11d

Making the connection, bring donors into your own community

Project 11d. Community

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THE COMMISSION ON THE
DONOR
EXPERIENCE

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' communiations 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.)

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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.