliers are viewed not as genuine partners, but as service providers: the end of a supply chain. They represent the commercial decision of a charity to outsource a task that may be too difficult, too costly or too risky to deliver in-house. The commoditisation of supplier relationships and channels has in some cases led to an apparent commoditisation of the donor experience. In our drive for efficiency and our desire to ensure that we achieve the best possible return on our fundraising investments, we are in danger of forgetting that fundraising is about more than financial outcomes: long-term, sustainable success depends on emotional engagement and on building genuine relationships.

Short-term campaign-based supplier arrangements are not consistent with long-term supporter relationships. There is a tension between the long-term investment required to build the operational capacity that can deliver a high-quality supporter experience consistently and the short-term need to deliver immediate results without the financial risk of commitment to suppliers.

The more distance we put between ourselves and our suppliers, the more detached we become from our supporters. A poor understanding of the relationship and engagement that supporters have with our organisations leads to inappropriate targets and key performance indicators (KPIs) and unrealistic service-level agreements.

We know that focusing exclusively on financial measures will compromise the quality of the donor's experience, but often we struggle to articulate clearly what we are trying to achieve and how to measure it. The more closely we work with suppliers, the more effectively we will set the right goals, and the better we will understand the mechanics of the supplier services we commission.

If we are to ensure that our partnerships with suppliers are not just effective, but also reflect our values and benefit both our target populations and supporters, we must ask critical questions of ourselves and our ways of working.

How, then, should we work effectively with suppliers, our fundraising partners?

- How do we make sure that everyone is working toward clear, common goals?
- How do we manage the work that our partners do for us?
- How should we measure and reward the value that our partners bring us?
- How do we ensure that the public understands and supports our approach to working with fundraising suppliers?

Guiding principles

Of course there are, many different types of suppliers: across our fundraising programmes, we will have different commercial relationships with organisations that are helping us with our efforts. In every case, our aim should be to create a genuine partnership where both parties are working towards common goals that match and promote the values and vision of our organisations.

Seven principles can guide us in pursuing that aim:

1. **Treat suppliers as partners**

Businesses we employ to work on our behalf are often the public faces of our organisations. It is common for suppliers to engage more with the public and donors than many charities themselves. We must invest time and resources in these relationships to ensure that they succeed. Critical suppliers should be treated as partners and as extensions of our organisation, with shared accountability for key outcomes: results, donor experience and compliance.

2. **Establish clear professional standards**

When commissioning any activity, we have a duty to ensure that we are operating to the highest professional standards and that those standards are delivered by our agency partners. We must exercise the necessary due diligence and evidence the capabilities of those we choose to work with. We also need to ensure that we have the necessary knowledge within our own teams to provide capable and effective management of the activity we ask our partners to carry out on our behalf.

3. Create a shared definition of quality

If we are to achieve genuinely high-quality engagement with the public in a way that reflects our values, we need to understand what donors expect when they come into contact with our fundraising partners. Focusing solely on compliance as a simple proxy for quality will not improve the relationship we have with supporters or raise quality standards to the level to which we aspire. All organisations need to define what quality means for them and how they will measure it.

4. Take a broader view of key performance indicators

Perhaps due to its very nature, fundraising has been largely or even entirely target-driven in the past. We need fundraising KPIs that go beyond income and return on investment. We must look to the long term, ensuring that we set the right targets for the long-term relationships we hope to build with our supporters. Our expectations need to be realistic if we are to avoid placing too much pressure on fundraiser performance.

5. Everyone should be aligned with a clear statement of goals

Everyone involved in fundraising, from trustees to fundraisers who engage with the public, must work to a consistent set of performance and quality measures. Senior managers need to understand the mechanics of what is being commissioned to be able to provide effective management, exercise due diligence and assume organisational accountability for that activity.

6. Commit to long-term supplier relationships, with appropriate incentives and rewards

In order for partners to make the right investment decisions to deliver high quality donor experiences, we should support them by building long-term supplier relationships that include long-term commitments. The importance of the quality of the donor experience over time must be reflected in the nature of our relationships with our partner suppliers.

7. Celebrate the contribution of supplier partners

Too often, the contribution of our suppliers towards our fundraising success is not publicly acknowledged. If we seek to change the public's perception of professional fundraising, then we must begin to credit our partners publicly for the success of our campaigns.

Actions

What practical steps can you take towards implementing these principles into your ways of working?

1. Treat suppliers as partners

'Our suppliers are an extension of our team.' How do you make that concept meaningful? What practical steps can you take to create a genuine partnership approach?

- When you start working with a new supplier, agree on shared goals for the relationship: how do you want to work together, and what does each party need to make the working relationship successful?
- Ask what you can do to make your supplier feel part of your team. This might include providing materials to bring your brand into the agency or supplier's workplace, or inviting members of your programme's team or service users to talk to your supplier's team about your work.
- Immerse your supplier teams in the mission and work of your charity. If practical, let them visit your work in the field. Challenge them to be as passionate about and as committed to the cause as your own teams are.
- Don't just meet to plan campaigns or review performance: make time throughout the year to review the relationship with your supplier team.

1. Establish clear professional standards

For 'professional' to be more than a word, you need to take steps to ensure that you and your suppliers have a shared understanding of the standards that you expect as you work together:

- Make sure that you and your team are clear about what professional standards are relevant to the service that your supplier is delivering, and ensure that you have evidence of their accreditation.
- Review and observe the training and development programme of members of the supplier team who will be representing you or working on your campaigns.
- For every campaign or activity, seek evidence from your supplier that the members of their team who will represent you have been trained in relevant quality and compliance standards and in how to represent your brand.
- Make sure that supplier management is part of the learning and development programme for members of your staff who are responsible for managing supplier relationships. Your organisation is responsible for everything that your suppliers do in your name, and managing supplier relationships effectively and professionally is a critical part of the role of your fundraising team.

2. Create a shared definition of quality

A consistently high-quality donor experience is possible only if you have defined what quality means for your organisation. While compliance is important, it must not be the only measure of supporter experience. How should the experience delivered by your supplier make donors feel, and how should this be measured, monitored and reported? Depending on the service your supplier is providing, your definition of quality should include:

- The features of an effective conversation. Fundraisers represent your organization: what guidelines must be followed?
- How your brand should be reflected in the behaviour of the people who are representing you. What does a good conversation with your charity sound like? What tone of voice and language choices reflect your brand values?
- The service levels that will underpin the donor experience e.g. turnaround times for responding to supporter enquiries.
- How you will monitor the extent to which your partners consistently deliver the quality standard you have agreed with them. This may include site visits, mystery shopping, call listening and reviewing complaint logs.
- How you will understand how your supporters feel about their experience and what is important to them. This may take the form of regular supporter satisfaction surveys or follow up calls / emails to a sample of supporters after they have been contacted by a supplier on your behalf.

3. Take a broader view of key performance indicators

Fundraising KPIs should promote outcomes that drive donor experience quality and long-term supporter value, not just short-term results.

In practical terms this means:

- Secure a mandate from leadership to establish new KPIs that focus on quality of donor experience, compliance and supporter lifetime value, not just acquisition cost and immediate return.
- Take a more realistic, pragmatic view of short-term financial returns to enable investment in and testing on long-term goals, innovation and new approaches: work with finance colleagues to build a business case for a long-term approach.
- Seek the involvement of your supplier partners. Use their expertise to help define the measures of success.
- Make sure that everyone involved in managing the relationship, on both client and supplier teams, understands the agreed KPIs.

4. **Everyone should be aligned with a clear statement of goals**

Genuine partnership requires a shared vision and a shared understanding of the donor experience aims. This means that you must:

- Ensure that your organisation's leadership understands and formally agrees to the more holistic, long-term definition of success: quality, compliance and lifetime value.
- Develop a management information framework that enables client and supplier managers to work together to explore the details behind headline reporting.
- Take time to share insights such as research and donor feedback and to discuss the implications for the delivery of the donor experience.
- Make sure that members of your senior team spend time with your suppliers. Don't just meet for big presentations, but to get to know them, their business and their role in helping you to deliver the donor experience.

5. **Commit to long-term supplier relationships, with appropriate incentives and rewards**

"Long-term commitment" is easy to say, but requires concerted effort to bring about, from the agreement of the first contract through every step of the working relationship:

- Start by securing a mandate from your organisation's trustees and senior management team to invest in building quality, long-term partnerships.
- Talk with partners to understand what is involved in delivering your requirements: the risks and the investment involved from a supplier's perspective.
- Formalise mutual accountability in contracts. Define what each partner needs to deliver in order to make the programme a success.
- Ensure that ways of working are reflected in contracts and service level agreements.
- Be clear about what you expect from the relationship: if you are working with a supplier because of their expertise, don't pay them only on a cost per transaction or cost per acquisition. Structure performance rewards to reflect KPIs that focus on quality of donor experience, compliance and supporter lifetime value, in addition to financial metrics.

7. **Celebrate the contribution of supplier partners**

Communicating the role of partners positively and proactively will help to increase the public's understanding of how fundraising works in practice and the important role that commercial suppliers play. Some practical steps you can take include:

- For fundraising campaigns, have your team and the fundraising agency work together during campaign set up to create a list of FAQs to encourage a consistent response to the public.
- When your PR team publish positive news stories, take the opportunity to promote the role of your suppliers / fundraising agencies in making the campaign possible.
- Even in the best-run partnerships, mistakes can happen. Work with your suppliers to agree on procedures to deal with problems if they occur and to make sure that public messages are both clear and consistent.
- Share success stories and lessons from campaigns and supplier relationships with colleagues in other organisations. Collaborating across the sector will help to improve ways of working for all.
- Celebrate together, with charity and suppliers on an equal footing.

Conclusion

Fundraising partners have helped to transform our sector and the effectiveness of our work, both by innovating and by building the capacity to deliver successful and mutually beneficial fundraising and donor relationships.

By adopting the principles outlined above and taking action towards building genuine partnerships with our suppliers, we can build more positive relationships with supporters and increase public understanding and acceptance of the role that suppliers play in enabling us to achieve our mission.

More guidance

More guidance on this topic can be found in the Institute of Fundraising's Guide: 'Successful Partnerships for Sustainable Fundraising: A Practical Guide for Charities Working With Agencies', which provides detailed advice on the following topics:

Planning and preparation

- How to decide whether a third-party supplier relationship is the right option for you
- Defining the role of fundraising partners
- Benefits and risks
- Regulations and responsibilities

Selecting, assessing and appointing a partner

- Identifying potential partners: what questions to ask
- Creating an RFP and running a tender process
- Evaluating responses and providing feedback

Establishing the partnership

- Agreeing the contract: what to include
- Setting service levels and KPIs
- Planning a programme of work
- Briefing and training fundraisers

Monitoring, reviewing and evaluating

- Monitoring: what to look for, what questions to ask
- Reviewing and evaluation
- Addressing issues

The guide also includes case studies from two charities, looking at:

- Establishing the foundations of a successful long-term partnership
- Reviewing and evaluating the work of fundraising partners

The guide can be downloaded at <http://www.institute-of-fundraising.org.uk/library/iof-successful-partnerships-for-sustainable-fundraising/>

Additional reading

Find more ideas and perspectives on the relationships between charities and fundraising suppliers at SOFII:

Ken Burnett on how to be an effective client:

<http://sofii.org/article/how-to-be-an-effective-client>

Mark Astarita on the importance of recognising the role of suppliers:

<http://sofii.org/article/working-with-suppliers-building-partnerships-based-on-value-for-money>

Andrew Papworth on briefing consistently and comprehensively:

<http://sofii.org/article/its-hard-work-being-a-client-these-days-part-1>

George Smith on the role of suppliers and what questions to ask:

<http://sofii.org/article/working-with-suppliers-part-one>



Getting donors to tell the good stories about your work

Project 22. Media relations and the public face of charities

The late Tim Kitchin, December 2016
Reviewed by: Mario Ambrosi

The original brief

Charities enjoy enormous public support. As a result they come under scrutiny but sadly the media too often focuses on the poor performing few rather than the excellent practice of most charities. This is as true for fundraising practice as for other areas. This project will look at how to build better relations with the media so that coverage is better informed about the totality of practice and that good fundraising, is not undermined by collateral damage from exposure of incidents of bad practice.

Project 22, “*Speaking Out*”, recognises that mainstream media reporting makes a significant difference to the way we feel about donating to charities. It suggests six simple principles for the not-for-profit sector to generate more positive coverage that builds donors’ trust and confidence.

The principles are straightforward:

1. Accentuate the Positive

- Communicate the positive impact of your work as much as the problems you address.
- Specifically, work to bring project outcomes to life, particularly by using them to authentic voices and enliven your annual reporting

2. Grow the Grassroots

- Seek out the authentic voices of your most committed supporters and beneficiaries, and inspire them to talk freely on your behalf.
- Specifically, allow, empower and encourage local evangelists to use social media on your behalf, and agree on protocols and training to engage with mass media

3. Work closely with the media

- Build collaborative media partnerships that engage readers and viewers, and which offer win-wins with media and advertising supporters.
- Specifically, create fundraising propositions that have the media as a partner, rather than merely as a 'channel.'

4. Keep it Personal

- Communicate at a human level, across all channels, at all times.
- Specifically, explain beneficiaries' experiences as personal stories that connect with donors' real lives, and encourage donors to tell their own stories of emotional connection.

5. Be Brave

- Don't be afraid to assert a measure of moral authority - in a humble way. Don't be afraid to lead change on behalf of your donors and beneficiaries.
- Specifically, stand up for the work you do by celebrating its impact, while still acknowledging the work that remains to be done. Behave as if you were providing 'shareholder guidance' and quarterly forecasts.

6. Be Decisive

- Admit quickly when you screw up - and change things.
- Specifically, take decisive actions to honour donors' needs in terms of your behaviour - and tell people when you've done it.

Next Steps

Whilst adopting these six simple principles should help individual charities to build trust and grow market-share for their organisations, they will not be enough to help the charitable sector to improve and innovate as a whole.

Left unfettered, market forces will tend to produce more and more noise and less and less cut-through, simply raising the cost of supporter acquisition and retention. What is needed instead are new forms of co-ordinated sector leadership that ground fundraising less in lifestyle interruption and more in the inspiration and restoration of operating effectively. However, what these measures should look like is beyond the scope of this paper.

THE COMMISSION ON THE
DONOR
EXPERIENCE

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This is as of 21st June 2017

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Summary of research



YouGov

“In January 2017, YouGov conducted two focus groups with charity donors amongst the general public for the Commission on the Donor Experience. The workshops were held in central London and in central Manchester. The groups gave feedback on specific recommendations arising from the Commission on the Donor Experience”

Summary of feedback on key aspects of the donor experience – findings from qualitative groups.

This document lists the questions that were asked in the discussion guide that relate specifically to individual projects identified by the Commission on the Donor Experience, and participant views in these specific areas. They are presented in the order in which they were asked.

Do you remember seeing or hearing anything about charities in the media recently? (P20)

Participants were quick to report stories about charities that they had heard in the media. Most of these stories painted the charities in a negative light, concentrating on bad practice that in some way related to spend (often around staff salaries) or an aggressive or inappropriate fundraising technique. There was strong opposition to “besieging” the most vulnerable with donation requests and a perception that this is widespread.

Do you tell positive stories about this charity to other people? (P18)

There was no strong indication from participants that they act as advocates for their chosen charities – more that giving to charity and the relationship that they have with specific charities are more of a personal issue, and not one that they discuss with other people. This remains the case even when the relationship is a good one. Much is learned from sponsorship requests, which provide the means through which participants find out which charities their friends are aligned to.

In what way do you receive most communications from the charities you support? PROBE telephone, face to face, email. (P11)

Participants tended to receive communications in ‘traditional’ ways – through letters or newsletters primarily, though a minority reported receiving emails. There was broad agreement that emails were the preferred form of communication, though a minority still expressed a preference for written communication.

Have you ever spoken to any of their fundraisers? What was your experience of them? (P14)

Across the board, fundraisers were painted in a negative light. On street and doorstep fundraisers were felt to be too aggressive in their techniques whilst not being knowledgeable enough about the cause for which they were working. Telephone fundraisers approaching existing donors were felt to be equally tenacious, “constantly” trying to persuade them to increase the size of their donations.

What are your views on the language (words and phrases) that charities use to communicate with donors? (P01) Do they use *emotional* language in their communications? Is this a good thing? (P06)

In both groups, participants felt that there was an over reliance on emotional language and appeals that are perceived to manipulate potential donors into giving. That said, participants did understand why charities behave this way, but it often left them powerless, upset or frustrated when they were unable to donate. The focus on such messages should become the beneficial power of the charity, rather than the gravity of the problem.

Do you feel that you have enough choice in terms of the relationship and interaction that you have with your charities? (P13)

The ability to tailor communications to their choice seemed to be missing, and also seemed to be an unmet need – though, for many it provided the opportunity to ‘opt-out’ of receiving communications, there was a wider benefit – namely, providing an opportunity for the charity to demonstrate that it is listening to its donors and wants them to have a say in the relationship it has with them.

What about your sense of satisfaction as a donor? Do the charities that you donate to ever ask if you are satisfied? (P03)

Only one participant in each group was broadly satisfied with the relationship they had with their chosen charities and felt that there was little that they would change. For others, there was a sense that the relationship they had with charities was one-way, with charities only getting in touch when they needed more money. Tellingly, those who had a positive relationship had been asked for feedback through survey mechanisms, which demonstrate both that the charity is listening and that it is striving for self-improvement.

Do they acknowledge/thank you for your donations? (P04)

Though few participants were able to recall a time when they had been asked for a donation specifically, there was also little appetite for donors to be thanked on an individual level as it may risk the perception that the charity is wasting money.

Do you feel that you go on a *journey* with them as a donor? (P05)

In truth, the use of language such as ‘journey’ and ‘relationship’ did not resonate with donors, who disliked such terms and did not feel that they actually enter into a commitment with the charities they support. This may have to do with their need to manage the terms of engagement and a concern that the terms of such a relationship are dictated by the charities themselves.

Do you feel that you understand the impact of your donations? (P19) Do you see them as a customer-focused organisation that treasures the needs of donors? (P16)

As discussed, participants felt that the tone of the communications they receive from charities tends towards the emotional and dramatic in order to entice potential donors. There was little sense that communications or propositions provided success stories showing the beneficial impact of donations received. The sense of sustainability – helping people to help themselves – was a very important theme to participants, and charities may look to acknowledge it in their communications.

Do they talk about their trustees or their senior board-level directors at all? (P15) What about their overall leader – their chief executive or CEO etc.? (P17) What about the partnerships with other organisations that some organisations have? (P07)

No appetite existed at all for charities to be writing to donors about their internal workings or about how they are managed and run. Participants had no interest in this, it was felt to be a waste of money, and furthermore it makes them feel their charity is more like an organisation (with overheads and expenses) rather than a charity. This information should be available on the website, however. Nor was there any interest in hearing about the partnerships that a charity has, for similar reasons.

What if they asked you to leave money in your will to them? (P10)

There was support for legacy donations, though none had them in place. However, participants were reticent around discussing their own wills and unsure if they would respond to a prompt to do so. Where charities are able to help them with their will this was viewed positively, as long as this was not accompanied by a strong sales push.

“In July 2016, Qualtrics conducted a survey of current donors for the Commission on the Donor Experience. The survey was carried out online with a representative sample.”

Findings from quantitative research

1a. Overall experiences of charities that respondents already support:

- 20% rate their overall experience as 7* (as good as it can be)
- 3% rate their overall experience as 1* (as bad as it can be)
- Almost two-thirds (63%) rate it good (5*/6*/7*)
- 15% rate their overall experiences as bad (1*/2*/3*)
- A quarter (23%) rate it 4* (neither bad nor good)

1b. Overall experiences of charities that respondents do not already support:

- 12% rate their overall experience as 7* (as good as it can be)
- 9% rate their overall experience as 1* (as bad as it can be)
- 4 in 10 (40%) rate it good (5*/6*/7*)
- Over a third (35%) rate their overall experiences as bad (1*/2*/3*)
- A quarter (25%) rate it 4* (neither bad nor good)

2. Worst experiences:

- 13% have no ‘worst experiences’ to report
- most common refer to street and door-to-door fundraising, notably feelings of harassment, being pestered, asked to give more than they can afford etc, but also feelings of guilt at not being able to give more.
- some report on their feelings about how the sector is run (e.g. paying salaries) instead of their personal experiences of being asked.

3. Best experiences:

- 10% have no ‘best experiences’ to report
- Most common reasons: being thanked sincerely; understanding what difference their donation makes; the politeness/good humour of the asker; being respected when they say no; the transaction being quick
- Some named best charities & causes: Parkinsons, Marie Curie, Macmillan, Child Sponsorship (esp. World Vision), Air ambulances, St Teresa’s hospice in Darlington

4a. Thinking about the last charity supported, did you feel emotionally blackmailed?

- Agree – 23% (men 20%, women 25)
- Neither – 18%
- Disagree – 56% (men 62%, women 56%)

4b. Thinking about the last charity supported, were you sincerely thanked?

- Agree – 57%
- Neither – 25%
- Disagree – 18%

4c. Thinking about the last charity supported, do you know how the donation was spent?

- Agree – 56%
- Neither – 25%
- Disagree – 20%

4d. Thinking about the last charity supported, do you enjoy supporting this charity?

- 4e.** Thinking about the last charity supported, do you wish you were not on their database/files?
- Agree – 23%. no/basic tax 8%, higher rate 16%
 - Neither – 26%
 - Disagree – 51% None of the 80+
- 5a.** Thinking about your overall experiences, do you think that supporting charities is a burden?
- Agree – 18%
 - Neither – 28%
 - Disagree – 52% None of the 80+
- 5b.** Thinking about your overall experiences, does supporting charities bring you joy?
- Agree – 66%
 - Neither – 28%
 - Disagree – 8%
- 5c.** Thinking about your overall experiences, is supporting charities an important part of your life?
- Agree – 49%
 - Neither – 36%
 - Disagree – 15%
- 5d.** Thinking about your overall experiences, is supporting charities a duty?
- Agree – 41%. No/basic = 8/9%, higher rate 19%
 - Neither – 34%
 - Disagree – 25%
- 5e.** Thinking about your overall experiences, do charities let you choose how or when you hear from them?
- Agree – 54%
 - Neither – 30%
 - Disagree – 16%

Methodology and survey details

- The survey was conducted online from 7th July to 14th July 2016.
- Respondents were screened to ensure that they have given money to at least one charity in the past four weeks. This established a binary variable (donor/non-donor) and no further data was collected on frequency, size, method or destination of gift.
- The sample size was 1,040.
- Partial responses were not recorded.

The survey sourced respondents to meet the following quota, to ensure a representative sample:

Gender

Male: 493
Female: 507

Age

16 – 19: 59
20 – 24: 83
25 – 29: 84
30 – 34: 83
35 – 39: 76
40 – 44: 83
45 – 49: 89
50 – 54: 85
55 – 59: 74
60 – 64: 66
65 – 69: 68
70 – 74: 50
75 – 79: 41
80+: 59

Region

North East - 41
North West - 111
Yorkshire and the Humber - 84
East Midlands - 72
West Midlands - 88
East England - 92
London - 129
South East - 136
South West - 84
Wales - 49
Scotland - 85
Northern Ireland - 29

Tax

I do not pay income tax - 26%
I pay basic rate (20%) - 62%
I pay higher rate (40%) - 11%
I pay additional rate (45%) - 1%