THE COMMISSION ON THE DONOR EXPERIENCE

13

Giving choices and managing preference

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PROJECT 13 – SUMMARY

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.

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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.

Part One: Introduction

Most of us buy things every day. Multiple transactions, most of them functional.

Some of our purchases carry some brand associations: we trust Waitrose for quality or Tesco for value. Shopping at the same place can be convenient and comfortable.

Sometimes our purchases bring with them the values we associate with the brand, and the emotions start to run deeper. We love Apple products and would never go with anything other than an iPhone; you might go to John Lewis because you trust that you will get good information, helpful service, reasonable value (never knowingly undersold) and reliable after-care if it goes wrong.

These are the sorts of brands which become a part of our lives: we love the product, or enjoy and trust the experience of shopping there and so absorb them into our life's habits.

A different sort of engagement

Giving to causes is altogether different. We are asked to make a payment but not come back with a purchase; we freely give our hard-earned money to people we've never met and expect very little in return. At worst, we are distrustful of the experience that may follow.

Yet, supporting a cause you care about can bring benefits and pleasures that can far exceed the satisfaction of a good buy. Charities are the vehicles through which we can help achieve change. We can do something to help stop someone else suffering from a terrible disease that has touched a loved one. We can give someone in a bad situation the chance to lift themselves out of it. We can support a much-loved local nature reserve where we've spent many a happy Sunday afternoon. We can make a stand against human rights abuses, or show we care about refugees when so many others seem to see them as a threat.

Helping to create change can touch us deeply. Help us to live out our values, and express the best parts of ourselves. Give something back or create some good out of hard and painful experiences.

In turn, the rewards can be rich. Supporting causes we care about can be enjoyable, rewarding, informative, challenging, mind-broadening, can bring new experiences, or be just plain fun. Become more involved and you can end up feeling that you are gaining far more than you are giving.

This is the opportunity. To help people give freely and get pleasure from their giving. It's a special and humbling opportunity, because we are asking for people's trust and their belief in us to do the work and make the change on their behalf.

There is an opportunity to get it right. To nurture this bond, respect this generous individual who is choosing to give. To find out more about them, why they are interested and what they want to do. To say thank you, and show them what progress you have made. To bring them close to the people they are helping. To communicate with them in a way and at a time that suits them. To give them choices about how they would like to stay in touch, and how often, if at all.

Done well, each donor should go on a journey: from reassurance, to trust, to growing value (for them and you) to loyalty.

Recent history: a past we need to move on from

As we all know, too often charities have got it wrong. We have huge needs and ambitious goals we must reach to make possible the work we want to do this year. We need to meet targets and achieve value in terms of one-year ROI. We need to recruit more donors and upgrade the ones we have. We have databases of donor details and this is the resource that we can mine into with mass campaigns to achieve what we need to achieve.

At one level, this is all completely understandable. Individually we are probably doing things with the best of intentions, committing only the smallest aggravations. Collectively, the generous British public is beginning to complain about what it actually feels like from their end. The numerous approaches; no gift seeming to be quite enough; the sheer volume of need arriving on our doormats. Words like 'pestered', 'bombarded', 'angry' and 'guilty' have now become commonplace.

Too often, we are not really engaging with the generous individual behind each donor record. At worst, we are damaging their goodwill. Making them feel suspicious, used and put upon.

Yet the bond between a donor and a cause they've chosen to give to is a pledge of trust: a bond which potentially has immense and important value, but one which we are too often damaging beyond repair. Collectively we have been shamed into sitting up and taking notice. The Etherington Review and subsequent development of new bodies, structures and guidance will bring updated standards of practice and tighter regulation. Designed to protect donors, the equal concern for fundraisers is that it remains practically workable and does not also bring unintended consequences which hamper the ability of fundraisers to build relationships with every donor who can.

Offering choice and control

Offering donors choices and managing their preferences – finding out what supporters want and listening to what they say – is a vital part of getting it right. Put the control back into the hands of the donor and they won't need to worry that one gift will lead to an onslaught of mail. Send good communications, sharing real and current needs that bring them closer to the cause, show them what you are achieving together and they will start to trust you. Invite them closer, matching their interests and experience with your opportunities, and they will start to gain real value from the relationship (as will you). Keep developing the relationship and you may well develop a lifetime of loyalty followed by a legacy that allows them to make their greatest impact after their own life has ended.

Offer choices and manage preferences and it's one important step to valuing our donors as the people who care enough to make our work possible.

This is borne out in research: research conducted on behalf of the *Commission on the Donor Experience* by Qualtrics *'The Donor View'* found that 'Having their wishes re contact respected is welcomed by donors and positively affects overall experience; it keeps donors informed on their terms and sometimes increases the likelihood of giving again/more.'

And yet, for most charities, offering choices is restricted to the donor being given the opportunity to offer their email address or telephone number, and opt in or out of a thank you letter. Further choice, if offered at all, is too often relegated to the small print.

In research commissioned by NCVO's working group on how to enable donors to give consent ('Charities' relationships with donors: A vision for a better future' published 27 September 2016) they found that 'The ability to opt out of contact, and to choose by what method and how often to be contacted, would increase donors' willingness to share their personal information.' They also find that 'two thirds of respondents said their trust would increase if charities were transparent and gave control over how personal data was held and shared.'

The NCVO working group set out to 'consider how donors can take more control of their giving – specifically, how they give consent to the fundraising relationships with the charities that they support.' It lays out a vision for donors, including that 'In particular, donors and potential donors will be able to easily express their preferences about whether and how they wish to be contacted by the charities they support, including whether they wish to stop being contacted… Charities will respect individuals' preferences and ensure they can update or confirm their preferences at regular intervals appropriate to the nature of the contact and channel.'

This report shares the recommendations of the working group on how to enable donors to give consent. At the time of publication (January 2017) the paper is being considered by the Fundraising Regulator, with a view to being incorporated into the Code of Fundraising Practice.

Offering choice is just a part of valuing donors

Of course, giving donors choices and managing their preferences, alone, is not enough. The best fundraising comes from cultures that truly value donors as the people driving the engine at the heart of the organisation, and who put a belief in the rightness of this above all else. This means leadership, culture change, and taking brave decisions that put long-term relationships and lifetime value ahead of one year targets.

Once a charity is thinking like this, then all sorts of other things follow: sending communications your donors will really want; communications that build their understanding, bring them closer to the people they support, show donors that they are appreciated and share what has been achieved together; communications that share real needs as they arise; invite donors closer and offer them different ways to engage.

In this project we look at the rationale for giving donors choices and managing their preferences, and examples of charities who are really thinking about how to engage with their donors so that the charity's approaches never overstep the mark from welcome to unwelcome.

We have also looked at the commercial world – to find out what we can learn from organisations beyond the charity sector, which we hope will bring ideas, insight and inspiration.

And we have looked at the behavioural science and psychology of offering choices and managing preferences, to see what that can teach us, and how this backs up a fundraising approach that believes that if you trust in donors, nurture them and treat them well, they will repay that generously through long-term support and value.

This is just one of many projects you will find best practice and recommendations on complementary aspects of how to make the donor's experience of being connected to your charity the best it can be.

In practice all of these project areas are, or should be, interconnected; and the very best fundraising will come from being concerned with each and every one of them. Paying attention to giving your donors choices, for example, will not in itself add up to a good donor experience, it is just one component of a relationship that feels truly good and satisfying.

Taken together, the outputs of these projects add up to what it means when your charity truly sees its donors as its partners, truly considers what it feels like to be a donor, and makes that experience enjoyable, rewarding and mutually beneficial. Do all of this and you will see huge benefits as your donors stay longer, support more, tell their friends, and make your cause a part of their life.

Part Two: The Theory

> ***"There are only two ways to influence human behaviour: you can manipulate it or you can inspire it. When companies or organisations do not have a clear sense of why their customers are their customers, they tend to reply on a disproportionate number of manipulations to get what they need".***
> Simon Sinek, *Start With Why*

Let's start at the very beginning...

Before getting into the specifics of donor preferences, choices and control let's begin with the principles of human behaviour that govern how people make decisions.

As direct response copywriter Andy Maslen neatly puts it, we are not in the marketing or fundraising business. At the most fundamental level, we are in the business of "behaviour modification".

We seek to influence someone to choose to change their course of action. To click that petition. To type in their email address. To request a brochure. To give a donation.

Each of these things constitutes an action. Prior to coming across our fundraising communication – be that a website, a chat with a street fundraiser, a direct mail approach, a Facebook post – in the wider world life goes on.

Our challenge is to identify people who we feel may share our commitment to our cause. They may see themselves in the good fight our charity fights.

True engagement with a charity's message is an emotional connection: a shared belief and viewpoint that stops someone in their tracks and catches their attention.

To help demonstrate this, consider the very basic units of drama. The smallest unit is called a 'beat'. Several beats create a scene. Several scenes create an act. And so on. A beat can be broken down in three parts: action, conflict and resolution.

This maps very helpfully with a model posited by creative director Steve Harrison in his book, *How to do better creative work.* He calls it the 'problem/solution dynamic' – in other words, the equivalent of the conflict and resolution stages.

Let's bring this to life. At any moment in time, people (our potential donors) are going about their daily lives (action). They engage with a piece of communication that catches their attention because it speaks of a need that matters to them (conflict) and they are stirred to do something - be that financial, voluntary or other action - to help make a practical difference (solution).

Action, conflict (problem) and resolution (solution). Three simple steps at the heart of how we communicate. And in fundraising terms, three steps which bring the donor and the charity together for mutual benefit.

> ***"You can't advertise today and quit tomorrow. You're not talking to a mass meeting. You're talking to a parade".***
> Bruce Barton (advertising pioneer and the second 'B' in AMV BBDO)

But the crunch point in this journey is the moment of conflict/presenting a problem for a person to help solve.

You've caught their attention but what next? Is your aim simply to heighten their awareness (say, through a brand advertising campaign on checking symptoms of an illness)?
Or do you wish to stir them to take action there and then (e.g. text whilst on the train) or, once home, sign up or take an action online (e.g. a sponsored run)?

This is the moment where a 'suspect' becomes a 'prospect' – from a passer-by to a 'handraiser' telling you "I believe in your cause". So much hinges on the decisions made in this moment.

And as behavioural science teaches us, a great deal of it is far more complex, subliminal and irrational than we might think.

This project report is not the place to unpack the vast and fascinatingly nuanced discoveries of behavioural science in technical detail – books and papers by Daniel Kahnman, BJ Fogg and Richard Thaler should be your first port of call for the fully tested methodologies.

But here we will provide a whistle-stop guided tour, in layman's language. Because as we'll discover, the implications on preferences, choices and control are significant.

So here we are. With our prospect, at a crossroads.

A potential supporter has a dilemma to ponder. Whether they are sufficiently emotionally affected and rationally reassured to take an action that supports your charity's cause, whatever that action may be.

How can you make sure someone takes the action desired? The equation looks like this, as distilled in Adam Ferrier's *The Advertising Effect:*

Action = Motivation + Ease

Each of these three components, collectively, form the bread and butter of this theory section of Project 13.

But to give a short written explanation first: Motivation covers the desires, goals, emotions, social patterns and beliefs that inform who we are. They are the makeup of a person's character. Their background, their temperament, their interests and passions.

Ease concerns factors like the environment in which you present someone with a choice (on the street, on a landing page, in an insert, for example). And that environment can be affected by a myriad of factors. In other words, context is everything when it comes to making decisions.

Visual: The component of motivation + ease

Individual Incentive	What's in it for them? Will they be rewarded and to what extent?
Social Norms	What will others think of them if they undertake this behaviour?
Ability	Do they have the resource, competency and skills to do behaviour?
Opportunity	Does the environment allow the behaviour to happen?

(Source: BJ Fogg, adapted by Ceri Perkins)

Table: What motivates people to join your charity's cause?

The motivation	The descriptions
Ideology	The charity shares my view of the world and how it works or should work
Beliefs	This charity share my beliefs about a right or wrong in the world and how to solve it
Capability	This charity has shown they have the capability to do the good that I want done
Specifics	The act is a specific, achievable good thing that I can do
Environment	The act benefits me, my life or my immediate world

(Source: NFP Synergy)

Let's take a sign up landing page for an example.

How is it designed? Is the user experience of the form intuitive? Does the accompanying copy present sound benefits? What will a person receive in exchange for their data? Can the prospect get a taster of what they will receive (or are they offered an incentive for signing up)?

Then there are the dull practicalities that can also make or break whether the decision environment is optimal. How quickly does your website load? Does it break mid-flow? Is the back-end functioning set up so that sometimes no matter how hard a person tries, they recieve error messages while they try to donate?

And if there weren't enough barriers, does your potential recruit have the knowledge and skill to complete the action you're asking of them? There's a reason paper donation forms are still a staple part of campaigns to an older age cohort; a text to give request is not something that would sit comfortably within that group's technical capabilities.

We're just scratching the surface. But already you can see how in each step along the way there are so many potential barriers to someone responding to their need to act, making a decision and being able to follow that through to its completion.

Traditionally, our industry – and the marketing sector as a whole – has placed a huge amount of emphasis on the first part of this equation, motivation. This is doubtless an important area to address but very often, what's stopping someone from seeing their decision through is far more basic. It's about how easy it is to do.

It's fair to say that all evidence in this field of study points to an amusing truth: we are, as a species, inherently lazy. We like things to pootle along just as they are, thank you very much. The reason why is simple: there are just too many decisions our brains need to make every millisecond of every day. Or as niftily expressed by Thomas Davenport in *The Attention Economy,* human bandwith "is finite".

This tendency to laziness you sometimes hear referred to in smarter circles as 'inertia' or a reliance on 'defaults'. Any form of direct debit is an ingenious model based on defaults. Because it's just that bit too much effort to cancel your gym membership, isn't it? So you continue to not go whilst paying for the privilege and feeling increasingly guilty…

It's the reason why most charity donation pages aren't as effective as they could be. If you're getting a bounce rate of 60 per cent, that means 60 per cent of people who made a decision to give and tried to give, weren't able to because of your site. Imagine if, as a shop owner, 60 per cent of your customers in a day came up to pay at the till but, due to a machine fault, were turned away completely? You'd consider it commercial suicide. Yet it's a common problem online. If it's too much effort, you turn people away.

So, without question, making it easy for people to engage really matters – as much as understanding their motivation.

Daniel Khaneman's experiments, documented in his book *Thinking Fast and Slow,* posit two systems of thought: System 1 (automatic) and System 2 (processed). An example of System 1 is opening the doors to your flat. It's a habitual routine; you do it without even thinking. It's a heuristic; a shortcut in your 'thinking' circuitry.

System 2 is much slower. It's the stuff that needs lots of thought. Doing your tax return. Choosing a car. Things that aren't part of your day to day rituals, require deeper consideration, involve higher risk and take more time to process.

"We are all creatures of our environment", says Paul Dolan, psychologist and author of *Happiness By Design.* "Much of what we attend to, any resulting behaviour, will be driven by unconscious and automatic processes… So any attempts to understand human behaviour and happiness must properly account for the effects of external context as well as internal cognition."

Sound familiar? Here we have another pair of phrases - external context, internal cognition – that cover **ease** and **motivation**. These principles ring true regardless of the sector. Here's one model of decision-making created by McKinsey for the commercial sector. Pay close attention to the column marked 'Drivers of behaviour'. Consider how these principles apply to your charity:

Table: McKinsey Choices Framework

The CHOICES framework of behavioral drivers created by McKinsey's Behavioral Insight Lab helps determine relevant interventions.

CHOICES[1]	Drivers of behavior	Examples of interventions
Context	People gauge information relative to other, mostly implicit benchmarks	**Prime:** Playing German music in a wine store significantly increases sales of German wine
Habit	People often act and judge without deliberation, following habits or mental shortcuts	**Expect errors:** To reduce the risk of customers losing cards, ATMs usually return the card first, then dispense cash
Other people	People are influenced by what other people do, say, or think	**Tell about others:** Tax fraud is reduced by –15% when taxpayers are informed that most people actually do not commit fraud
Incentives	People respond to "objectively" better offers	**Give immediate gratification:** Little treats for good deeds today (eg, cash for going to the gym) can help fight procrastination
Congruence	People act to preserve a positive and consistent self-image	**Activate commitments:** Public commitments work better than promises to oneself (eg, to quit smoking)
Emotions	People are influenced by emotions and the physical state of their bodies	**Create ''yes'' emotions:** A photo of a happy/attractive person had the same demand effect for a bank as a mortgage-rate cut of 100 basis points
Salience	People take in messages that are easier to process and remember	**Show consequences:** Regular information on energy usage and price increases drives energy consumption down more than twice as effectively as yearly updates

McKinsey's Behavioral Insight Lab developed the CHOICES framework based on the work of Dan Ariely, Uri Gneezy, Daniel Kahneman, John List, George Loewenstein and Richard Thaler.
McKinsey&Company

Seeing things from the donor's perspective

As charity fundraisers, we like to think that our cause and especially our latest campaign sit at the centre of the universe. Perhaps for the most committed advocate that may be true.

But for the majority there's a thicket of other stuff our message needs to cut through – job anxieties, family duties, ill pets, the list goes on.

Therefore not only do we need a message that can grab their attention amidst all this competing paraphernalia (by knowing what motivates them). Once we've got their attention, it has to be straightforward to do (make it easy).

And the point at which someone decides to tell a charity their choices or preferences is the most critical moment of 'conflict' of all.

Let's take a second, though, to clarify what we mean by preferences and choices. The two are often confused. To help us, here are the definitions according to the *Oxford English Dictionary*:

Choice. *An act of choosing between two or more possibilities.*
Preference. *A greater liking for one alternative over another or others.*

Let's again use a sign up page as example. In addition to inviting him or her to share contact details, you offer a prospective supporter the chance to receive a) your weekly newsletter and b) your e-appeals. These are the two choices you have presented. But whether a person picks one, the other or both cannot be assumed a preference.

This is because a preference, as economist Daniel Hausman explains in *Preference, Value, Choice and Welfare*, is comparative: "To prefer something is always to prefer it to something else… preferences require that one weigh alternatives."

So let's first debunk a common assumption: that by asking supporters to tell us their preferences, we are doing exactly what they want. We are not.

We are learning what a supporter wants out of the menu of options we, at the charity, are presenting them with. Those choices do not necessarily reflect every choice a supporter may wish to have.

And what do we mean by a preference in a charity context? To give a few examples, from a communications standpoint we might be referring to:

Channels.
How would they like us to be in touch with them? By email? By phone? By SMS?

Frequency.
How often would they like us to be in touch? Weekly? Monthly? Annually?

Message Content.
What types of information is of interest to them? Newsletters? Appeals? Sponsored events?

Why do we offer people choices and ask them to share their preferences?

The benefits can be numerous but they all add up to one big advantage: **relevance**.

This, like engagement, can too often feel like a wishy-washy term bandied about to sell consultancy with a high price tag. But as inspirationally defined by Nina Simon in *The Art of Relevance*, it's simply "Killer content. Unspoken dreams. Memorable experiences. Muscle and bone."

Still think that's a bit too wishy-washy? Then let's hark back to our behavioural science friends for proof.

Lives are busy. There are far more important fish to fry than your charity's cause. Unless what you are promising to give me, in exchange for my support, is going to enrich my life.

Hands up if your warm email programme consists of one newsletter sent to your entire base? That, unfortunately, is not communicating with relevance.

If, however, your content is based on the explicit preferences someone has shared with you (I want the newsletter; I'm interested in your international projects)…

…And you are overlaying that with their behavioural data (Where have they been on your site? Where do they drop off? What content have they engaged with?)…

…And you overlay their giving history captured in your database (RFM/LTV analysis)…

..And you are reading letters sent back to you from donors, listening to inbound calls, sitting in on focus groups and interviews.

...then, and only then, are you truly taking relevance seriously.

When less is more

Being more relevant may mean communicating less but with far greater meaning. As a recent fundraising test by Kevin Schulman at DonorVoice proved, "Less is more when the 'less' is determined by understanding donor identity and preference and serving up content, offers, interactions, communications that match it. If this is starting to seem a lot like personalised relationship building, that is because it is."

This approach is many moons away from where most charities are currently. The systems aren't there. The data is not in good enough shape. Preferences are sometimes being captured but not truly driving what happens next.

What we've just walked through builds and builds to a seeming obvious, but crucial, insight about choices and preferences: offering them and having them are not the only thing that matters.

If a personal, relevant and engaging communications relationship with our donor is the holy grail we are aiming for, they are just one part of a much bigger picture. Offering choices does not make a charity donor-centric: it is simply a means to understanding what your donor wants so that you can meet their needs, wishes and interests as fully and as well as you can.

And as your relationship with a supporter develops over time, circumstances may change and preferences be amended and updated accordingly. But it is just one part of a much bigger tapestry of how to be relevant to your donors and show you are listening.

As we've all experienced, there's nothing more frustrating than being asked to make a choice (automated telephone banking menus, anyone?), stating your preferences only to find nothing has changed.

No matter how worthy your cause, your prospects and donors will drop you if you don't follow through on the expectations set and the promises made.

So now we've hit upon the two things preferences can really bring to the table: they can help us be **relevant** to our supporters and provide them with a way to **feedback**.

Preferences are an opportunity for us to listen.

Perhaps "listening", too, feels a little soft for our target-riddled, Excel-driven fundraising culture. But, as Roger Craver pointed out on *Fundraising 101*, we've all paid the price for ignoring donors in recent years:

> *The lousy retention and no-growth rates we're experiencing are related to the way we treat donors. And then fail to listen to the voices of these donors whether they're saying "stop sending me so much mail" or "I can't figure out your donate page".*

So let's dig a little deeper into the science of motivations to understand why this can make or break the psychological processes that underpin how donors tackle choices and preferences.

Understanding supporter motivations

> *"The connection between preferences and choices is conditional on beliefs… Preferences are subjective states that, jointly with beliefs, cause and justify behaviour."*
> Daniel M. Hausman, *Preference, Value, Choice and Welfare*

Hausman's assertion rings true when you consider the irrational processes behind how we all make decisions. But we aren't wired to always make the optimal decision, referred to as 'maximising'. Instead, in our lives we mostly 'satisfice'. We settle for good over great.

If we are honest with ourselves as a sector, responding to a charity's request for our preferences – whatever the context – is not something that anyone will deeply ponder. People want to sign up, update their information or end their relationship as quickly and painlessly as possible. They then quickly move on to the next thing vying for their attention.

> ***"The first role of marketing is to make a decision easy to make. And that means firstly clarity in terms of choice, and secondly it means lack of anxiety. So the first role of marketing is not actually getting preference…it's getting someone non-anxious."***
> Rory Sutherland, *The Wiki Man*

Which means that an awful lot of seemingly 'soft' subjective factors suddenly become of great importance, as they can sway selections at the moment of decision. Have I heard of the charity? What do I remember of recent interactions with them? Does what they say I'll receive in exchange for my data excite me? What does expressing my support say about me to others in my social group?

We are now in the underappreciated realm of 'beliefs'. What Matthew Lieberann, a psychologist at the University of California, defines as the "mental architecture of how we interpret the world". As *The Guardian* fundraising columnist Beth Breeze explains, "Taste is not simply a matter of what we like; our present day choices are also shaped by earlier life experiences…".

As fundraisers, there's a lot we have to get right to reinforce or change beliefs in order to cue the desired action. And, let's be clear, emotions *do* drive actions. As Daniel Goleman's scientific studies in *Emotional Intelligence* reveal: "All emotions are, in essence, impulses to act…The very root of the word emotion is motere, the Latin verb 'to move' plus the prefix 'e' to connote 'move away, suggesting that a tendency to act is implicit in every emotion'.

His work goes far beyond a useful definition; Goleman's experiments proved that "our feelings typically come to us as a fait accompli. What the rational mind can ordinarily control is the course of those reactions."

In other words, perception truly is more important than reality. Folks in the branding world have known this in their bones since the beginning. And as there's now plenty of science to prove it, we fundraisers can now give it the attention it deserves. We can bake it into how we treat our prospects, supporters and donors.

As Rogare's detailed study of relationship fundraising concluded, "Everything we know about how to build a good relationship - as apparent for friends - we can apply to fundraising".

Now we've understood just how closely emotions are tied to beliefs, let's move on to trust.

Trust in me

Research conducted by the Royal Mail Trust in 2015 found that 40 per cent of customers were hesitant to give their data to marketers because they felt they would then be 'contacted too often'. In fact, the report goes further with this damning insight: "Respondents felt that providing contact details would not lead to more relevant, timely and appropriate communications, just more of them."

This is further substantiated by recent Fastmap research (October 2016) into customer attitudes to choice:

> ***"Whilst less individuals agree to receive marketing unconditionally (32.4% vs 50.1%), there is a significantly increased pool of individuals that are prepared to receive marketing given a certain choice (65.9% vs 50.1%)…There are two obvious benefits: a larger pool of individuals to communicate with and those that are marketed to will feel empowered because they have had more input into the choice and hence communicated under the terms they want." to receive marketing unconditionally."***

So let's keep looking at what really matters to audiences, particularly those who support charities. We'll do this by comparing the key findings of two recent independent studies:

What matters most to donors (Source: Abila Donor Engagement Study)

- Money is used wisely
- Good reputation
- Strong belief in mission/cause
- My support makes a difference

What information do donors want (Source: Rootcause)

Information about:
…the impact the nonprofit is making
…fundraising or overhead costs
…the social issue the nonprofit addresses
…the people and the geographical area served
…specific projects for which the nonprofit is raising money

Now, just for comparison, let's look at a piece Bloomerang conducted on why we tend to lose donors…

Why do donors leave? (Source: Bloomerang)

- Thought the charity didn't need them
- No information on how the monies were used
- No memory of supporting
- Never got thanked for donation
- Poor service or communication
- Others more deserving
- Could no longer afford

And if the donor concerns weren't already ringing loud and clear, here are Roger Craver's *Seven drivers of donor satisfaction*, detailed in his book *Retention Fundraising*, based on a study involving over 2,500 charities in the UK and US:

- Donor perceives your organisation to be effective in trying to achieve its mission
- Donor knows what to expect from your organisation with each interaction
- Donor receives timely thank yous
- Donor receives opportunities to make his or her views known
- Donor is given the feeling that he or she is part of an important cause
- Donors feels his or her involvement is appreciated
- Donor receives information showing who is being helped.

There are two things to take from all this. First, the overlap of key donor concerns across the studies is not coincidental. We keep hearing the same issues voiced and yet still return to our target-based spreadsheets.

And, secondly, to our collective shame, fixing these issues is not rocket science. Nor will implementing a new, whizzy CRM system solve it. It demands that we pay close attention to the maligned "soft", human side to our sector. The 'why' that sits atop the data gives you, the charity, a richer picture of how people really feel and behave.

> ***"It is about time we quit trying to shear these sheep – and start loving them a little bit".***
> Bruce Barton

We may see ourselves as a sector, as an industry even. But we do not exist for commercial gain. People do not have to support us. There is plenty else they could spend their spare cash on.

Giving is a philanthropic act that people choose to do because they believe in what you believe in; you stand for something that they feel needs supporting. A cause that chimes with how they see the world and how they see themselves. The shared values they try to uphold or want you to uphold on their behalf.

From a Twitter like through to a pledged legacy sum, supporting a charity is an act of generosity. Having people on our side is a privilege. It is to be respected. It is a gesture to be grateful for and thanked for. The human touch is how you show you are truly listening to them.

> ***"Inside most people there is a good Samaritan, waiting to get out. The fundraiser's job is to understand that sentiment, find the key to releasing the latent goodwill, and then to sustain it and nourish it."***
> Harold Sumption, fundraiser

Ways donors engage (Association of Fundraising Professionals Information Exchange research into giving preferences)

Giving – Donating goods and services, giving money, buying products
Doing – Volunteering, attending events, serving in a leadership role
Communicating – Staying informed, engaging on social media, advocacy

Put supporters in the driving seat

The degree of control you offer people with the choices available, capture their preferences and respond accordingly is how you earn their trust. This directly affects their emotional association with you.

And, in turn, can lead to them taking the positive action that you seek in a way that is mutually beneficial, yet on their terms.

> ***"Our aspiration should be that donors look forward to their next letter, telephone call or email from us. Every contact should move the relationship on. Every communication reinforces the donor's decision to be a donor and increase satisfaction, loyalty and LTV. This requires that fundraisers need to be consummate communicators, consummate storytellers."***
> Giles Pegram, *101 Fundraising*

Once more, you can see how preferences, choices and donor control are just one piece of the puzzle. They are 'gatekeeper' moments; forks in the road.

This is about the bigger supporter journey within which you engage with people for the very first time, in the months or years while you are in touch with one another, and at the point – should the day come - they decide to call time on their relationship with you.

People-shaped fundraising

> ***"Designing for experiences is fundamentally about people, their activities, and the context of those activities"***
> Stephen P. Anderson, Experience Designer

Earlier in this section, we concluded that choices and preferences offer charities an opportunity to a) listen, b) receive feedback and, consequently c) stay relevant.

It's easy to talk the talk of 'donor-centricity', 'supporter-centricity' and the like. But the proof is in more than offering choice and control. It permeates through the very ethos of your charity; your culture. It requires shifting the focus from what the charity achieves to what the charity can help the donor achieve. You will have done your job best when you can get out of the way and simply connect a donor with your cause.

> ***"We have to do it on their terms. Not ours…They have given us the gift of their participation, and they deserve our interest and respect."***
> Nina Simon, *The Art of Relevance*

If you think it sounds cynical to focus on supporter self-interest, go and read the lifetime's worth of direct marketing testing undertaken by the legendary direct marketer John Caples.

Over decades of rigorous statistical testing (detailed in his book *Tested Advertising Methods*) through live campaigns out in the real world, regardless of the product, three things always led to people modifying their behaviour and responding: news, self-interest and curiosity.

If you can inject your fundraising proposition with those three ingredients, you will be framing your 'ask' as less of an ask and, instead, as something far more positive: an opportunity for the donor to participate in.

Conveying that – not asking 'Will you give money? but 'Will you join us in our work?' is the path to meaningful long-term relationships that are as good for your Excel spreadsheets' Lifetime Value figures as they are for the donor's soul.

And that proposition – combined with the ease of completing the action – needs to filter all the way down, right to how you frame choices, preferences and control to your audiences.

But why bother?

Why go to the trouble of giving donors greater control over how they interact with you? Why have a concern for every touchpoint, every interaction along the way from first to last? Why be in it for the long haul, for the whole journey?

Sure, thus far we've made the 'soft' case, rigorously backed up by scientific findings. But for the cynics, what about the 'hard' benefits? Let's refer back to Rogare's study:

> ***"Satisfaction is the number one driver of donor loyalty. Achieve donor satisfaction by giving donors control over what they receive from you."***

And getting a positive donor satisfaction metric is probably on the target list of every head of fundraising in the land.

But as Matt Watkinson wisely cautions in his book *Great Customer Experiences*: "More choice and more decision-making power does not necessarily result in a greater feeling of control. We should aim to give customers control where it is most effective in improving the experience."

So what about the money? Is it worth all that effort? Research conducted by McKinsey and Company (management consultants for business) definitely proves it is. They've found commercial organisations that focus on the entire customer journey perform dramatically better than those who do not. They saw 10-15 per cent greater revenue growth, 20 per cent greater customer satisfaction and 20-30 per cent more engaged employees.

Then there's the travel company Thomas Cook, who with their agency CreatorMail, won the Direct Marketing Association's gold award for their data-driven approach to communications: "As a result we are able to better understand the needs of our subscriber base and are now seeing our highest engagement rates to date because we're sending more relevant communications."

Later in the project, you'll read about a 30 years young fundraising success story of donor-led choices, preferences and control in action.

But they didn't do it because of the coffers. They did it because they cared about how their donors felt. They wanted a relationship, not a transaction. And true goodwill cannot be captured through LTV analysis, however useful those figures may be to you.

Or to quote Albert Einstein, a man hardly unfamiliar with the importance of scientific rigour:

"Not everything that counts can be counted."

Part Three: Commercial examples of managing preferences

In Part Two we went through the case in favour of offering donors preferences, how it can reap benefits for your ongoing relationship and – as part of a donor-focussed charity strategy – can improve lifetime value.

Be in it for the long haul

It's best to view preferences as something of a moving target. People may well state their choices at specific points in time – when signing up, for example - but it's best to look at the process cumulatively.

Think of it as layering donor information over time. You don't learn everything about a person on the first date. You meet a second time, then a third time. And gradually build up a picture of that person – what they believe in, what interests them, how they like to be treated.

The same principle applies for preferences. In the technical speak of 'preference centres' – a tool that helps you to capture digital preferences – this drip-by-drip approach is called 'progressive profiling'. This approach was largely pioneered by the 'marketing platform' *Silverpop* - a system that captures information about the customer from multiple touchpoints to help tailor a more personalised experience.

As Loren McDonald from *Silverpop* explains, "It gives you multiple chances to build that trust and show them the quality of content they can expect from you."

The visual below, taken from Rogare's *Relationship Fundraising* research, shows the difference this approach can make to your business, moving from a transactional mindset to a relationship-driven one:

	Transactional	Relational
Focus	Single sales	Customer retention
Key measures	Immediate ROI, revenue, response rate	Lifetime value
Timescale	Short-term	Long-term
Orientation	Purchase	Relationship
Customer service	Little emphasis	Major Emphasis

Getting the technical support you need

We, as a sector have much we can learn from the excellent work *Silverpop* and other preference centre champions have implemented in recent years. Whilst the examples we will look through in this section refer largely to email, the approaches translate across all channels.

As charities, we need to be looking at preferences and choices across every touch-point – offline and on. It is beyond the remit of this project to detail the ins and outs of the technical setup required to enable this type of data collection but our section on 'Recommended Vendors' gives options for one-man band charities through to nationally recognised organisations to get the technical support needed.

As this section demonstrates, it is the principle that matters. How donors are managed can be as simple as an Excel spreadsheet manually inputted. What matters is the experience of being listened to and having the request recognised. The scale of preferences and choices you offer will naturally vary based on what is feasible for each charity to manage. Indeed, an email address or telephone number to a human being at a charity is enough to provide trust and reassurance to a donor.

If they wish to change their communication relationship with you, you must ensure there is an easy and straightforward way for them to do so. Anything above and beyond that in terms of technical complexity is a plus, not a necessity.

In the examples that follow, pay particular attention to they ways these preferences are presented: see how they appeal to audience motivations and how they also aim to make the process easy to do.

Let's start by looking at the different touch-points where people are likely to provide you with their preferences.

Where and when are preferences captured?

At the start of the relationship
When signing up. In addition to collecting basic contact details, you may choose to offer different content up front (e.g. newsletter vs. promotions), or levels of frequency (e.g. weekly vs. monthly vs. annually). These are the options people will choose based on the expectations you set in your offering; they have yet to experience what it may be like on the receiving end of your materials.

During the relationship
At any point along the journey they may click through to their preferences page and update their details. Perhaps they have changed address. If a commercial customer, perhaps they no longer wish to receive your daily deals, just the monthly offers. Something in their circumstances will have shifted and, in turn, they wish to adjust the communications relationship with you to reflect that.

At the end of the relationship
Perhaps you've been spamming them and they've gone to unsubscribe (64 per cent of consumers opt-out due to receiving email too frequently, as reported online by *Marketing Sherpa*). Perhaps they have moved into a different lifestage and your product or service is no longer relevant to them. Whatever the reason, you will come to the end of the road with some people. When they come to unsubscribe, some may leave a comment to tell you why. But for many, they already have one foot out the door. You simply have to make it quick and simple for them to say farewell.

As we discussed in Part Two, preferences are just one part of the bigger picture concerning supporter data and how you can be more relevant to your supporter base. Richard Evans from *Silverpop* summarises this neatly in the visual below:

3 forms of data that drive dialogue

Inferred – What we learn by listening
Implicit – What we learn by monitoring
Explicit – What we learn by asking

It gives consumers control.
A preference centre empowers your customer by giving them control to only receive the right messages about content/brands that they are interested in at their preferred times.

It helps you understand your subscriber's interests and needs.
Allow your customers to share and continually update their information for you.

It allows you to have a customised and personalised relationship.
Target your marketing efforts where your customers are interested, and build that one-on-one relationship with them. Make them feel valued.

It allows you to control opt-out.
It is more cost-effective to retain customers by allowing them to determine how often they want to hear from you rather than letting them opt-out entirely and then spending the time and resources to replace them.

What does this teach us?

Contrary to where we might typically start to think about preferences (at the start of a relationship), we actually need to be several steps ahead of the supporter. We need to start from the end and work backwards. Ask yourself, what does the end look like?

Offering the right match of choices for people to select is how you, eventually, can make sure fewer people leave you. You have the best possible chance of staying relevant when people have continuous opportunities to tinker with their preferences as their needs and circumstances evolve over time.

But what if you are a small charity? What if you don't have a set of choices as long as your arm to offer supporters? You might be a one-man or woman band fundraiser with limited tech. Does that mean all this talk of preferences doesn't apply to you?

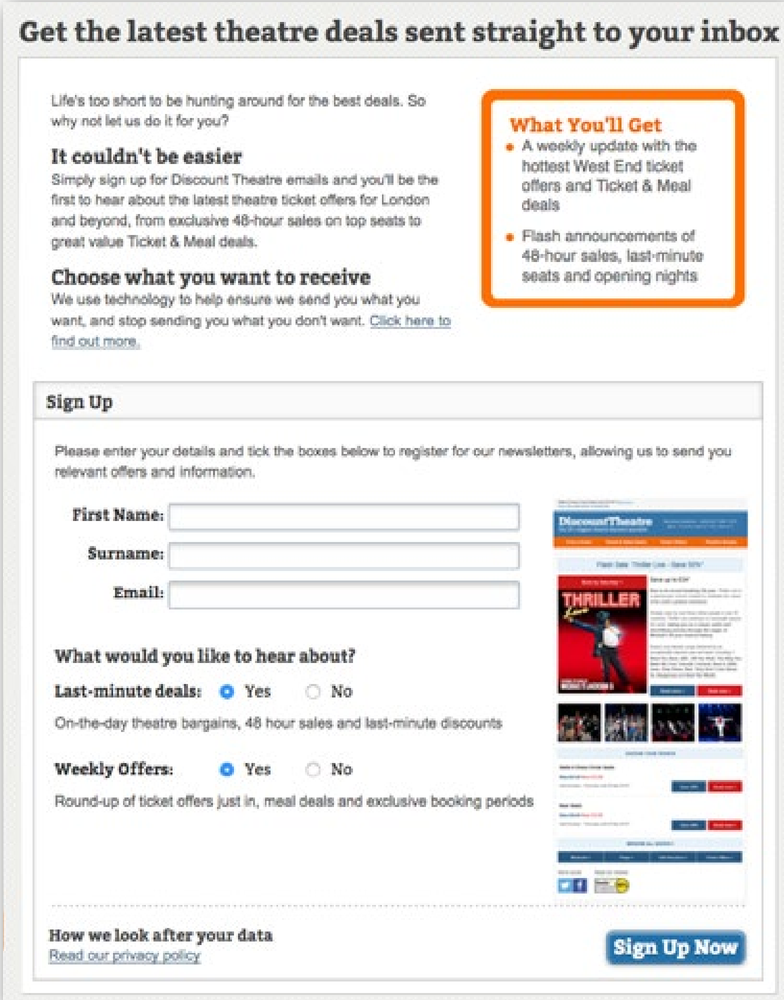
Absolutely not. Because preferences are not about the tech, they are about the principle. The principle of listening. Providing donors with a way to feedback. If that means penning a personal email to an individual at the charity then so be it. A simple operation like this is as valid as the most sophisticated form of automated profiling and data-driven communications.

What matters is that you are showing donors that how they feel and the choices they make matter. And that what they feedback will be taken on board and responded to. Donors simply want to be heard. You must meet whatever expectations you set and be true to what you have promised to do.

That is critical to any kind of data exchange – "growth through trust", as referred to by consultancy Ctrl Shift. And with the new General Data Protection Regulation (GDPR) due to come into effect in May 2018, the use of personal data will more strictly regulated, and how we manage and use our donors' data will become even more important.

Let's take a look at a preference centre example

This example by *DiscountTheatre.com* wouldn't win any DMA awards for creativity. But it does make a good fist of addressing customer **motivation** and **ease**, the two requirements to spur potential audiences to action.



The headline.
Offers a 'self-interest' benefit. You don't need to go browsing for the offers, we'll send them straight to you as soon as they are out. We'll do that leg-work, you just need to fill in some basic contact details.

Introductory copy.
Expands further on the key benefit, by starting where the potential customer is at - their motivations. They'd like deals but life is too short to be hunting around for the best ones. Fear not, we do that for you and send them on directly. Not only that, if you tell us a little bit more about what you would like to receive, you'll get the most relevant offers to you.

What you'll get.
Here they are setting out their stall. The prospect knows they are signing up for offers. But there's an element of risk here. Can they trust you? What if this turns into an unwanted irritation, with emails relentlessly cluttering up your inbox every day?

Instead, it's really specific – one update a week and any flash offers that come in. This is a smart decision because it sets out the structure of the email relationship, but still allows the company to send ad-hoc messages with additional content that is relevant and beyond the usual tranche of communications.

Contact fields.
Note how only three details are requested. Name (in order to personalise 'Dear AB Sample'), and email address. If these communications lead to a sale, address details and the like will be populated in time. Or a progressive approach to the data capture could be taken, gradually adding details cumulatively during future interactions. But customers will evaluate how much data they give (and how much effort you are asking of them at a point in time), based on what it's worth to them. No one will fill in a page and half of fields to get a ticket newsletter; a bank loan on the other hand is a different matter.

What would you like to hear about?
Too often this type of question is framed from a company's perspective, particularly where charities are concerned. You more commonly see 'Would you like us to… May we get in touch with you about etc…'? Remember, it's not about you, it's about them and the cause. You are merely the conduit. And in this example, there are two simple Yes/No options regarding content and frequency.

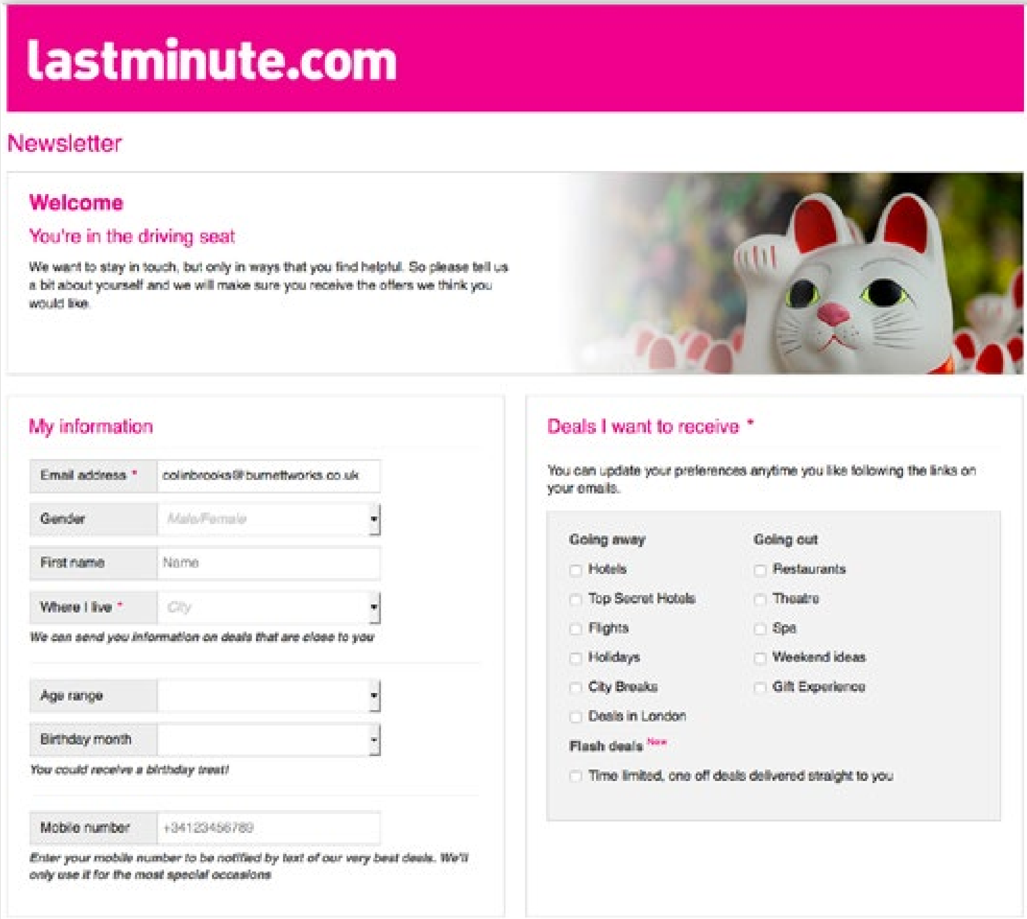
Example email.
A direct marketing approach as old as the hills. Don't tell me, show me. Get me excited about what you are going to add to my life simply by giving you these few bits of my data. This is where emotion gets in (for those who, like the authors, grew up on the 'Attention, Interest, Desire, Conviction, Action' - or 'AIDCA' - model, this is the 'conviction' step in the process). But in the case of this product – theatre experiences – it's also a chance to engage the emotions. Help me imagine myself already signed up to a email relationship with you. Give me a taster of what that will be like. It's the principle of sales promotion in action: try before you buy.

How we look after your data.
Further reassurance that you are engaging with a trustworthy organisation (note also the nice detail in the example email, where a very positive Feefo customer satisfaction score is proudly displayed). This website is not a household name. Unsure users will want to know what they are letting their data in for.

The call to action
You are not asked to 'Submit'. Your audiences are not computers. They are joining something. You are inviting them to something. And, in the tiniest and most subliminal of ways, adding 'Now' at the end adds a notch of urgency. Their decision could go either way at this critical moment. Cue them to take a positive action and become one of your prospects.

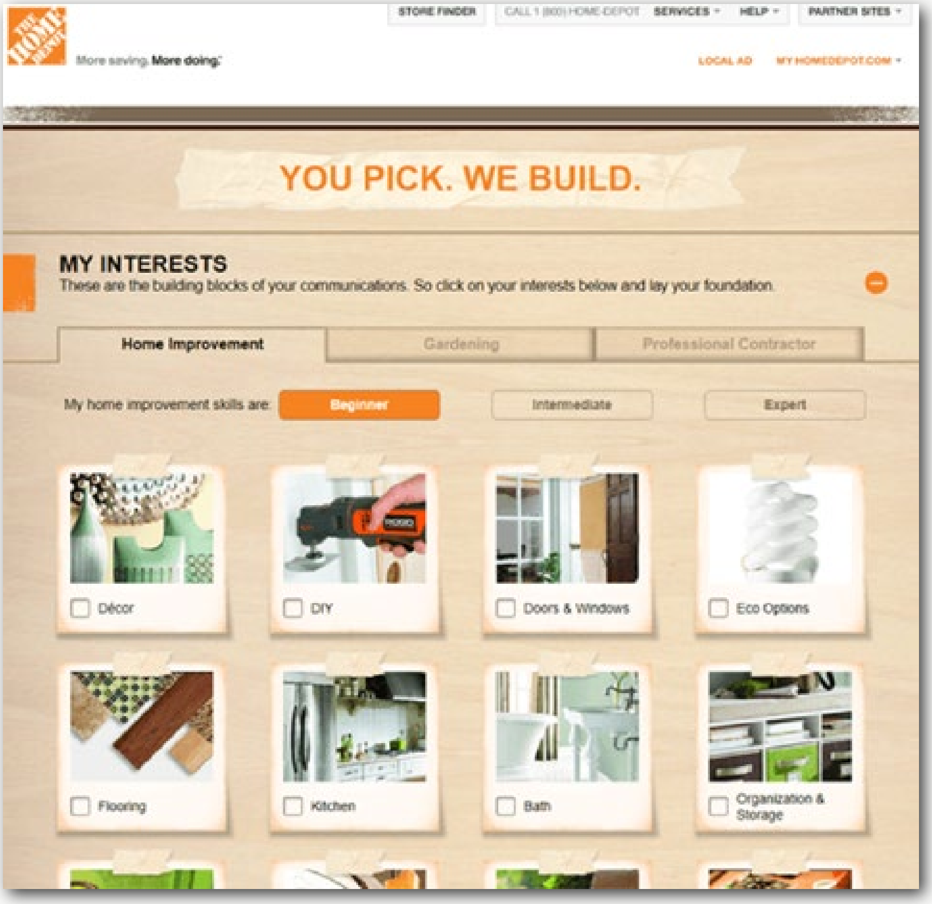
Here are five other good examples to learn from

Example 1: At the start of a relationship
This is another well structured way to start your relationship on the right foot, by setting expectations from the get-go and helping your audience understand how each piece of data will be used to fine-tune how you interact with them:



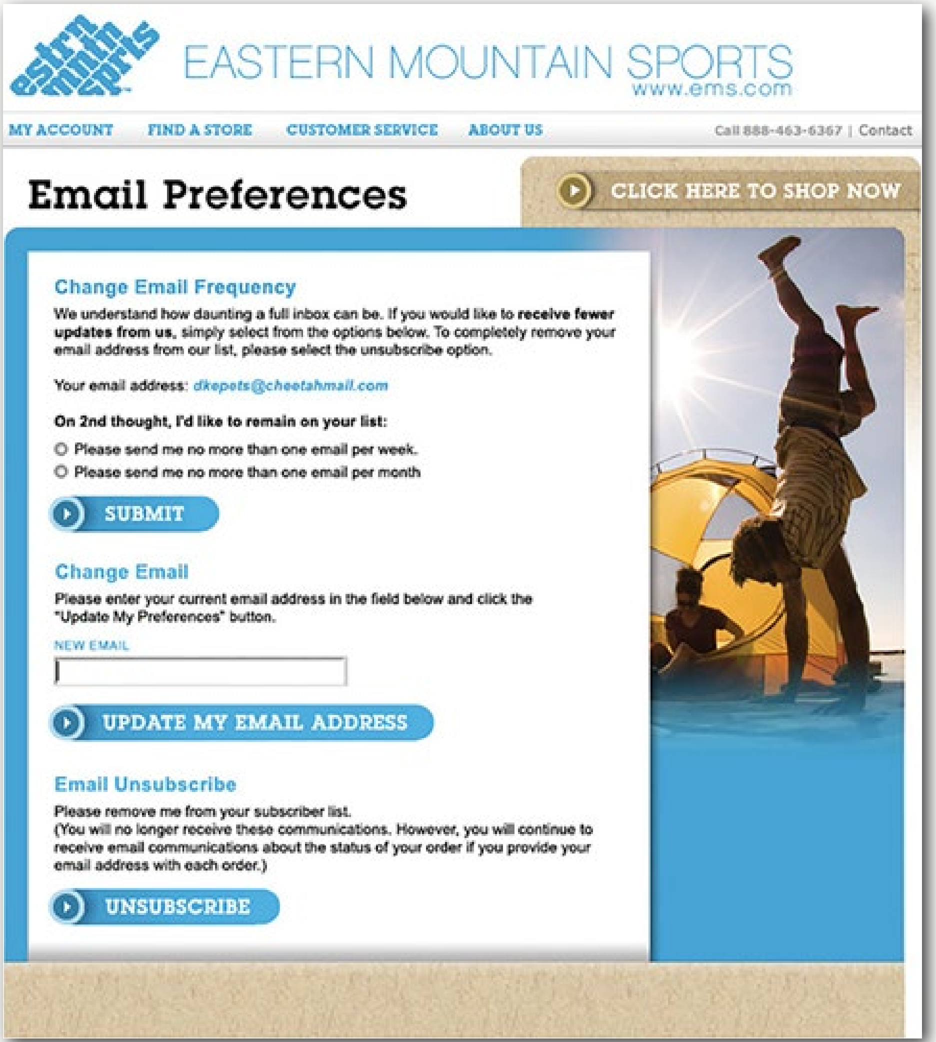
Example 2: Make it interesting
This example by *DiscountTheatre.com* wouldn't win any DMA awards for creativity. But it does make a good fist of addressing customer **motivation** and **ease**, the two requirements to spur potential audiences to action.

When we talk about preferences, choices, control and all things data, it can be easy to think such things need to be dry and dull. Just extra fields on a form. But check out this lovely, visual approach to capturing interests from *The Home Depot*:

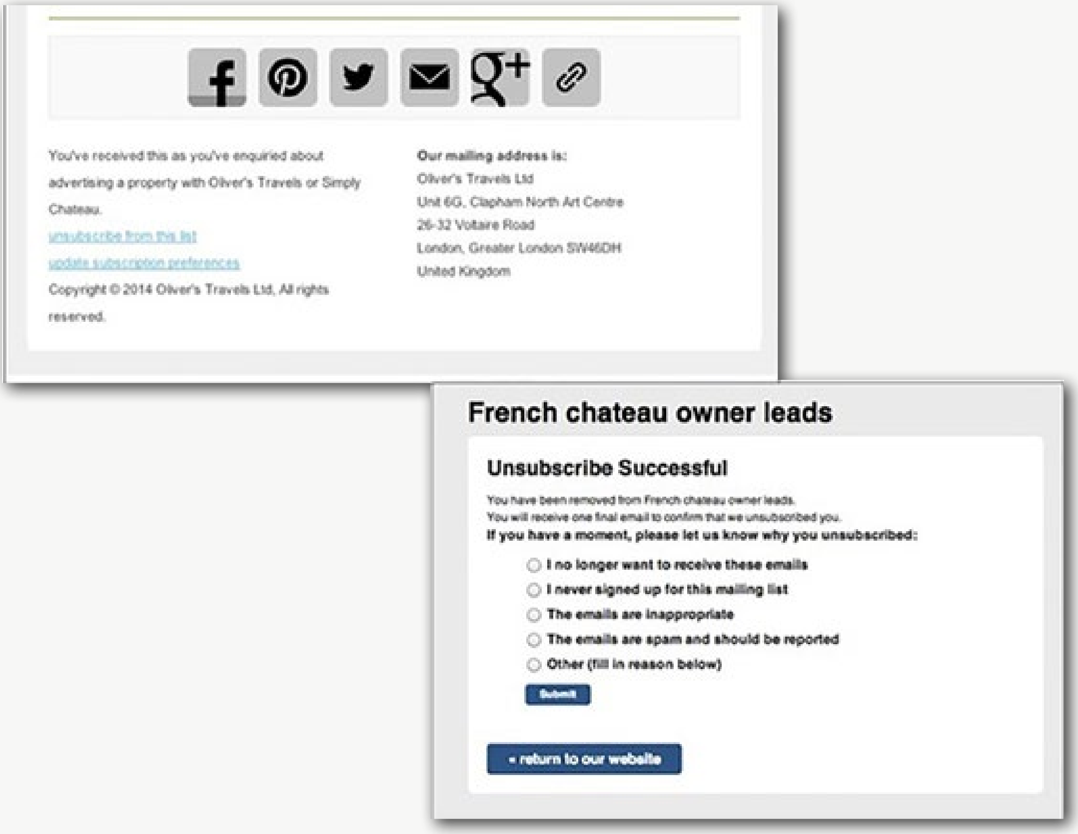


Example 3: During the relationship

This is a a well laid out preference page, created by Experian, that subscribers can click through to from any email they receive from *Eastern Mountain Sports*. From this page they can change how often they receive messages, update their data (excellent for cleansing your database) and even call time on the messages entirely:

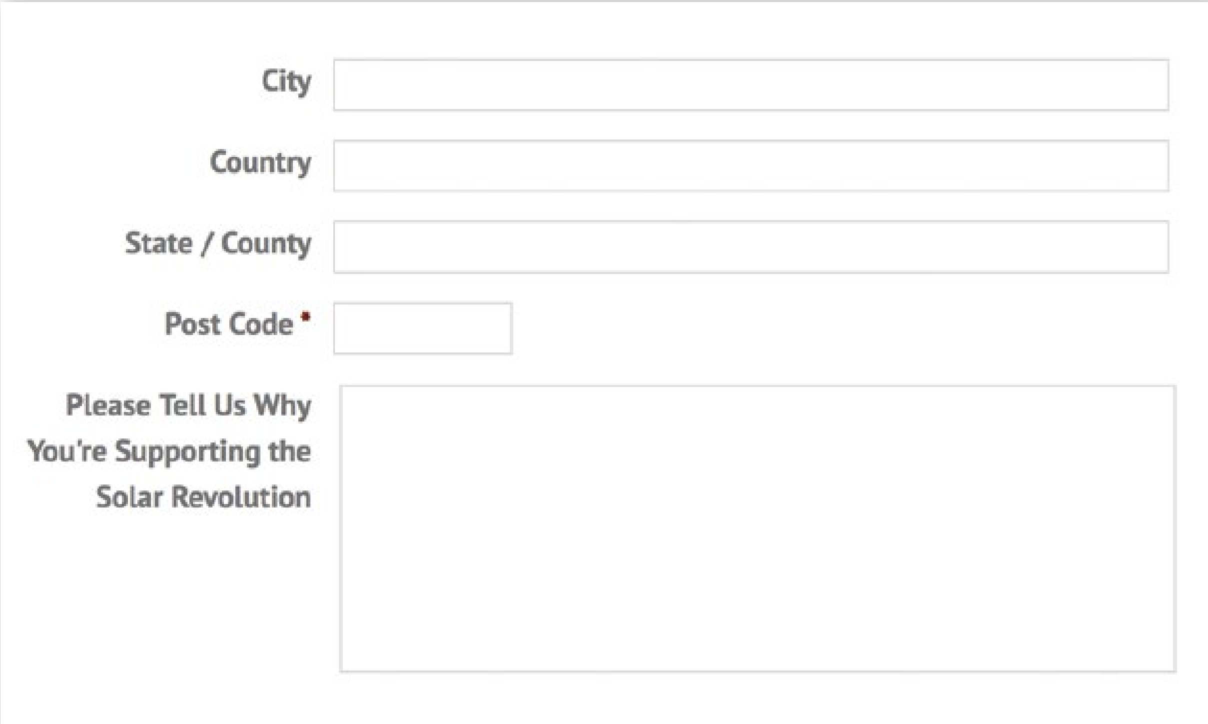


Example 4: At the end of the relationship
Here's a good way to capture feedback on why people may choose not to let you stay in touch. You should keep a close eye on these stats. If, as many find, email frequency or message irrelevance keep coming out on top, you know you have more homework to do.:



(Source: Econsultancy)

Example 5: And finally, a lovely extra touch…


City

Country

State / County

Post Code *

Please Tell Us Why You're Supporting the Solar Revolution

When you sign up via the charity *Solar Aid*, on top of filling in your contact details you are asked one question: "Please tell us why you're supporting the solar revolution". The response is an open field.

Richard Turner, former head of fundraising at the charity, used to collate the text answers in this field and regularly send them round to senior management (a mark of a truly donor-led charity culture).

Why? Because connection to the cause matters. It's a very personal thing. We need to understand why people are engaging with us, not just what they are requesting.

If someone is donating to a Parkinson's charity because they have a parent who has recently been diagnosed, your next interaction with them will need to be very different from someone who has simply added you to their basket of good causes.

One may need help and support information, the other may be someone you can invite to volunteer. A 'one size fits all' letter or email appeal will not suffice. Charities in future must listen, be sensitive and be relevant. This is what well framed choices and benefit-driven preferences can add to the donor experience.

Conclusion

In this section we have surveyed how commercial organisations have been using preference centres as a means of putting customers in control of the data they give, the communications they receive and the closeness of relationship they are happy to have.

The principles on display here are entirely relevant to the charity sector, even more so as we trade in causes that people care passionately about. Sensitivity to such preferences – and coming good on the expectations we set – is paramount.

Part Four: What can charities teach us about managing preferences?

Charity case study 1: Botton Village and Camphill Village Trust

The history - how did Botton Village start fundraising?
Botton Village began fundraising in 1983. As a residential Camphill community in North Yorkshire, where adults with learning disabilities lived and worked alongside co-workers, together creating a vibrant community that benefitted all, they were short of money.

They needed funds to help to improve existing homes and workshops, and develop the village further. Income in the form of grants for those with learning disabilities, and some income from the village's own products that they created and sold, was not enough.

They had a real need for extra money to fund investment – but they did not know where to turn.

It was this situation of need, and the chance attendance of co-worker Lawrence Stroud at a fundraising conference where he met Ken Burnett, that led to Botton's fundraising programme being born – in a community with no fundraising knowledge, experience or culture, and no fundraising staff.

What drove Botton Village's approach?
Starting from zero meant that Botton Village defined its own approach from the start. As a place where co-workers had chosen to go to live, to share their lives with adults with learning disabilities, everyone's focus was very much on life within the village. People were nervous, and even suspicious of fundraising – contacting people they had never met, openly asking for money for a place those unknown people knew nothing about.

Against a background of bafflement, nervousness, and some outright hostility (as well as some hope!), the first cold direct mail appeal was developed. It was a surprising success.

It was also a learning experience – and became the first small step along a long journey of trial and discovery, as Botton Village gradually evolved its own unique approach to how to reach out to donors as friends, and how to raise money by bringing donors as close as possible to the real individuals (people portrayed as having their own special abilities, rather than disabilities) who they were supporting.

This reticence to fundraise, together with a view of 'Why on earth would anyone support us?' gave fundraising its own strong ethos from the very start.

What did this mean for fundraising?
No principles were written down, but if they had been, they might have been roughly as follows:

1. If we're going to ask people we don't know to support us, we'll ask them, very respectfully, to be friends of our community.

2. If we're going to fundraise for the people who live here, we need to share how this rich mix of people, each with their own special talents, qualities and abilities, achieve amazing things in their lives (despite how other parts of society might view or treat them). We'll help them to speak for themselves, and tell these new friends why Botton Village matters to them.

3. We will share our needs openly and honestly, and only ask for what we need. We will share the good news of what has been made possible with the help of these friends.

4. We'll respect these people who are becoming our friends. We won't use jargon. We won't be pushy. We won't hassle them or use types of fundraising some say they don't like. We will listen to what they say. We will try our best not to do anything to harm this amazing bond with kind friends most of whom we have never met.

5. We will ask them to visit the Village if they would like to, and try to give them a good experience. We will encourage them to get in touch with us whenever they have a question.

6. Each one of these friends matters. The lady who manages to give us £10 from her pension is just as important as the person who is more easily able to give a much larger gift.

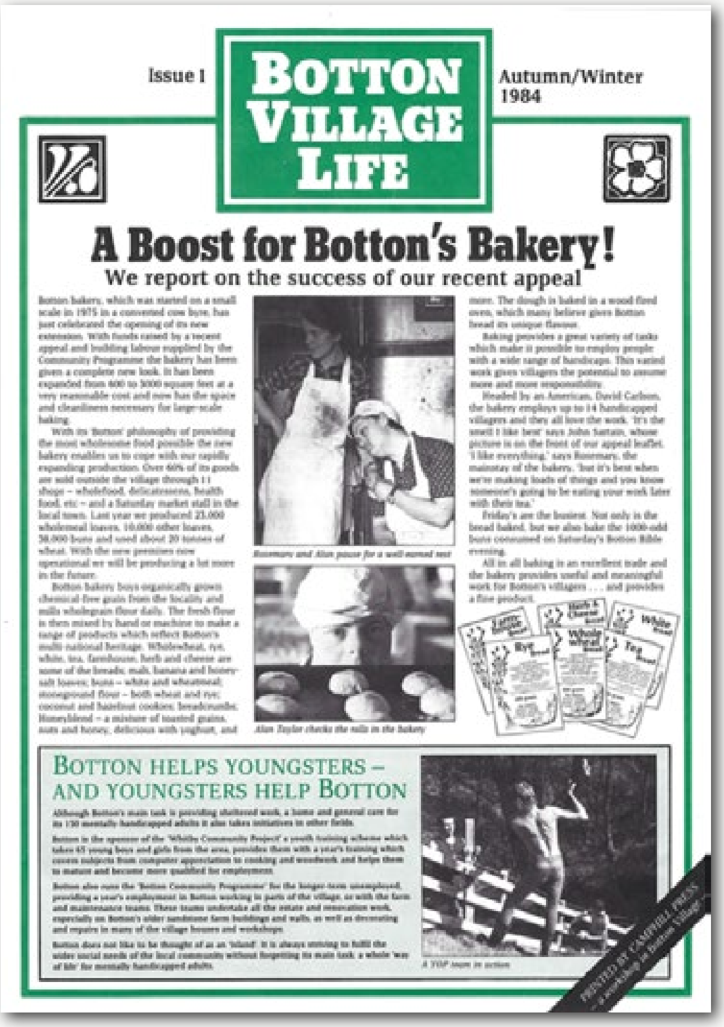
7. Some people don't want to hear from us too much, or even at all – so we'll be clear about the sort of communication we'd like to have with them. We will give them choices about what they would like to receive, and how often. They will always be free to change those choices. We'll trust that if they want to stay with us, they will.

How was this approach implemented?
This approach led to a programme as follows:

A newsletter was developed: 'Botton Village Life' to introduce the people of the village and their lives, share the ethos behind the community, build a deeper understanding, and feedback on what was achieved. It was felt to be important that the newsletter did not ask for money.

Separate appeals were created around specific projects needing funds, and these were sent with the newsletters.

A warm, chatty letter spoke to donors as friends, sharing needs gently, and in a friendly way. The letter always came from the same person, so that the donor knew what to expect and got to know a particular representative of the community.



Issue 1

BOTTON VILLAGE LIFE

Autumn/Winter 1984

A Boost for Botton's Bakery!

We report on the success of our recent appeal

Botton bakery, which was started on a small scale in 1975 in a converted cow byre, has just celebrated the opening of its new extension. With funds raised by a recent appeal and building labour supplied by the Community Programme the bakery has been given a complete new look. It has been expanded from 400 to 3000 square feet at a very reasonable cost and now has the space and cleanliness necessary for large-scale baking.

With its 'Botton' philosophy of providing the most wholesome food possible the new bakery enables us to cope with our rapidly expanding production. Over 60% of its goods are sold outside the village through 11 shops – wholefood, delicatessens, health food, etc – and a Saturday market stall in the local town. Last year we produced 23,000 wholemeal loaves, 10,000 other loaves, 38,000 buns and used about 20 tonnes of wheat. With the new premises now operational we will be producing a lot more in the future.

Botton bakery buys organically grown chemical-free grain from the locality and mills wholegrain flour daily. The fresh flour is then mixed by hand or machine to make a range of products which reflect Botton's multi-national heritage. Wholewheat, rye, white, tea, farmhouse, herb and cheese are some of the breads; malt, banana and honey-salt loaves; buns – white and wheatmeal; stoneground flour – both wheat and rye; coconut and hazelnut cookies; breadcrumbs; Honeyblend – a mixture of toasted grains, nuts and honey, delicious with yoghurt, and more. The dough is baked in a wood fired oven, which many believe gives Botton bread its unique flavour.

Baking provides a great variety of tasks which make it possible to employ people with a wide range of handicaps. This varied work gives villagers the potential to assume more and more responsibility.

Headed by an American, David Carlson, the bakery employs up to 14 handicapped villagers and they all love the work. 'It's the smell I like best' says John Sattain, whose picture is on the front of our appeal leaflet. 'I like everything,' says Rosemary, the mainstay of the bakery, 'but it's best when we're making loads of things and you know someone's going to be eating your work later with their tea.'

Friday's are the busiest. Not only is the bread baked, but we also bake the 1000-odd buns consumed on Saturday's Botton Bible evening.

All in all baking is an excellent trade and the bakery provides useful and meaningful work for Botton's villagers . . . and provides a fine product.

Rosemary and Alan pause for a well earned rest

Alan Taylor checks the rolls in the bakery

BOTTON HELPS YOUNGSTERS – AND YOUNGSTERS HELP BOTTON

Although Botton's main task is providing sheltered work, a home and general care for its 130 mentally handicapped adults it also takes initiatives in other fields.

Botton is the sponsor of the 'Whitby Community Project' a youth training scheme which takes 45 young boys and girls from the area, provides them with a year's training which covers subjects from computer appreciation to cooking and woodwork and helps them to mature and become more qualified for employment.

Botton also runs the 'Botton Community Programme' for the longer-term unemployed, providing a year's employment in Botton working in parts of the village, as with the farm and maintenance teams. These teams undertake all the estate and renovation work, especially on Botton's older sandstone farm buildings and walls, as well as decorating and repairs in many of the village houses and workshops.

Botton does not like to be thought of as an 'island'. It is always striving to fulfil the wider social needs of the local community without forgetting its main task, a whole 'way of life' for mentally handicapped adults.

A YTP team in action

PRINTED BY CAMPHILL PRESS a workshop in Botton Village

What did this mean for donor choice?
As the fundraising grew, a small office team developed to help create the fundraising communications, look after donors and bank their donations. A fundraising group was developed to lead the fundraising: made up of some co-workers, some of the small office team, and agency Burnett Associates (now Burnett Works).

Feedback from some donors led the group to realise that some people wanted less contact. Analysis of donors' donation history showed that though donors received four or five appeals each year, some appeared to consciously decide to give just once each year. Some said they wanted information, but not actual appeals. Some did not want to hear from Botton Village again, perhaps having given just once for their own reasons.

So a page called 'How Botton Village can help you' developed. It was placed on the reverse of the reply form, and included in every mailing: as a place where Botton Village thought about what you, the donor, might like: how to make you feel as comfortable as possible, encourage you to get in touch by calling the office, offer you more different information or the chance to visit – or to express your communication preferences.

Each donor could choose:

- To receive information but no appeals for funds
- To receive all four regular communications per year
- To hear just once a year, at Christmas
- To move back from just once a year at Christmas to all four mailings
- Not to hear from Botton Village again.

Was offering donors choice tested?
Botton Village offered its donors the chance to express their communication preferences from very early on.

It was not tested against a 'control' group who were not offered these choices – because for Botton, it was about respecting this remarkable group of unknown and generous friends, and treating them as the Botton team felt they themselves would wish to be treated. For them, this came above maximising short-term income for the village.

So, they developed this approach because they believed it was the right thing to do. This strong ethos came first and foremost – and perhaps not surprisingly, other unexpected benefits followed.

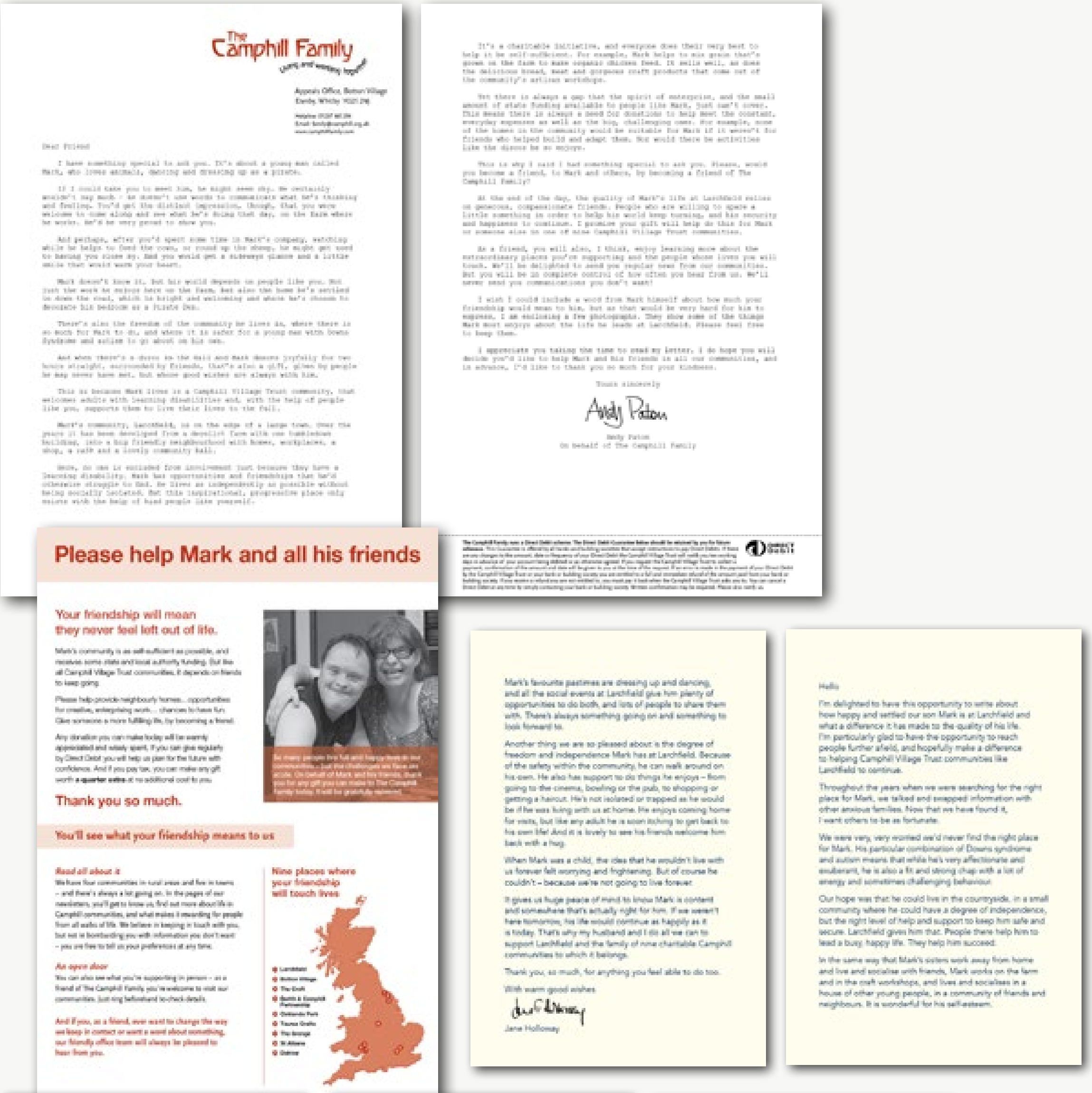
How donors felt about Botton Village
Over time, we became aware that:

- People enjoyed hearing from Botton Village. They read what they were sent, and listened
- People got pleasure from seeing the difference they were able to make
- Donors felt part of Botton, interested in people's lives, looking forward to hearing news, many choosing to make the effort of a long trip to visit the village. As a new cause Botton had always invited donors to come visit, to see first hand what their support was achieving. Initially this was more in hope than anticipation but donors loved it and even those who couldn't come felt happy to be invited. before long a villager was given a job - full-time - of looking after a steady flow of visitors, each of whom became a friend for life
- People trusted the charity
- People felt loyal and committed to Botton Village
- Many were prepared to stand up and take action if they felt Botton needed support
- Many continued to give for many years
- Some introduced their company, or trust; or offered to raise money for Botton through their own fundraising efforts; or offered gifts in kind – and continued to give in these different ways
- Many went on to leave a legacy.

How has this evolved and developed over time?
Over the years, through direct marketing campaigns, a large and loyal group of donors was recruited. Botton Village felt that after 18 years of fundraising it had largely met its immediate needs, and the programme began a careful plan of transition. Gradually supporters were introduced to other Camphill Village Trust

(CVT) communities ('Botton's wider family'), in order to fundraise for the whole of CVT – then 11 different communities across the UK. The last mailing from Botton Village reached donors in June 2002 – and since then, The Camphill Family has been the fundraising vehicle for the whole of the Camphill Village Trust.
When Botton Village fundraising became The Camphill Family, almost all donors chose to make the step to support the new family of communities. Appeals shared, and continue to share the needs of one or more projects or communities at a time.

Making a promise at the very start
In all of its donor recruitment communications, CVT makes it clear that it is seeking friends. Friends who will be sent news and updates, invited closer if they choose, but friends who will be given control of what they receive, and whose wishes will always be respected.



Please help Mark and all his friends

Your friendship will mean they never feel left out of life.

Mark's community is as self-sufficient as possible, and receives some state and local authority funding. But like all Camphill Village Trust communities, it depends on friends to keep going.

Please help provide neighbourly homes…opportunities for creative, enterprising work… chances to have fun. Give someone a more fulfilling life, by becoming a friend.

Any donation you can make today will be warmly appreciated and wisely spent. If you can give regularly by Direct Debit you will help us plan for the future with confidence. And if you pay tax, you can make any gift worth **a quarter extra** at no additional cost to you.

Thank you so much.

So many people live full and happy lives in our communities – but the challenges we face are acute. On behalf of Mark and his friends, thank you for any gift you can make to The Camphill Family today. It will be gratefully received.

You'll see what your friendship means to us

Read all about it

We have four communities in rural areas and five in towns – and there's always a lot going on. In the pages of our newsletters, you'll get to know us, find out more about life in Camphill communities, and what makes it rewarding for people from all walks of life. We believe in keeping in touch with you, but not in bombarding you with information you don't want – you are free to tell us your preferences at any time.

An open door

You can also see what you're supporting in person – as a friend of The Camphill Family, you're welcome to visit our communities. Just ring beforehand to check details.

And if you, as a friend, ever want to change the way we keep in contact or want a word about something, our friendly office team will always be pleased to hear from you.

Nine places where your friendship will touch lives

Donors continue to be offered choices in every mailing from the charity:
CVT keeps in touch with donors primarily via four mailed communications per year, which enclose a newsletter, a leaflet showing a project in need of support, a letter, and reply form. On the reverse of the reply form, entitled 'Let The Camphill Family help you', donors continue to be offered a range of choices, as follows:

- To receive information only, but not appeals
- To receive all four regular communications per year
- To hear from CVT just once a year, at Christmas
- If they have chosen this option, to revert to receiving all four mailings
- To receive information and appeals by email
- Not to hear anything from CVT again

Donors are also offered the chance to find out more, plan a visit, or get in touch with one of the office team with any query you may have.

The Camphill Family

Urgent message – Please respond today – It'll only take a minute
Yes, I'll help create the space people need at Ashfield
I'd like to make a donation today
I'd prefer to give by Direct Debit
If you are a UK taxpayer, please sign below!

Camphill Family Life
Where our willow grows
'I like the friendliness'
Love receiving our news?

Space to be ourselves and grow

Your gift will help us be ourselves and grow – so please let us help you too.

Some of our residents and team at Ashfield House.

Let The Camphill Family help you

Your support means a great deal to us and we want to help you in return. Please let us know your preferences by ticking the relevant boxes below.

Choose when you want to hear from us

1. If you receive four issues of our newsletter each year:
   - ☐ *I would prefer to hear from you just once a year, at Christmas.*
2. If you receive a newsletter once a year only, you may like us to contact you more often:
   - ☐ *I would like to receive Camphill Family Life four times a year.*
3. If you would rather not receive appeals:
   - ☐ *I would like you to keep me up to date with news through Camphill Family Life, but I do not wish to receive appeals.*
4. If you would rather not receive any further information from The Camphill Family:
   - ☐ *I would prefer you not to write to me again.*

To set up or change a regular gift

Giving The Camphill Family your regular financial support helps us to plan for the future. By amending an existing Banker's Order or setting up a Direct Debit you'll continue giving our communities regular help, but your bank will be doing all the paperwork.

- *To set up or amend a Direct Debit please complete the form overleaf or online at www.camphillfamily.com. If you wish to convert from Standing Order to Direct Debit, please complete the form and remember to contact your Bank to cancel the existing Standing Order instruction.*

Leave a gift of happiness in your Will

Remembering The Camphill Family in your Will would bring happiness to people in our special communities, many years into the future. We'd be delighted to send you more information about this way to give.

☐ *Please send me a free copy of the legacy information leaflet.*

Order your guide to The Camphill Family

This guide gives you all the information you need to plan a visit, including our opening times.

☐ *Please send me a free copy of the guide.*

Buy Camphill Products online

To see and buy greetings cards, stationery, dolls, wooden toys and other products please visit us at **www.shoppingcamphillpress.co.uk**

Nine places where your friendship changes lives

1. Larchfield
2. Botton Village
3. The Croft
4. Berith & Camphill Partnership
5. Oaklands Park
6. Taurus Crafts
7. The Grange
8. St Albans
9. Delrow

Do you want a word with someone?

Our office team of Sue, Fran, Ann, Maureen and Jackie is here to help you.

Just ring our helpline 01287 661294 or our switchboard 01287 660871, 9am to 4pm weekdays, and one of us will be pleased to talk to you.

What are the results?

CVT's results are remarkable, and donors show great generosity and great loyalty.

- Of a current total of 58,000 donors - 30,744 (53 per cent) have chosen to hear just once at Christmas. Response rates in these Christmas segments reach up to 59 per cent, with an average gift of nearly £68 across the mailing. Response rates in these segments are considerably higher than in comparable segments of people happy to hear four times per year.
- 4,400 donors have chosen just to receive information only. They receive the newsletter and details of the current appeal, but no direct appeal for money is made, and no reply form is sent. Yet the two main segments of information donors still give at between 26 per cent and 39 per cent.
- Together these 58,000 donors give over £3 million pa.
- The average lifetime value (without legacies) of all donors still actively giving is £948. The average lifetime value of all lapsed donors is £215 per donor. The average donor gives for over 9 years but many give for much, much longer.
- In the last 4 years, legacies traceable to donors have ranged from £1.38 to £1.93 million per year - making up between 56 per cent and 83 per cent of all legacies received by the charity.

How do donors feel about being offered choices?

Recent qualitative telephone research confirmed how much supporters enjoy supporting the Camphill Village Trust. They commented on the quality of the information they received, and how it made them feel closer to the people they help to support.

They marked out CVT as a charity they trust not to take advantage of their goodwill – in sharp contrast to feeling utterly taken for granted by and fed up with the approach they feel they get from so many charities they support. Some comments follow:

'With Camphill I never feel pestered. It feels utterly appropriate. They ask when the need arises. It's important.'

Supporters are aware of the communications options given to them by CVT (to receive communications quarterly, or just once a year at Christmas, or to receive information but not appeals, or not to hear further at all). They appreciate the sense of control this gives them, even if they do not choose to exercise any of the choices.

'I've noticed that I can tick a box about when I want to get the letters etc, but I don't fill it in as I don't need any changes. I'm happy to get it four times a year. I know I can tick it but I don't want to. I do think it's helpful to be given the choice.'

'I like the fact that you asked me how I wanted to be contacted. I do one donation a year at Christmas. I was asked and you never contact me at any other time. You contact me at Christmas. I do my donation. I haven't got time to read a whole load of stuff all the time and I don't want to get things through the letterbox on a daily basis. Camphill did what I asked and I'm really impressed.'

'I think it's a good idea to get the options. I've just emptied out a drawer this week of letters from dozens of charities we've supported and you think, that's a hell of a lot of money wasted on paper. You put the forms in the drawer and you feel guilty about not supporting them. But there's only so many you can do.'

'We're down to once a year now for newsletters and we always give at Christmas. They asked me and that's what I decided I'd do.'

'Camphill, after my request, only send me once a year, which is great for me. But Camphill is the odd one out of all the charities we support.'

'I notice there's something to tick, but I let them come every quarter.'

How does this contrast with what donors too often feel?

This appreciation is in marked contrast to donors' treatment by many charities, which leaves people feel cynical, irritated, and taken for granted. We frequently heard words like annoyed, fed up, cross, guilty, pestered, pushy, aggressive… confirming the damage the sector overall has done to many precious relationships. Here are some of the things people said; notice how many of them voice a feeling of being out of control of how, how often, and with what the charity is choosing to contact them.

'I do support other charities. I find others quite pushy. They cotton on to you that you're prepared to give to charity and they don't let go. They don't give you the choice. You get things through your letterbox constantly.'

'Giving doesn't stop the begging letters coming in.'

'There's nothing more irritating than having endless requests for money every 2 – 3 weeks. We get quite cross about it.'

'You get on their mailing lists and that's it. XXX are terrible… we get fed up…'

'Within months of setting up the direct debit, I had a very aggressive fundraising call. It was appalling. I didn't stop the direct debit… but it wasn't nice.'

'You get people from call centres and it doesn't matter what you say to them, they just ask the same list of questions…'

'The other thing I don't like is when charities send you free gifts… it puts me off… they don't ask me, they just come…'

'Charity fundraising on the whole is all very soulless… everybody is fighting for the same bit of money…'

It's not just about choice and control

Of course, the success of Botton Village, and the Camphill Village Trust's fundraising programme is not just about the choices that the charity gives its supporters.

These are just one of the ways in which CVT expresses its respect for its donors:

CVT decided long ago **not to use prompt levels on reply forms** because some donors expressed a dislike of feeling they were being 'told what to give'. The voice of a few was enough to cause the charity to believe that many would prefer to be left completely free to choose their amount. This may be controversial, but is a good example of how respect for donors lies at the heart of CVT's fundraising. Average gifts values remain high: in the past year they have varied between £50 and £68.

Though **fundraising by telephone** is understandably popular and, done well, can be used to enhance and develop relationships with donors, CVT decided not to use this channel of communication to fundraise, because they had reason to believe that some supporters would find this too intrusive.

While the opportunity to give regularly is always available, **CVT has preferred not to directly ask donors to convert to a regular gift.** Some donors had expressed a view that they enjoyed giving one-off gifts much more, making individual decisions to give amounts they choose, at times they choose and getting pleasure from each gift. Hearing that from some donors was enough to make the charity feel that donors should not be strongly led to a particular type of giving. Although just occasionally, for example on a major anniversary when looking ahead at longer-term challenges and needs, regular giving is suggested as a way the donor can help the charity to tackle these challenges longer-term. And regular donors continue to top up their giving: between 11 per cent and 18 per cent of committed givers (depending on segment) gave an extra gift on top of their committed gift last Christmas.

The tone and quality of communications aim to bring the donor closer to the people CVT supports, to show people succeeding in their lives, to share challenges, to show opportunities to achieve something tangible and to give feedback and show appreciation of the important part that friends play… these are all marks of a fundraising programme which sets out to build long-term, mutually rewarding friendships; to respect donors and not treat them in a way which may be unwanted or unwelcome.

Camphill Family Life

Issue 58 • Autumn 2016 Published quarterly by The Camphill Family www.camphillfamily.com

Where our willow grows

Marco, Newby and other members of the team.

Our Basketry team at Delrow had a very interesting day out at Wassledine farm in Bedfordshire, seeing where some of our willow comes from.

'I saw some cows', Marco remembers, 'and the willows were beige, orange, white and yellow. It was for our basket-making.'

'It was a very nice day', says Newby. 'We saw where our willow grows – it was a big field. I like all the different colours but my favourite one is white.'

A great opportunity

'We thought it would be a great opportunity for people who work in the Basketry to go and see how this material actually grows', explains Wojciech, Delrow's head basket-maker. 'And meet the farmers, Jane and Guy, who we are working with.'

Guy and Jane have been very supportive; they've helped with the Basketry's running costs by taking some of the finished baskets in part-exchange for their willow.

Natural beauty

Everyone was amazed to see the huge variety of willow growing at Wassledine farm, each with its own distinctive quality and natural beauty.

It was a really fun day out – and Jane and Guy have invited everyone back when it's time to collect more!

'I like the friendliness'

Fiona in action this summer. Inset: Ginny's picked some yummy-looking apples!

The Croft garden was once a quarry. We worked hard to improve and enrich the soil – and now it feeds us with all kinds of vegetables and fruit.

Lots of variety

Fiona and Ginny both enjoy helping the garden grow. 'I like the atmosphere, the people, the friendliness', says Ginny.

Fiona says, 'I like the variety. The thing with the garden is, one day we could be planting indoors, and another day we might be outside.'

From tomatoes to apples

This year we've had bumper crops of everything from tomatoes, lettuce and beans, to peppers and purple sprouting broccoli.

We've also made new friendships, as young people joined us for afternoons of fresh air and activity during the school summer holidays.

Soon, there will be apples to harvest – with plenty to enjoy and share with neighbours when we hold our annual Apple Day.

'You can have food from the garden all year long', says Ginny.

Love receiving our news?

Please let us know you'd like to keep hearing from us, using your enclosed reply form.

In this issue: Emma's life in Botton • The Peace Ambassadors • The Archbishop's visit

CVT has stuck to its principles. It has a small, committed team of people involved in fundraising. This team has remarkable continuity, the know their donors well and are passionate about treating supporters well at every opportunity.

In the face of a challenging environment, the Camphill Village Trust has undergone changes over the past few years, and the process of evolution has not been easy. Throughout these changes, the fundraising team have been as committed to donors as ever.

Case study 2: Hosanna House and Children's Pilgrimage Trust (HCPT)

Background

Hosanna House and Children's Pilgrimage Trust (HCPT) is a 60-year old faith charity. Volunteers take disabled and disadvantaged children and adults for "pilgrimage" holidays in the south of France. The holidays are open to all, regardless of faith, and are life changing for many.

The charity's Head of Fundraising, George Overton, says: 'I learned about the Botton Village/Camphill Village Trust preferences slip some time ago. Ever since I've looked for an opportunity to try something similar.' He felt that the Botton/CVT initiative is acclaimed but seemingly rarely imitated.

The sad death of Olive Cooke in May 2015, and the subsequent media criticism of fundraising, seemed an ideal opportunity to adapt the reply form options for HCPT. The media narrative seemed to be that charity donors wanted (at the very least) an easier way to opt out of, and more choice in, receiving communications. Charities seemed to be resistant to providing it.

HCPT was in an ideal position to oblige, George says, 'Not only because I believe HCPT's supporters are particularly dedicated to the cause. But also because I had no fear in sharing such plans with HCPT's trustees.'

In July 2015 the trustees approved the project, agreeing that the fundraising climate was such that offering donors more choice was essential. This was despite the importance of not damaging the amount of fundraising income received from direct marketing.

How it worked

George continues: 'Just like Botton/CVT, I didn't want to offer donors merely negative choices - I wanted to offer positive choices too. An obvious way of doing this was to offer "Yes" and "No" tickboxes, the former offering to send donors more information, the latter to send less.'

A member of the fundraising team worked with a designer to produce a postcard sized preferences slip with Yes and No columns offering different options. Unnecessary text was kept to a minimum. The reverse of the slip had the donor's contact details on (for ease of response tracking), plus imagery used elsewhere in the mailing. The postcard could be returned in the reply envelope enclosed.

HCPT also adapted its ThankQ fundraising database and mailing schedule to be able to handle the choices being offered, and prepared how to record the responses.

In August 2015 HCPT tested the slip in a split 50/50 raffle mailing to warm supporters. Half of the mailing list received the slip and half didn't. After seeing positive results from the test, they had no worries about including the slip in all direct mail from then onwards, comprising a thrice yearly newsletter, twice yearly appeal, and annual raffle mailing.

Results (after over a year of including the slip in mailings)

The first time the slips were mailed, 3% of people returned them. But after over a year this settled down to 1% on average, of which:

- 39% opt out of hearing from HCPT again (0.04% of those mailed overall)
- The same amount again, 39%, want less contact, but still want to continue hearing from HCPT
- 5% want more contact

Of those wanting more contact, most want to receive the charity's Christmas card brochure.
A handful of people request information about leaving a gift in their will.

Supporters find the blank space on the slips useful to fill in their own messages to the charity. Over a quarter of respondents write something in the space.

Of particular note is the supporter who said "Thank you, these options are appreciated". Also it was telling that another wrote "Please no raffle tickets! Today I received five charity appeals all with raffle tickets!" Imagine what receiving so much charity direct mail every day must feel like.

In the initial 50/50 test of the slips, HCPT found the slips had a negligible (quarter of a percent) impact on response rates overall to the mailing.

Conclusion
George Overton concludes the story: 'Presumably charities don't use such devices because they fear their mailing lists will be decimated. But HCPT's experience is that this is unlikely to be the case – only 0.04% of those receiving the slip opt out. However HCPT's experience is that it unquestionably improves the donor experience - how could it not? After all, shouldn't all fundraising charities be offering preferences to their donors?

'The old-style tick box or email address, offering an opt-out, mentioned in small print, isn't enough anymore in the new fundraising climate we're working in. Offering donors choice, and preferences, is vital.'

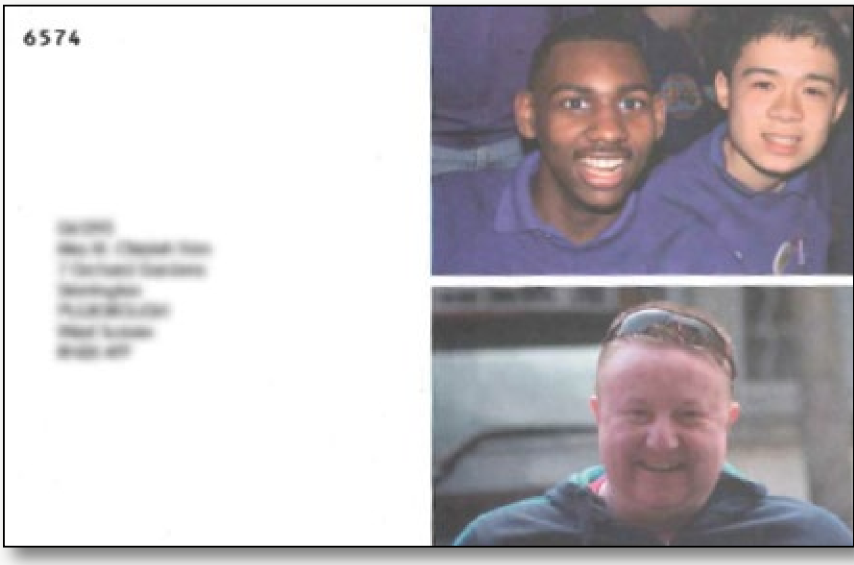
YES
I would like to hear more from HCPT.
Please send me information about:

- ☐ Leaving a gift in my will to HCPT
- ☐ Donating monthly to HCPT
- ☐ HCPT Christmas cards
- ☐ Joining an Easter pilgrimage to Lourdes
- ☐ Joining a Summer pilgrimage to Lourdes
- ☐ Taking my group to HCPT's Hosanna House
- ☐ Self-catering pilgrimages to Lourdes

NO
I would like to hear less from HCPT.
Please do the following:

- ☐ Only contact me by email
- ☐ Only contact me annually
- ☐ Don't send me raffle tickets
- ☐ Don't send me fundraising appeals
- ☐ Don't send me newsletters
- ☐ Don't contact me again at all

Please return to: HCPT, Oakfield Park, 32 Bilton Road, Rugby, Warwickshire CV22 7HQ
HCPT will never share your information with other organisations.



Case study 3: CLIC Sargent

In August 2015, in response to the prevailing climate of negative publicity surrounding charities, CLIC Sargent decide to move proactively to give donors more choice and control.

Up to that point, they had mainly reacted to what donors had asked in terms of choices. But increasingly they had realised that people wanted to engage in the ways that suited them best, in terms of type of communication, channels and devices.

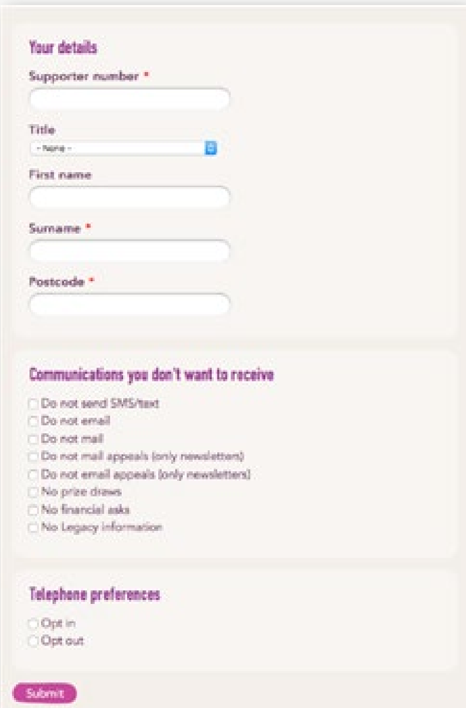
This was seen by the charity as a positive way to be more proactive in giving people more choice and control, and better quality engagement with the charity, and the move was fully supported by senior management and trustees. Any concerns about short-term impact (people choosing not to receive appeals for example) was more than offset by a belief that greater donor satisfaction and loyalty would bring long-term benefit. There was an agreement that it was right to focus on donors' experience, and so to put 'quality' over 'quantity': while the pool of donors each communication reaches might be slightly smaller, unwelcome communication is avoided and response rates and ROI should be improved.

The options are offered on the website, via email, and on phone calls as well as on printed communications including administration letters. Once made they can easily be amended again on an ongoing basis. Since the majority of supporters receive emails, it has been easy to offer these choices to the whole database of 140,000 people.

The team download information from the website weekly and import this to the database, and use the Fast Stats tool, linked to their Care database, to analyse information and make selections. Once the information is recorded on the database, the data team look at how to best select for each communication, to make sure that what is received reflects the donor's wishes.

Since August 2015, 244 supporters have chosen their communication preferences. People comment positively on being asked about what suits them, knowing they can make and amend choices if they wish to, and knowing that the charity is setting out to meet their needs.

CLIC Sargent is pleased to have taken this proactive move to offering more choice and meeting people's preferences, believing that, first and foremost, this is very much the right thing to do; and that by doing so, other benefits of trust, loyalty and long-term value will follow.



Your details

Supporter number *

Title

- None -

First name

Surname *

Postcode *

Communications you don't want to receive

- Do not send SMS/text
- Do not email
- Do not mail
- Do not mail appeals (only newsletters)
- Do not email appeals (only newsletters)
- No prize draws
- No financial asks
- No Legacy information

Telephone preferences

- Opt in
- Opt out

Submit

Case study 4: offering choices through fundraising products

Some charities create fundraising 'products' that enable the donor to develop a more personal sense of connection with the cause they are supporting. At best, these may help the donor to reach into and draw upon their own experience or beliefs, and can foster an emotional connection which helps the donor to support in a way that becomes very personal, and therefore very precious. The choices a donor makes can contribute in important ways to this.

For an organisation such as PLAN International, an individual child is linked to an individual donor and becomes the representative of how a community is being helped. Letters lead to an exchange of details about each other's lives, and a very real sense of what is being achieved. This personal and individual connection is supported by other information which reinforces how the charity is creating change across many communities and countries. These links can last for many years, with sponsors often going on to support a number of children in succession, creating valuable long-term relationships between the donor and the charity.

Developing and offering more tailored products can be another powerful way to offer choice, help people to express their preferences, and tailor feedback to them.

Canal and River Trust

The Canal & River Trust offers supporters the chance to 'Love My Stretch'. For a sponsorship amount of at least £30, supporters can choose an area of canal or river to support for a year. Supporters can share an image and words on the charity's website, allowing them to express what that particular place means to them… or give it as a gift to a friend or loved one with a connection to that bit of waterway. In doing so, you join a community of waterway lovers sharing their own personal images and words, creating a patchwork of people caring passionately about these beautiful places.

Talking to boaters, people out and about on the towpaths, at open days and museums, it became clear to the charity's fundraising team that the waterways mean different things to different people. Before 'Love My Stretch', supporters could engage financially by becoming a 'Friend' or donating cash gifts to local appeals, but there was nothing that allowed them to express their passion for a particular stretch of waterway. 'Love My Stretch' was the solution: designed to be an audience-led, all-digital proposition that engages positively from the outset.

Since launch, the product has been embraced by people from all walks of life – from dog walkers, community groups, individuals celebrating the life of a loved one to romantic reminiscers – everyone has a story to tell about their favourite stretch, and this is precisely why the product was created – to give supporters of the Trust a vehicle to express this connection.

As Silvie Morelli, from the Canal & River Trust, says: 'The big bonus for us is it gives insight into how people connect with us emotionally – this is important for any charity but especially us as a relatively new one, previously Public Sector and therefore often viewed as having a purely 'maintenance' function. 'Love My Stretch' is also a valuable resource we can mine for ideas and features with local resonance, to help feed into the bigger picture, allowing us to streamline and tailor our programme to further engage donors.'

She adds: 'Regionalising content has had a powerful effect on our retention programme. In one area, email open rates increased by >5% in the next send and CTO by >50%! Unsubcribes are lowering with every regional send that goes out.'

Some favourite stories and reasons for support:
"Where I fell in love with my wife for the first time."

"On my first narrowboat trip nineteen years ago, I watched the sun rise from these locks, I was hooked on canals from that moment."

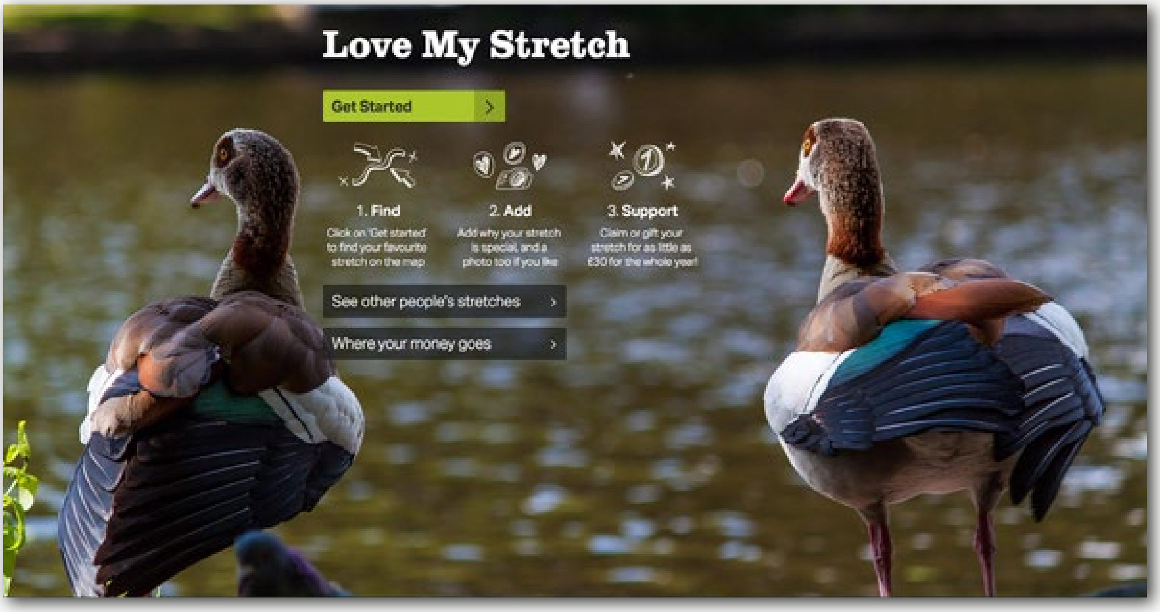
"This is where our puppy Labrador, Murphy, fell in..... and learnt to swim."

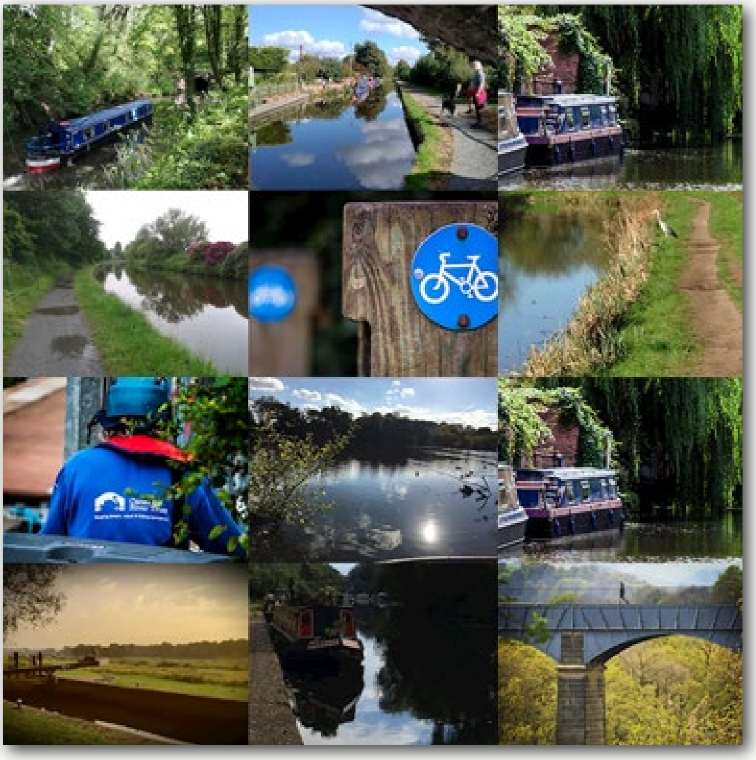
"Need to conserve Canal Street for the LGBT community, past, present and future."

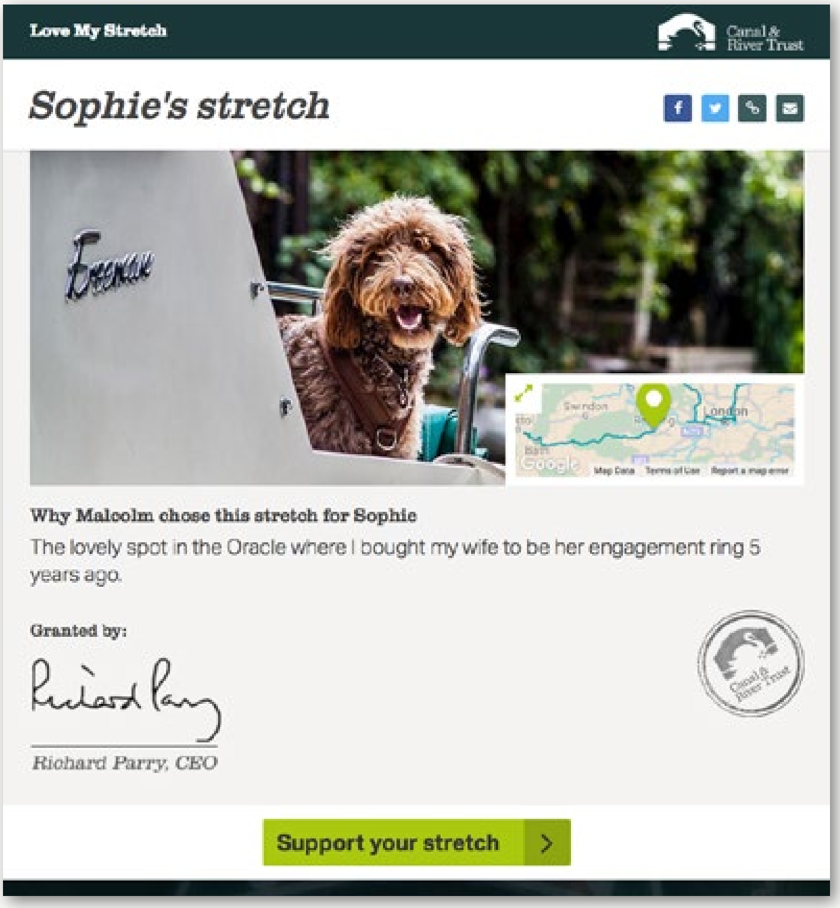
Since launch in late 2015, 'Love My Stretch' has generated close to 300 cash gifts for the Trust. However, this product is more than just income generation – it has highlighted an invaluable rich fabric of individuals keen to engage, support and learn more about the Trust's work across their network of canals and rivers.

Supporters of 'Love My Stretch' will be taken on a bespoke onward email journey, with the aim of educating them about the Trust's work, inspiring them and offering opportunities to support the Trust with a regular gift by becoming a 'Friend'.

Here is a charity sharing the pleasure of a shared passion, and helping supporters to make choices and get involved in ways that make them feel connected and involved, as well as learning as they go. It is a good example of how you can build donor involvement, sharing, learning and personal experience into the very fabric of how you support a chosen cause.





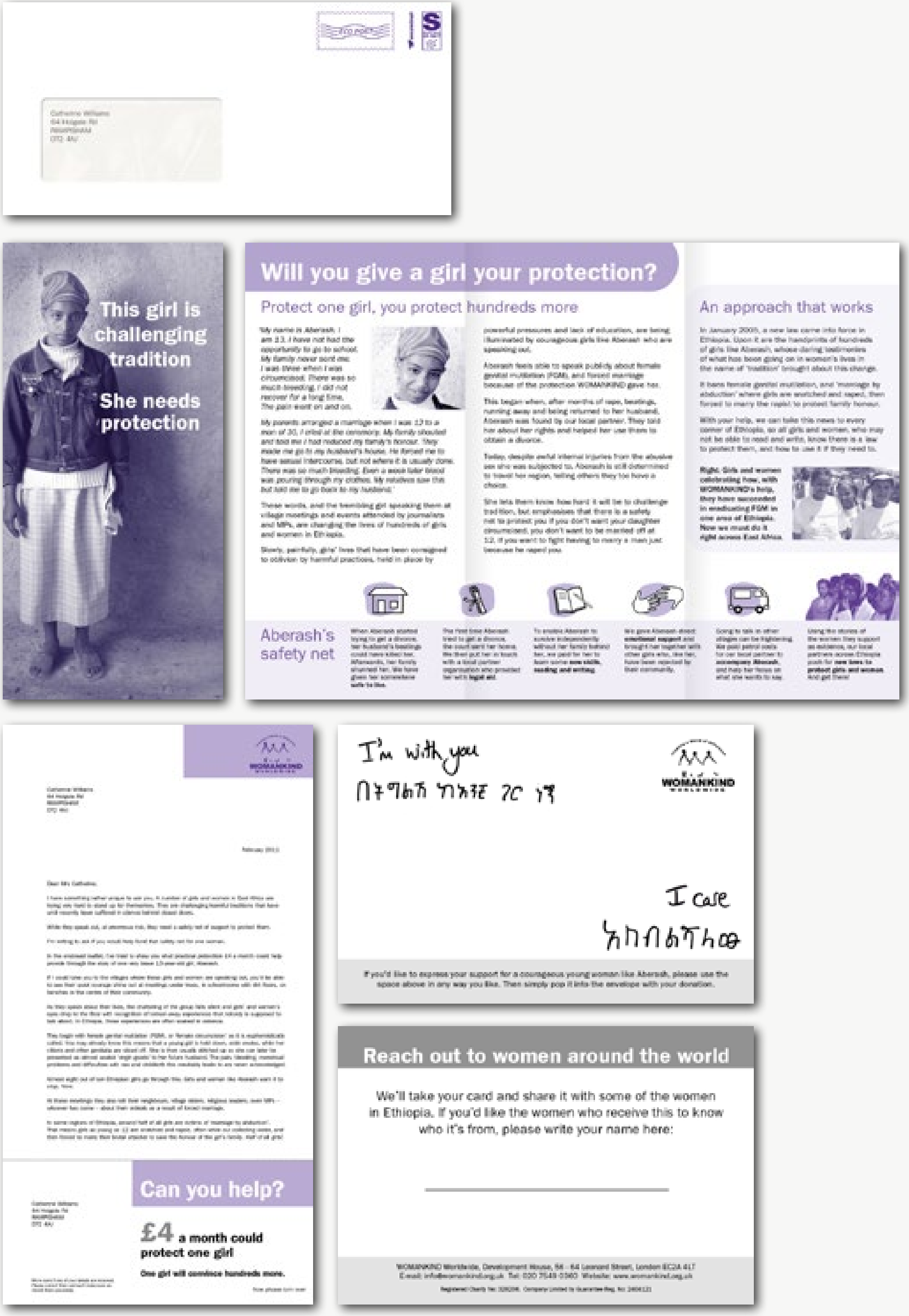

Love My Stretch
Canal & River Trust
Sophie's stretch
Why Malcolm chose this stretch for Sophie
The lovely spot in the Oracle where I bought my wife to be her engagement ring 5 years ago.
Granted by:
Richard Parry, CEO
Support your stretch

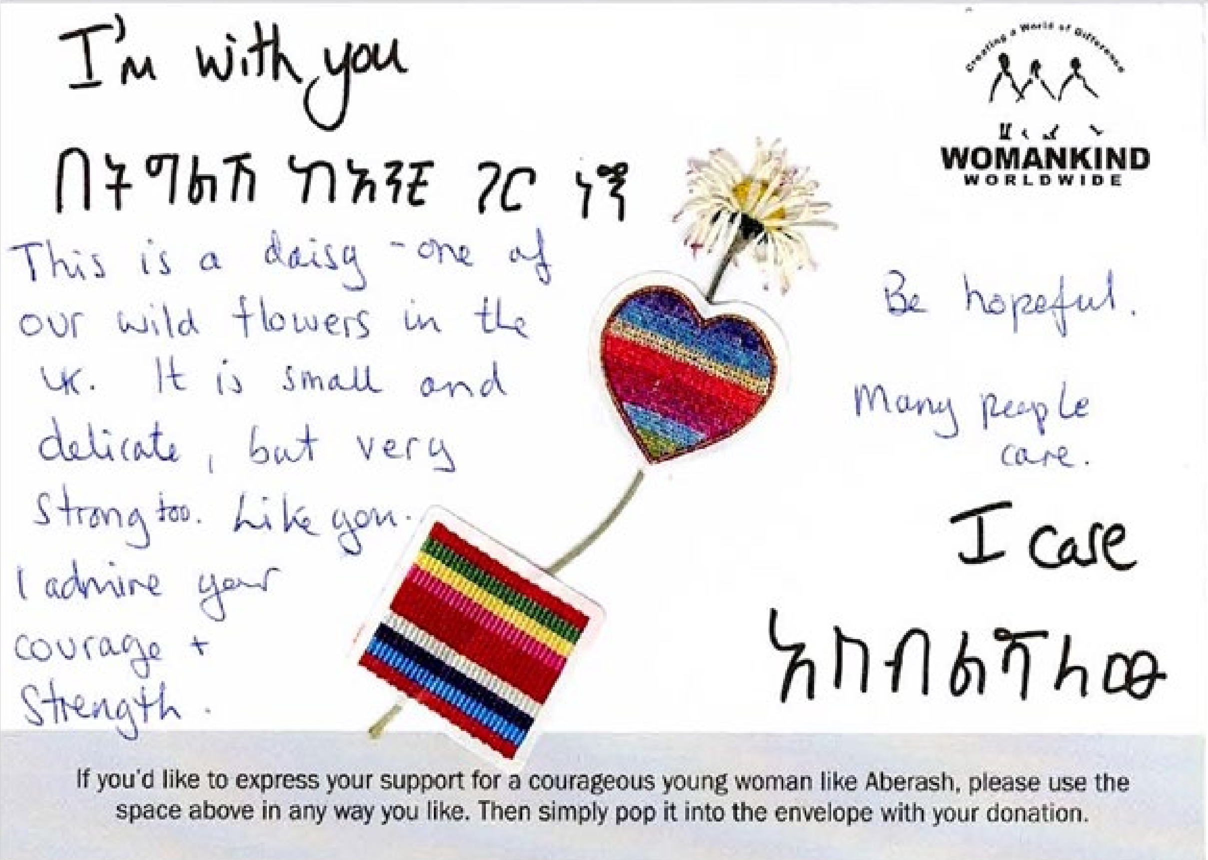

Canal & River Trust
Proudly supported by
Sophie
Granted by:
Richard Parry, CEO

Womankind Worldwide

Other charities too give donors the chance to express their personal feelings – sometimes to a specific beneficiary. In a successful donor recruitment pack where Womankind shares the story of Aberash, a young girl who suffered FGM and a forced marriage, and who was helped out of her situation by the safety net of services provided by Womankind, donors are given the chance to send their own personal message of support to Aberash.

This is also expressing a choice – choosing to share sometimes personal thoughts and feelings – and by asking donors to express what they feel, people really think about Aberash has gone through, and form a much more personal and meaningful connection as they give their first gift.




I'm with you

በትግልሽ ከአንቺ ጋር ነኝ

This is a daisy - one of our wild flowers in the UK. It is small and delicate, but very strong too. Like you. I admire your courage + strength.

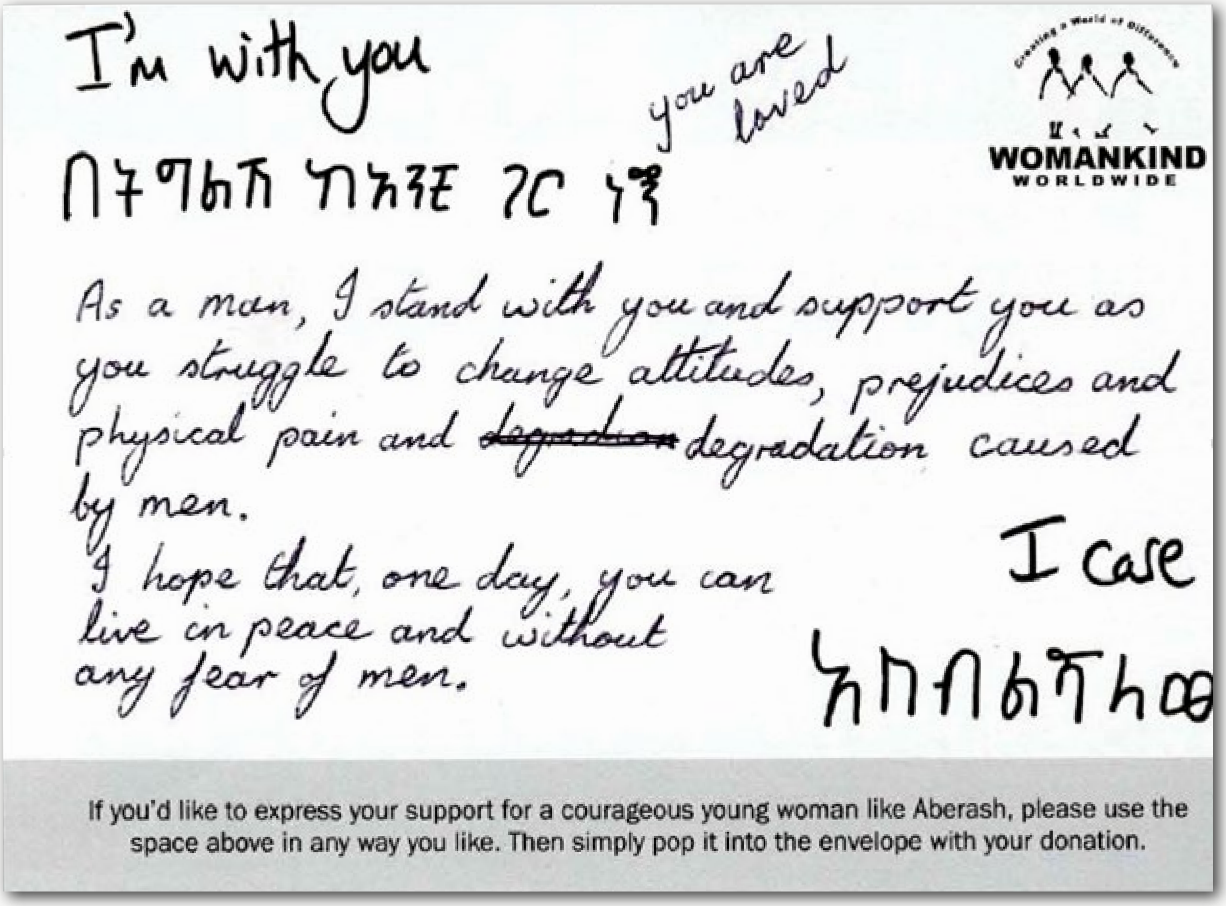
Be hopeful.

Many people care.

I care

አከብርሻለሁ

If you'd like to express your support for a courageous young woman like Aberash, please use the space above in any way you like. Then simply pop it into the envelope with your donation.


I'm with you

you are loved

በትግልሽ ከአንቺ ጋር ነኝ

As a man, I stand with you and support you as you struggle to change attitudes, prejudices and physical pain and ~~degradation~~ degradation caused by men.

I hope that, one day, you can live in peace and without any fear of men.

I care

አከብርሻለሁ

If you'd like to express your support for a courageous young woman like Aberash, please use the space above in any way you like. Then simply pop it into the envelope with your donation.

In the thank you mailing, donors are invited to contact the charity if they would like different sorts or amounts of contact.

By dealing with people in such a personal way, the charity shows it supporters that they each matter individually to the charity and its important work.

Feed the Children

In just this way, at the height of the Bosnian crisis, emergency press ads were placed in newspapers by aid agency Feed the Children, alongside media headlines of the unfolding humanitarian crisis. Potential donors were given the chance to pay for a baby box of essential supplies to be provided to a mother and her family. As well as the tangible sense of giving one family in need a box of much-needed help, donors were invited also to send a personal message to be enclosed in the box of supplies they were enabling to be given. What a chance - to help one family, and express your support for them: enabling donors truly to give directly to a beneficiary in the midst of a terrible time. Once again, exercising this choice of including a message of support gave the donor a much more personal and meaningful engagement, and a rewarding sense of having made one family's life a little bit better.

Case study 5: using the telephone to build relationships

With thanks to Jessica Bianchi-Borham, and Rebecca Patterson, of Pell and Bales

Some telephone calls (especially some of those made in the not so recent past) have been singled out by supporters as a particularly intrusive type of communication.

If it's not done well, let's look at how a fundraising telephone call can feel. You answer the phone, at a time not of your choosing. You are caught unawares, called away from something you were doing. The caller is prepared; you are not. There is nowhere to hide – it is a one to one conversation. Of course, you do feel sympathy and you'd like to help if you can. You may end up committing to something you're being asked to do, that you didn't really intend and may not suit you that well right now. You go away not quite sure you should have agreed to it and no closer to a cause you may or may not feel deeply about. Worse still, we know that some older people in particular, with little social contact, may be badly equipped to deal with a caller who is setting out with a particular goal in mind.

That's a description of some of the calls that might have taken place in the past.

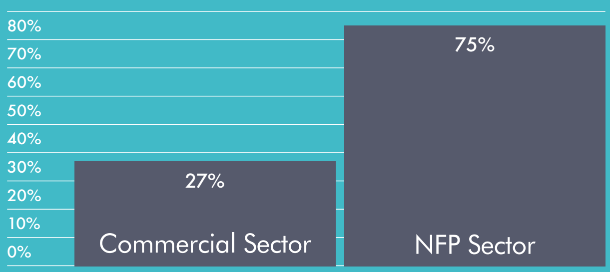
The opportunity now

Now let's consider the opportunity. This opportunity, already happening in some quarters, is for something quite different. To use the telephone as a really positive channel that can enhance and develop the relationship between a charity and a donor, using the opportunity of a fluid one to one conversation to find out more, offer choices, gather preferences and help the donor to develop the relationship that suits him or her best.

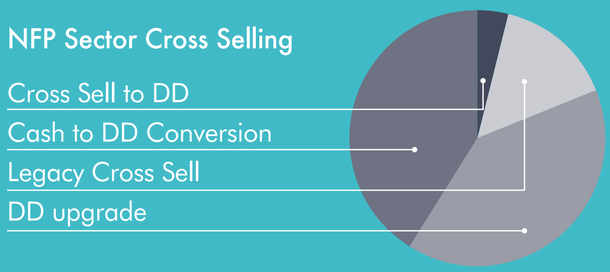
Pell and Bales, who have now ceased trading, were looking at how telephone calls can be used in this way taking advantage of the unique one to one opportunity to chat openly and dig deeper: to discuss the charity and its work and find out about your connection; to find out what type of support or interaction with the charity might suit you best; to gather opt-ins for future calls; to listen to what the donor would like to say; to be led by the donor through the call, to find ways that the connection between donor and charity can become stronger and beneficial to both the donor and the charity.

Do we really have donor led products

% Outbound Calls: Cross-Sell/Up-Sell



NFP Sector Cross Selling



Commersial world

- Cross sells and up-sells are driven by customer choice, preferences and requirements. They are demand led.

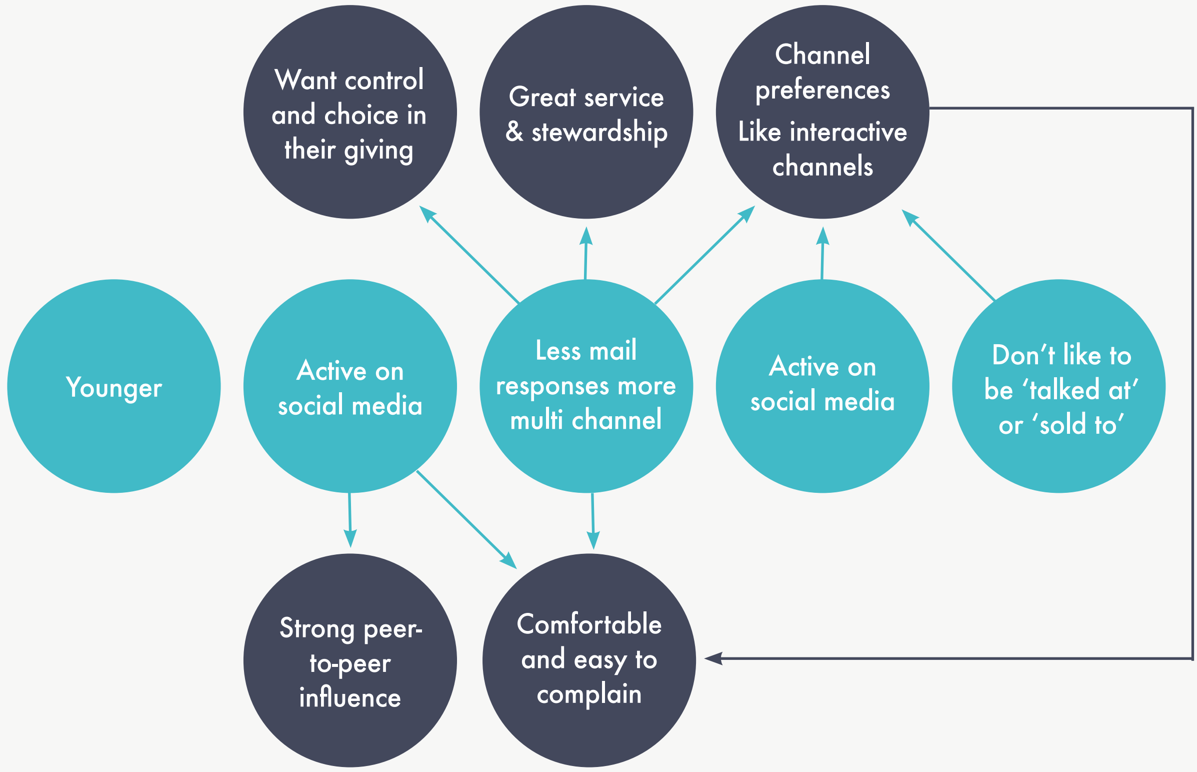
NFP sector

- Tend to make the same ask over and over without listening to the donor
- We seek to change the way people give (e.g. from cash to DD) rat her than increasing the number of engagements and product types
- We invest huge amounts of time and money chasing a £2 a month DD from someone that might otherwise raise £2,000 from an event
- Choice and Driving Multiple Engagements will become key to LTV

The new audience

Pell and Bales also note that the fundraising environment is changing as generational attitudes change. They identified a new, younger audience with quite different needs, expectations and influences.

The new audience



At the same time:

- The internet has made it easier for your prospects to be reached by other charities: competition is greater
- It is easy to cancel a regular gift through online banking
- We are recruiting donors at levels (gift values) and on products they are not comfortable with, to sustain recruitment targets.

For these new donors, offering choice and control will be more important than ever – and charities will need to find ways to engage in dialogue that gives the chance to express their wishes and engage as they like.

A supporter-centric programme

Pell and Bales' recommendations for a supporter-centric programme recognised that it is vital to look at the right measures of success: to realise that responsible, good fundraising cannot be measured by (short term) income alone.

- To truly understand how successful fundraising is, we must understand how it makes supporters feel
- By monitoring supporters' feedback, including trends, we can better evaluate the fundraising that we do and make informed decisions about strategies moving forward
- Supporter satisfaction should become a standard KPI in all fundraising
- Health check scoring can be developed to evaluate this (and they were proposing ways to do this).

The right measures of success

A longer-term view on performance should be taken to ensure we are nurturing and protecting the relationship with the donor and not just managing a transaction. In addition to enhanced data capture and satisfaction surveys, Pell and Bales suggested that the following work could be done, using the phone, to enhance fundraising:

- Regular attrition reporting by campaign, audience and approach
- Complaint level and type reporting by campaign and approach
- Secondary campaign objectives should be developed to drive engagement and commitment, e.g. encouraging greater interaction through petitions or social media, building trust
- Regular satisfaction and feedback surveys should be done, including possible (tele)focus groups
- LTV models and forecasting should be built around a richer mix of supporter-centric KPIs

A future-proof telemarketing programme

Pell and Bales mapped out a possible journey from the past, organisation-led approach; through the present, which balances the needs of the organisation with those of the donor, to a future, more donor-led approach; and looked at the creative approach behind a more donor-led call.

The future proof TM programme

Past	*Present*	*Future*
Organisational Led	**Organisational, Donor Balance**	**Donor Led**
Examples • DD only calls **Examples** • No. of DDs • Short term ROI **Approach** • Ask(take) • Repeated use of single ask/type of call, one approach to all • Limitedtargeting based on previous transactional behaviour • Org. led products and propositions	**P&B Examples** • Loyalty calls • Legacy profiling • GA consortium • Flex DD **KPIs** • Retention • Short-med term income **Approach** • Soft ask (give/take) • Improved diet of calls, not always asking for money • Sophisticated targeting and pre-ask screening based on attitude • Donor friendly products and propositions	**P&B Examples** • Choice Campaigns • Survey Calls • Longer journeys to DD and acceptance that DD is not for all **KPIs** • Supporter satisfaction & Engagement • Life time value; • Future giving(all forms inc. legacy) • Retention • Multiple relationships **Approach** • Offer (give) • Move away from needs based, story telling (all about the org) • CRM approach to determining best offer • Donor led products and propositions

A supporter-centric programme

They identified that:

- Compared to the commercial sector, some of whom use the telephone in a much more creative, open and flexible way, the majority of calls made by the charity sector adopt a similar approach: problem, solution action and focus on the needs of the organisation and that
  - supporters do not feel listened to
  - supporters pre-empt the reason for the call and are waiting for the ask
  - little emphasis is placed on listening to the supporter, and allowing them to talk about their reasons for support
- The way the call is positioned can be developed differently – not just calling about the charity's urgent need now
- Instead, focusing on the supporter, offering donor choice; making softer asks; finding out what really motivates the supporter; and if appropriate offering other non financial ways to help that might suit the supporter better.

Developing the creative approach

Current Approach	Donor-led calls
Case for giving (needs based)	Inspiration, welcome or survey
Focused on charity/beneficiary feelings towards support. Providing updates.	Focus on supporter, their motivations, interests, genuine interest and relevance to the donor
Emotional fundraising, need (problem/solution/ in action)	Relationship fundraising- Adrian Sergeant drivers commitment weaved into calls
Telling the donor why they should give (more)	Empower and inspire supporters to take action/give
Scripted	Conversational
Charity/fundraising tone of voice	Donors tone of voice
An ask	An offer
X3 DD/upgrade asks per call	Less asks
Fixed asks	Flexible, open and range asks
DD	Supporter preferred giving methods e.g. Mobile giving, events
Little choice or preference	Multiple choices
No positive outcome if reject primary ask	NFO on all calls
We might use the same icebreakers and same information in each call discuss	Listen to supporters - capture insight to use in future communications and inform future product offers

Barriers to using the phone to offer real choice to donors
However, they also noted that we operate in a climate of tight budgets, with organisations that are increasingly risk-averse, tied to meeting one year targets, and where real change is hard to drive. They identified the barriers to using the phone to offer real choice to donors as being:

- Charity budgets mainly focus on year one income and ROI
- Lack of appropriate KPIs and reporting mechanisms around satisfaction, engagement and LTV
- Lack of senior management buy-in or engagement
- Slow decision-making within organisations meaning conditions for innovation are not present
- Risk-averse culture particularly following the last 12 months.

They are right.

Just as in other channels, we need to move from mass campaigns driven by one year ROI measures to more open, flexible, two way relationships where donors are consulted, listened to and offered the type of interaction that suit them – giving them choice and control, a chance to express what they prefer, offering reassurance, building trust, and leading to a more enjoyable, engaged, rewarding and valuable long-term relationship.

Case study 6: Friends of the Earth

Hand in hand with offering choices and managing donors' preferences goes listening to what your donors think and feel about your charity.

In the wake of the many stories of bad practice from charities hitting the media in summer 2015, Friends of the Earth decided to broach the issue head-on with their supporters.

A letter went out from Joe Jenkins, Acting Chief Executive, to every single Friends of the Earth supporter. It set out clearly how much supporters are valued as the partners without whom none of the charity's vital work could happen; showed appreciation and gratitude for all that they help to achieve; laid out the shared values that bring supporters together with the charity; acknowledged the situation in the press; and asked whether the supporter was happy with the ways that charity communicates with them.

It explained how it communicates with donors, and why; what it hopes to achieve and give you; and what pitfalls it hopes to avoid. It openly asks donors to share their views, providing a space for donors to write back, and inviting feedback at any time.

What is so valuable here is a simple, honest letter to supporters; sent out quickly in response to a growing series of very public charity fundraising horror stories; asking supporters openly what they think. Such open dialogue, inviting feedback and comment, reassures the supporter, gives them a chance to have a voice, and shows them that what they say will help inform how the charity will communicate with them in future.

It is such a simple step – but it shows concern, offers reassurance, invites your feedback about what works for you, and helps build trust and loyalty. You may not choose to reply, but you will remember being invited to have your say.

friends of the earth
see things differently

22nd June 2015

Are we getting it right?

Dear Mr Parkes,

Firstly, let me thank you personally for the support that you've provided to Friends of the Earth. The difference we make in the world simply isn't possible without your involvement – over 90% of the money spent on campaigns for people and nature comes from individual donations and legacies. And it's your voice that makes ours too strong to be ignored. Thank you.

I'm writing to you today to make sure that you're happy with the ways that we communicate with you. It's been hard to miss the media coverage of charity communications in recent weeks from the tragic circumstances surrounding Olive Cooke to other tabloid investigations charities have been put under the spotlight. Although Friends of the Earth has not been directly involved, it certainly made me stop to reflect about our own approach and to make sure we are getting things right.

We reach out to people who support us in lots of different ways. Sometimes we write, other times we call on the phone – and often we run events up and down the country too. At no time should you ever feel like you're hearing from us in a way that makes you feel unhappy. We hope to inspire you and give you confidence that your support is helping us change the world. And we want to know what you think too, not just send out one-way messages – we need your ideas and suggestions to help us do even more.

So, I'm sending this letter to all of our donors of our supporters, to make absolutely sure you're happy with your support for our work. On the back of this letter, I've left lots of space for you to **let me know if there's anything we can do differently for you.** I promise that if there's anything we can do better to improve our communications, we'll do it.

Friends of the Earth is much more than just a national charity. We're a movement of people who share many of the same hopes and dreams for a better life. Everything we do is about creating a fairer world where people and nature thrive. I know that there isn't a single Friends of the Earth success – from protecting threatened species like beaver and bears to the world first climate change act – that would have been achieved without people like you getting involved. Which means the way we communicate with you is fundamental to how we make a difference.

I very much hope that we are getting things right, most if not all of the time. And that you're happy to hear from us about our work and ways in which your support has helped us to win vital campaigns. Please do send back any comments that you'd like to make and I'll make sure we'll try and sort out any problems while continuing with the good stuff! Of course, you should also feel free to contact us at any time, not just in response to this letter. There are lots of ways to reach us, outlined on our website here **www.foe.co.uk/feedback** and you can call us on 020 7490 1555.

I'm really proud of all that we achieve together. Thank you so much for helping us make a difference.

Best wishes

Joe Jenkins
Acting Chief Executive
Friends of the Earth

Please write your comments in the box below

Mr M Parkes
1120019
AM1506001

Part Five: Bringing it all together

We have seen that research shows that donors want more choice and control and that this would improve trust, retention and the likelihood of giving in future. And that not offering this damages donor confidence and alienates well-intentioned and generous people.

Commercial organisations have shown that offering choices and managing preferences helps them to be relevant and interesting to their customers, building brand loyalty and customer value.

Research into science and psychology backs up human instinct: that treating people as individuals, respecting them and listening to what they tell you, builds trust, loyalty, commitment and valuable relationships.

A real opportunity

This gives us a fantastic chance – to prove to our donors what a rewarding experience supporting our cause can be, but to put choice and control into their hands. Be your charity large or small, technologically sophisticated or just a small team, the same principle goes: it is about continually giving your donors the choice to change and adjust how, when and what they hear from you, in a way that is appropriate for your charity.

We call this 'continuous donor choice'; and we feel that this system we are proposing offers a great opportunity for fundraisers to build trust, long-term relationships and lifetime value with the people who care about their cause.

Introducing the principles of 'continuous donor choice'

Continuous donor choice is an approach to putting donors in control of how they hear from the charities they choose to support.

For too long what donors receive from the charities they support has been entirely decided for them by fundraisers seeking to maximise income for their cause. Donors are sent what the fundraisers want them to receive, the fundraisers' choices mainly driven by what they believe will most easily and quickly enable them to achieve their financial targets.

It's obvious that this has to change. For donor choice to work well for both the donor and the fundraiser it has to start from the donor's point of view. Fundraisers need to see the process through the donor's eyes, to put themselves in their donor's shoes whether the donor is new to the cause, has been supporting it for some time, or is even becoming inactive.

It is more than likely that most donors will not wish their exercising of communication choices to damage fundraising or to reduce charities' ability to contact people who might support them.

Most donors would not wish (a perhaps randomly made decision at the start of their relationship with a cause) to restrict indefinitely the charity's ability to contact them, even at a time of crisis or good news.

While giving may reduce in the short term there's evidence to suggest that instead of damaging or restricting fundraising income, offering donors choices will increase retention, trust and the willingness to give.

The long-term benefit of giving donors choices will be happier donors, better fundraising and enhanced fundraising results. What follows is a detailed, step-by-step proposal for a system of genuine donor control driven by what most donors want – continuous donor choice.

Some key considerations

Charities always have to be guided by the concept of the truth, told well. At all times they must behave legally, decently, honestly and truthfully when communicating with donors and potential donors.

So a good question for the fundraiser to ask him or herself is, if my mother were a donor, how would I wish her to be treated?

Donating to a charity should always be a voluntary act and a rewarding, pleasant experience. To restore and consistently promote public trust and confidence, donors now need to be given and to achieve practical control of what they receive from the charities they support, or choose not to support.

Continuous donor choice from the fundraiser's point of view: How it works for new donors

In their first contact the new donor is welcomed and given choices. If he or she doesn't do anything the charity will send them communications that have been (hopefully carefully) selected and compiled by the fundraiser.

The welcome information that every donor receives should clearly inform them that they can control everything they are sent from now on, that in every future communication they will be given the opportunity to review their contact preferences and to change these easily, as the donor wishes, or to leave contact preferences as they are.

If the donor wishes to change how they hear from the charity.
The donor can express a preference, or set of preferences, based on the choices he or she has been offered. Larger charities may offer a sophisticated, tailor-made range of choices. Smaller charities may offer fewer options, but the principles are the same.

The scale and type of options are up to the charity but all must be practical, manageable and sustainable, all must offer donors the chance to increase, reduce or cease completely what they receive. In each communication donors should be given simple, easy-to-make choices and be invited to telephone or email the fundraising office if they have any issues or questions.

If the donor wishes to stop hearing from the charity altogether.
The donor has made a clear decision. He or she wishes to opt out. This should always be respected. The donor will not hear from this charity again unless he or she decides to re-opt in by another means, at another time.

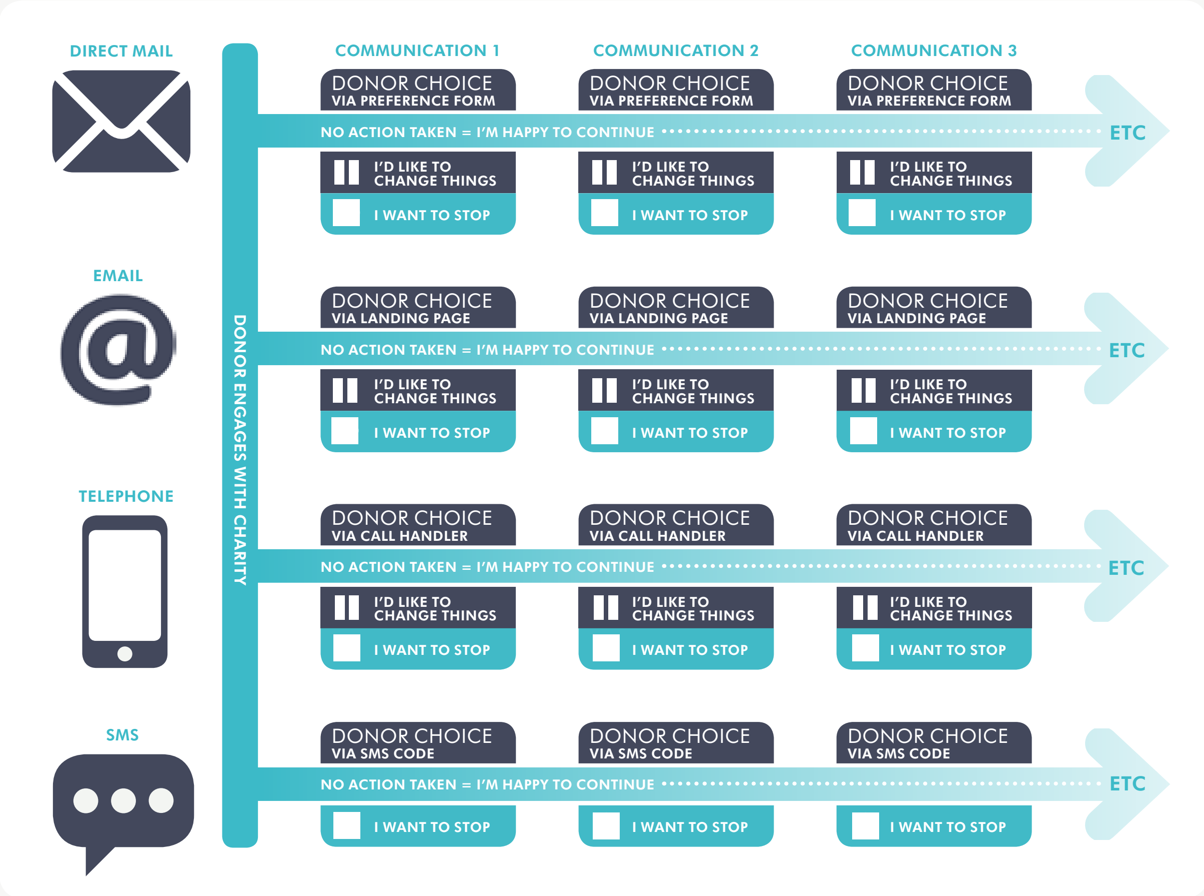
Continuous donor choice from the fundraiser's point of view: How it works for existing donors

If the donor does not take action to change what the charity wishes to send them, or has been sending them.

The chance to change is offered in every communication so there should be no ambiguity that, if the donor does wish to change anything at all, he or she can easily do so. In the absence of any such notification, communications can therefore continue as before.

If the donor wishes to change how they hear from the charity.
As the chance to change is offered in every communication the donor can easily inform the charity of his or her desires at any time.

These options must always be offered and always honoured.



As shown in the illustration above, think of this as a traffic light 'permission' system, dictated by the donor and flexible to their adjustments at any point in time. Please note, SMS offers no preference choices other than the chance to stop or to continue to receive texts.

Continuous donor choice from the fundraiser's point of view: How it works for inactive former donors

If the donor continues not to respond to whatever the charity sends them.
It seems likely that fundraising charities will have a specific time-limited opportunity to re-engage and reactivate donors who for whatever reason have simply stopped not just giving but responding in any way.

All reasonable efforts at reactivation can be employed by the charity as long as with each communication there is a clear and comprehensive opportunity for the donor to choose future communication preferences, including the full opt out.

If after an agreed period of time there is still no response the charity may choose to consider that an indication of opt-out, so no further contact should be made.

But as substantial numbers of donors mailed just once each year do re-opt in even after six or seven years, providing valuable support, it is to be hoped that an arbitrary time limit shorter that this will not be imposed on charities and donors – providing the continuous donor choice options are always offered, in every contact.

If the donor informs the charity that he or she wishes to change how he or she hears from them.
Then he or she has effectively either chosen to reactivate themselves or has opted out.

Continuous donor choice from the donor's point of view: How you can keep control of how your favourite charities contact you.

To be a donor to any cause or charity you have to give a first gift. Here's what'll happen when you do.

Your gift can be anonymous, which involves nothing more than sending it in. If you are willing to give the charity your name and address you will be asked to complete your details on a reply form (depending on the medium of communication used this information may be provided via the telephone, by SMS message, via email, or by some other means).

Charities always prefer to have your contact details so that they can confirm safe receipt of your donation and tell you about the good things they'll be able to do now, thanks to your support. And, if you are willing, to engage your future support, appropriately.

Because some see this last point as contentious, charities also want you to be in control of how and when they contact you and what about.

So either in this first communication, or when you receive an acknowledgement and a letter thanking you for your initial gift, you will receive a further reply form. This will also contain a number of choices you can make about how you would like the charity to communicate with you in the future, specifying how often, on what subjects and when you'd be willing for the charity to make contact.

And even if you'd prefer the charity not to contact you at all.

The choices you'll be offered include:

- Whether you want to receive the charity's news for supporters. This will tell you about what the charity has done with the donations it receives and the kind of differences your gift will make.
- Whether you wish to receive the charity's regular appeals (most charities usually send four or more postal appeals each year, though this does vary from charity to charity).
- Whether you'd prefer to receive just one appeal each year. This will usually be sent in the period before Christmas but you might also be asked when might be the best time for you to receive that appeal.
- The charity might ask how you'd prefer to hear from them, for example by post, by telephone, by email, or by text to your mobile phone. Or, if you prefer, by none of these routes.
- Sometimes you'll be offered choices on the kinds of information that you can receive, as well as the frequency. For example, information on certain selected projects, or detailed feedback on a project that interests you, or where your gift has made a difference.
- If you prefer not to receive any appeals you will always have the chance to opt out of further communication from the charity. Or to opt back in if you'd like to receive more. The choice is yours, always.
- From now on each time that you hear from the charity (based on the choices you made earlier) you will be given the chance to change your preferences as you wish. So you will always be in control.
- These or similar choices should be available to you whenever you hear from any charity, even if you've never supported that charity before. The charity will always respect your rights to the details you have supplied and will not sell, pass on, or alter your personal data without your permission.
- Other choices may be offered, depending on the capacity of the individual charity and the range of choices they wish to offer their donors.

Enjoy being a donor!

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