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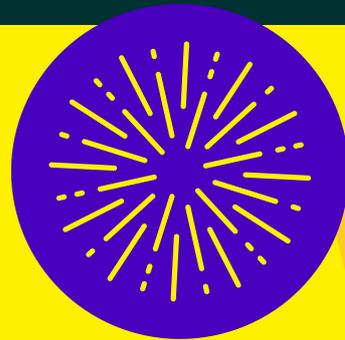


Sheffield
University
Management
School.

CULTURAL SECTOR NETWORK

DEALING WITH THE CRISIS

Creativity and resilience of arts and cultural
fundraisers during COVID-19



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FOREWORD

May 2021

This survey is the first time that the collective voice of UK cultural fundraisers has been heard during the pandemic. There are important lessons to be learnt from what the respondents have told us. These need to be taken up by the government and everyone who wants fundraising for arts and heritage to play a critical role in ensuring that cultural activity itself will not just recover but thrive into the future. This survey was conducted in 2020, but what it has to tell us is still of continuing and significant relevance.



Martin Kaufman

Chair

Chartered Institute of Fundraising
RAISE Steering Committee



Dana Segal

Co-Chair

Chartered Institute of Fundraising
Cultural Sector Network

The findings presented in this research give unique insights into how fundraisers in the arts and culture sectors manage the COVID-19 crisis. Whilst resilience and innovation continue to be key skills characteristic of the profession, only with the help of substantial support – both financial and skill-based – will fundraisers be able to contribute to create a financially sustainable non-profit sector akin to pre-crisis levels.



Dr Marta Herrero

University of Sheffield Management School

INTRODUCTION

Arts and cultural fundraising encompasses a range of activities and campaigns. From patrons and high-value giving, through to regular giving and membership schemes. Events and activities are an important part of the mix, as are grants for creative projects and community work.

The closure of venues and cancellation of events has challenged these fundraising plans. This has created major changes in how arts and cultural fundraisers have been able to work.

A quick response to the first lockdown in early March 2020 pushed cultural fundraisers to act. They launched campaigns, created content, and found digital ways to connect with supporters. They applied for emergency funding from the government and private trusts and foundations. They managed supporters whilst dealing with logistics, financial planning, changing strategies and plans. This necessary adaptability has been key to both success and survival in this period.

“ I actually think fundraising will thrive because the plight of arts organisations is much more public. Whilst I think work will suffer, fundraising may now be given greater prominence. ”

— ‘Interviewee FR17’

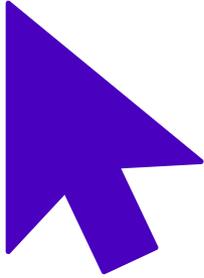
Arts and cultural fundraisers have responded to COVID-19 with creativity, resilience, and flexibility. We can expect old activities and ways of working to return post-pandemic. But the way in which funds get raised in the future is likely to develop in new ways, informed by these experiences.

At the same time, we recognise that COVID-19 has placed significant pressure on fundraising teams – with the demands on emergency fundraising coupled with increased workloads, reductions in staff team and the challenges of working from home – which has a significant impact on job satisfaction. There is a real risk, without addressing these issues, of talent leaving the sector and fundraising all together.

In response, RAISE and the Cultural Sector Network is committed to providing cultural fundraisers with a holistic programme of support to ensure their wellbeing and motivation remains as we emerge from the pandemic.

EXECUTIVE SUMMARY

Key research findings at a glance



1

Arts and cultural fundraisers have adapted and responded to new ways of working, taking new approaches and changing their fundraising activities during the pandemic. Respondents reported **increased social media and digital activity**, as well as a rise in more traditional forms of fundraising such as telephone and email.



2

The primary focus for arts and cultural fundraisers was on **maintaining and enhancing relationships with existing supporters**. This was complemented with a marked rise in offering supporters enhanced digital or online activities and access to arts and cultural activity such as performances, exhibitions, talks.



3

When reflecting on the success of new approaches and different activity undertaken during the pandemic, a majority of respondents (55%) reported that the results had 'met' or 'exceeded' their expectations. However, despite these encouraging results on new activity, overall almost two thirds of respondents (62%) said that they **expected their organisation's income to fall** during the pandemic.



4 The ongoing impact of the pandemic is **having an effect on the workload and wellbeing of arts and cultural fundraisers**. Almost two thirds of respondents (63%) reported increased workload, and instances of stress and wellbeing-related concerns were raised during interviews, whilst levels of job satisfaction have felt to have fallen during the pandemic. There is a real risk that if staff welfare issues are not addressed, there will be a significant loss of talent from the sector.



5 Arts and cultural fundraisers would value increased training opportunities, and also feel that **there needs to be enhanced government support for the arts and cultural sector** with longer-term financial support into the future. Worryingly the survey highlights that some arts and heritage organisations are falling between the gaps of the emergency support available.

“ I think the basic skills of fundraising do not change too much. But I think resilience has been incredibly important in the last few months: being able to get knocked down and stand up because you didn't get a grant or something that was going to happen, or something had to be changed at the last minute because it was impossible to do otherwise. I think that kind of resilience and perseverance has been incredibly important.

— 'Interviewee FR9'

PURPOSE AND METHODOLOGY OF THE SURVEY AND INTERVIEWS

1



Focusing on cultural fundraisers themselves, we wanted to:

- **assess the impact** of COVID-19 on philanthropic giving;
- **understand** how cultural fundraisers have responded to the pandemic;
- **characterise the challenges** they faced professionally and personally; and
- **uncover** what strategies and initiatives were implemented to address these.

The online survey was completed between 21 July and 14 August 2020. This was after the easing of the first lockdown, and before government recovery funding was confirmed.

The landscape has changed considerably between then and now – with the initial easing of restrictions and some reopening of venues over the summer and autumn, followed by a second national lockdown and the announcement of Round 2 of the DCMS Culture Recovery Fund.

Many of the findings presented here, particularly around staff wellbeing, expectations around fundraised income and the use of digital and social media, have continued relevance today and in rebuilding the sector in the year ahead.

The 60-question survey was extensive, covering all aspects of fundraising practice and future expectation in the context of the pandemic.

- It was completed by 91 people.
- Most respondents were employed fundraisers.
- Some were consultants associated with one or several cultural organisations.

60

THE SURVEY WAS COMPOSED
OF 60 QUESTIONS

91

IT WAS COMPLETED
BY 91 PEOPLE

Follow up interviews were conducted with survey participants who had indicated their willingness to be interviewed. They were carried out between September and November 2020.

- 18 survey participants were interviewed.
- From a range of junior, mid-career and senior fundraisers, as well as consultants.



The interviews shone a personal light on several of the critical issues revealed by the survey. We have coded and anonymised each interview throughout, e.g. 'Interviewee FR6'.

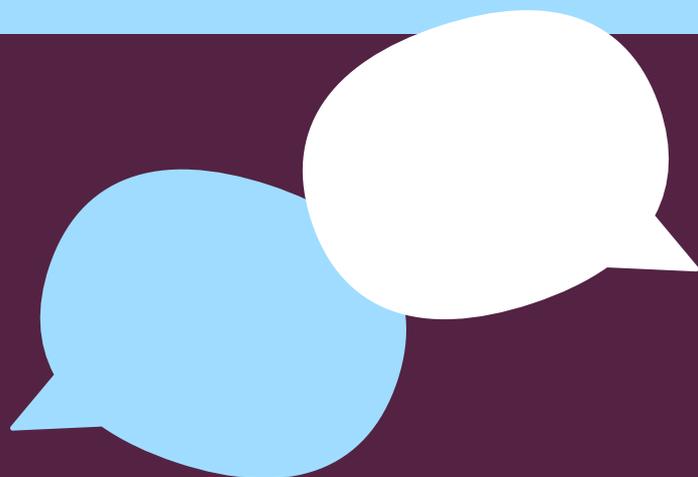
The survey was distributed widely through social media and emails to the professional and personal networks of volunteer committees inside RAISE and CSN, LinkedIn and newsletter groups, and the Chartered Institute website.

The wide range of respondents make the findings useful and (unfortunately) still relevant. It is the only survey to date striving to record the experiences of UK cultural fundraisers working in this crisis.



FINDINGS OF THE RESEARCH

2



PART 1: WHO RESPONDED?

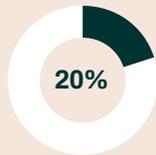
91

RESPONDENTS

A large number of fundraisers who participated in the survey work in the visual arts, including **galleries**, and the **performing arts**. The rest of the sample included **museums, galleries, heritage sites, health and disability arts** and other **cultural institutions**, as well as consultants providing services to cultural organisations.



Fundraising managers



Directors of fundraising



Consultants

There was a good mix of fundraisers working at different levels and with different levels of experience, who could provide a breadth of views.

MORE THAN

76%

IN FULL-TIME
EMPLOYMENT



The majority of respondents (79%) **had not been furloughed**.



Almost three quarters of respondents (74%) described themselves as being **fairly or very confident about their continued employment** as of August 2020.



Almost a third of respondents (32%) **had volunteered for another organisation** during the pandemic, either in a fundraising role or in a different capacity.

PART 2: FUNDRAISING AND COVID-19

Key statistics

- **66%** of organisations said they had postponed projects and/or programmes.
- **34%** of organisations said they had not postponed any planned projects or programmes.

30%

NEARLY A THIRD OF RESPONDENTS SAID COVID-19 WOULD HAVE A SUBSTANTIAL LONGER TERM IMPACT

In addition, they were asked if they had postponed any revenue generating programmes. The impact of COVID-19 has had a marked impact on many organisations' ability to run these programmes.

- **52%** of organisations said they **had not** postponed any revenue programmes.
- **47%** of organisations said they **had** postponed revenue programmes.

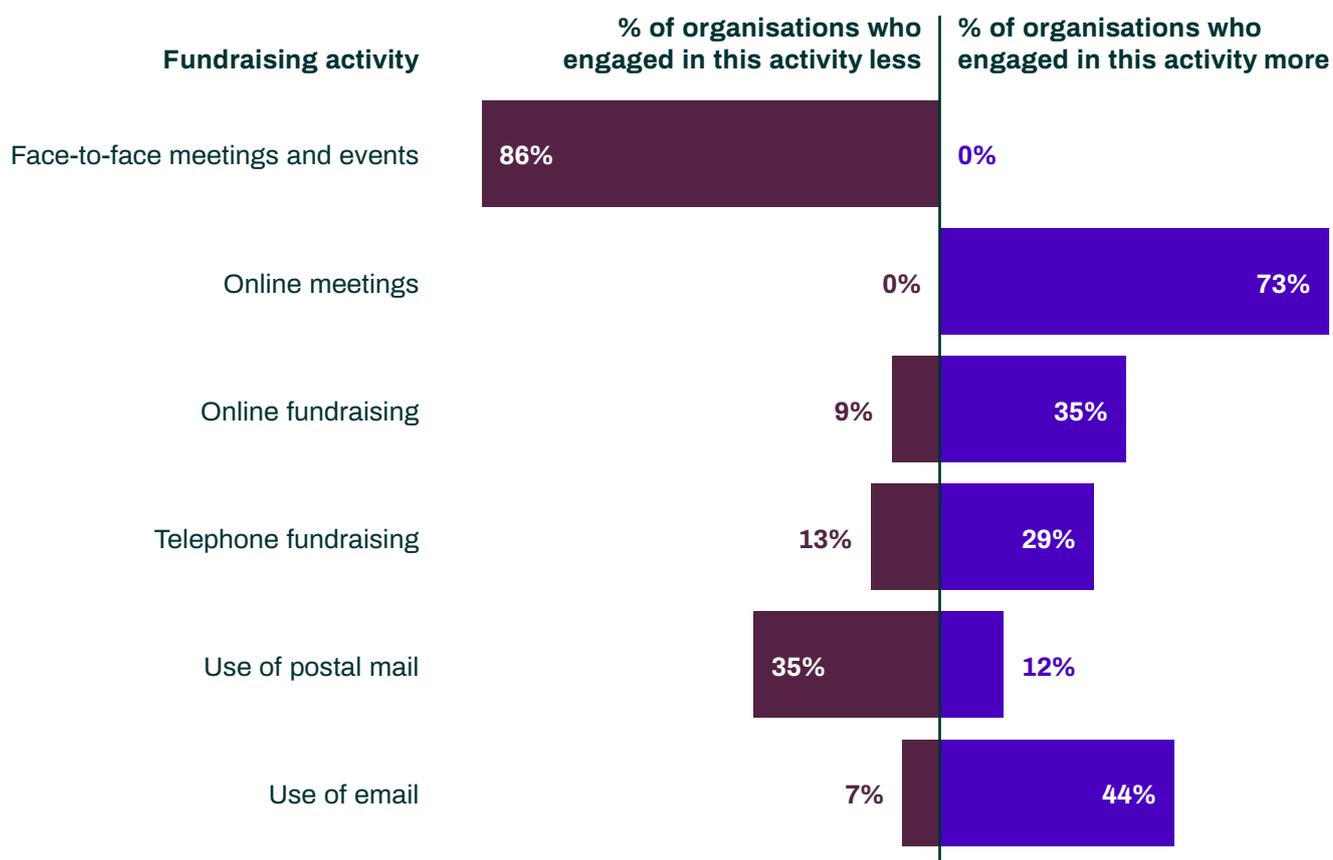
- **62%** of organisations expect to bring in **lower** income.
- **13%** of organisations expect to bring in **about the same level** of income.
- **17%** of organisations expect to bring in **more** income.

- **48%** of respondents said COVID-19 would have a **medium impact longer term**.
- **30%** said COVID-19 would have a **substantial impact longer term**.

Chart 1: Fluctuations in income



Chart 2: Changes in the methods of fundraising



79%

OF RESPONDENTS SAID THAT THEIR FUNDRAISING ACTIVITY OVERALL HAS DECREASED

- **86%** of organisations said they were doing fewer face-to-face meetings and events, with **no** organisations reporting increased activity in this area.
- **73%** said they were doing more online meetings.
- **35%** said they were doing more online fundraising events with just **9%** of organisations saying they were doing fewer events than before.
- **29%** said they had increased telephone fundraising activity, with just **13%** saying they had lower levels of activity as a result of COVID-19.
- Just **12%** of organisations said they had increased their use of mail, with **35%** saying they were using mail less as a result of COVID-19.
- **44%** said they had increased their use of email, with **7%** saying they were using email less as a result of COVID-19.
- **79%** said that their fundraising activity overall has decreased.

Key findings

Most organisations said they were using significantly more digital methods to fundraise, with fewer organisations relying on traditional activities like face-to-face meetings and mail, with the exception of telephone fundraising.

Fundraisers have embraced digital engagement, through online meetings and events.

Organisations also reported a shift away from individual giving to trust and foundations.

Overall, organisations have seen their overall fundraising activity decrease. This may be due to the pausing, scaling back or postponement of cultural and engagement activity and/or the reduction and furloughing of development staff.



Lockdown's just been back-to-back bid writing, really. So it's changed the balance of the prospecting model. ...it gives you no time to do any of the individual face-to-face giving. So obviously that can't much happen at the moment anyway. But it does take you away from contact while you are spending time maintaining other relationships.

— 'Interviewee FR2'

The role of social media use before and during COVID-19

Key statistics

- The percentage of organisations using social media very often increased from **12%** prior to COVID-19 to **25%** during the pandemic.
- **7%** of organisations now say they use social media extremely often, whereas **no** organisations said they used it to this degree before COVID-19.
- The proportion of organisations who said they used social media infrequently has also fallen, from **35%** before COVID-19 to **18%** during the pandemic.
- The percentage of organisations who say that they never use social media during COVID-19 has fallen marginally, from **26%** before COVID-19 to **25%** during the pandemic.

Key findings

A larger proportion of arts and cultural sector organisations have been embracing social media since the beginning of the pandemic and the lockdown.

Fundraisers produced more social media content focused on fundraising.



We needed to put it bluntly. We needed the social content, so I said, well, let's just make it fundraising. ...talking about how you know what a difference fundraising is making to us at the minute; how it's basically ensuring our survival.

— 'Interviewee FR4'



Fundraisers reported that they felt a shift in the way their organisation communicated their charitable aims through social media, creating stronger charitable narratives, rather than transactional narratives, than before:

“ We promoted our campaign very widely on social media because we saw two objectives for that campaign: 1) it was to raise funds, and 2) it was also an education piece to show people that we are a charity. Most people saw us as a theatre first and a charity second, and some people do not see us as a charity at all, so that was widely publicised on Instagram, Twitter, Facebook and LinkedIn. — ‘Interviewee FR6’

Donor strategies

Key statistics

- **65%** of organisations said they were providing their donors with access to online activities.
- **35%** of organisations said they had not been doing anything different from usual.

Key findings

There was a shift among arts and cultural organisations towards harnessing digital to engage with their donors, reflecting the findings outlined above.

Organisations reported that they were engaging more with their donors and building stronger relationships.



[A digital meeting] has been a really good way to connect with people, and in fact people with whom we would ordinarily have had a bit of trouble scheduling in a meeting because they are so busy, they will squeeze in an online call.

— 'Interviewee FR5'

Many tried new approaches and have moved away from focusing on what worked in the past.

Donors accessed online activities such as streaming of films and plays, private events, Q&As with the artist, and meeting beneficiaries.

Activities were informed through organisations speaking more to their supporters and finding out from them what they would be interested in.

“ We do not have any show to promote ... it gave us a chance to do some creative learning projects ... and put our community work out in the forefront of the conversation [with supporters].

— ‘Interviewee FR6’

One in four survey participants reported that they were not doing anything different. This was mainly by organisations with smaller turnovers, fundraising incomes and staff levels.

“ It’s not actually really financially viable to do that. It costs more than it makes. And to be honest, we’re a really small organisation. We just don’t have the tech to support that kind of thing.

— ‘Interviewee FR4’



Prioritising existing donors and existing relationships

Key statistics

- **54%** of organisations said they were mainly focusing on existing supporters.
- **38%** of organisations said they were focusing on a mixture of existing and new supporters.
- Just **6%** of organisations said they were focusing primarily on new supporters.

Key findings

Overall, many arts and cultural charities did not make new asks, nor reached out to new audiences, but instead prioritised existing supporters.

Many strategies were based on retention rather than growth. This was most prominent with two groups of donors: major donors, and charitable trusts.



We haven't sought new sources of income because of the uncertainty of the present situation.

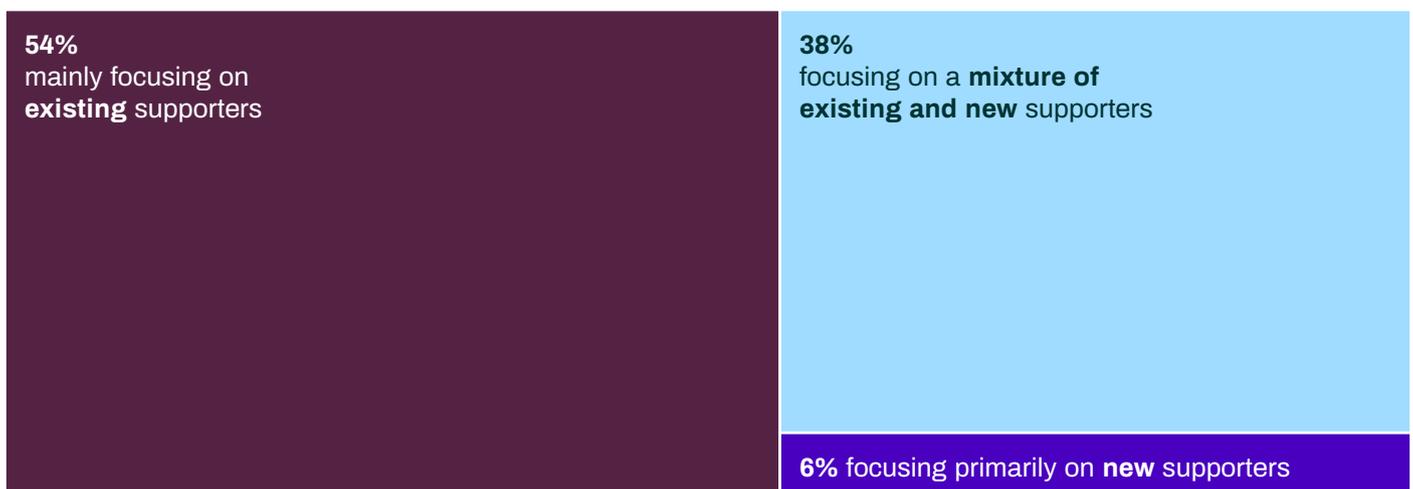
— 'Interviewee FR7'



[We're] relying on the kind of goodwill and commitment of our existing donors.

— 'Interviewee FR4'

Chart 3: Changes in supporter focus



Fundraisers reported keeping those groups up to date with news and developments, often beyond their usual funding commitments or grant agreements, which enabled a stabilisation of relationships and continuous giving.

Focusing on existing donors proved to be a successful strategy, with **54%** of fundraisers reporting that this renewed their understanding of relationships with their supporters.

“ Throughout this entire period, not having anything to offer our members was for us a really interesting exercise in testing their loyalty, because they enjoy their benefits, as much as they are. They’re clearly not driven by those, and so that was really heartening to understand, for actually more of our individual supporters than we had realised. There’s been a really steady position in those memberships – from £250 up to the £10,000. Same with major gifts. We’ve seen good stability there.

— ‘Interviewee FR15’

“ The renewal rate we usually have amongst our patrons – people giving above £600 – is probably about 85%. It’s currently 60%, but I had projected 40% after the pandemic, so I’m quite pleased with that.

— ‘Interviewee FR7’

New fundraising appeals, approaches and targets

Key statistics

- **55%** of organisations said that their new approaches had either met or exceeded their expectations.
- Just **9%** of organisations said their new approaches had not met their expectations.
- **36%** of organisations said that they have not introduced new fundraising appeals or approaches.

Key findings

Fundraisers who did reach out and acquire new and regular donors reported that this was mostly at a lower giving level.

Fundraisers expressed excitement and surprise at exceeding fundraising targets for appeals.



[We] set a very modest target of £10,000. ...it hugely exceeded what we thought it would. And that's from doing the direct marketing digitally.

— 'Interviewee FR4'

Interviewees reported a concern about launching appeals due to the public attention on health, direct crisis support and the NHS, and whether arts and heritage was a legitimate cause to promote.



At a time, support for the NHS was really ramping up and with Clapping for Carers on Thursday night, we saw the arts take a back seat in the media.

— ‘Interviewee FR6’



I suspect cultural fundraising for projects other than keeping theatres/ museums etc. open will be very hard, and will be even harder for small charities. I would expect trust grants to stay focused on food banks and other emergency funding, which is clearly going to continue for at least 12 months in view of the predicted unemployment levels.

— Survey respondent

However, as the pandemic continued, an increased confidence and public awareness around its impact on the cultural sector inspired fundraisers to launch appeals over the summer.

PART 3: GOVERNMENT SUPPORT

Key statistics

- **64%** said financial support into 2021 and beyond was very important to the survival of the sector.
- **89%** said supporting organisations unable to access emergency funding was important.
- **79%** said continuation of the furlough scheme was important.

Key findings

Fundraisers noted the lack of support for the freelance industry:

“ A massive new subvention [government funding] is needed to support freelancers and in particular the performing arts venues, because they are the hardest hit of all of the sectors of the economy.

— ‘Interviewee FR1’

Fundraisers reported a lack of understanding by the government about the value of the arts and cultural sector to society and in terms of the economy:

“ I think the government doesn’t quite understand the importance of the arts. I loved Sonny Freeman’s article saying it is a vital industry with special skills, and it should be saved. It’s just so hard at the moment because there are so many industries that are really struggling, with so many people struggling.

— ‘Interviewee FR13’

The survey highlights that there is a notable contingent of organisations which currently falls between the gaps of the Government support made available i.e. micro to small organisations which have not met the threshold to apply to the Culture Recovery Fund.

PART 4: WORKLOAD, JOB SATISFACTION AND CAREER PROSPECTS

Key statistics

- Before COVID-19, on average, job satisfaction among respondents was rated at **8 out of 10**.
- During the pandemic, on average, job satisfaction among respondents was rated at **6 out of 10**.

- **65%** of respondents said they see themselves working in the arts and culture sector in the long term.
- **11%** said they see themselves working in the arts and culture sector in the short term.
- **22%** said they didn't know.

- **63%** of respondents said their workload had increased.
- **17%** of respondents said their workload had decreased.
- **20%** of respondents said their workload had remained about the same.

Key findings

Stress, a growing disconnect between fundraising and organisation's delivery of their principally digital cultural offer, and the increased challenges of working from home have led to decreasing job satisfaction amongst cultural fundraisers:

“ Stress really... Just the relentlessness of fundraising and knowing that it's becoming increasingly competitive... I think it's more about that and the relentlessness, you know – literally, just get one application in and then you are working on the next one. ... I don't enjoy my job any the less, I really love what I do. But yes, it'll help if we could get back to having a bit more balance.

— 'Interviewee FR3'

“ I was just treading water, and I wasn't asking for money really. I was just processing renewals with my team, and it was very unsatisfying. But I think the key thing that was lacking at that point – and what makes me love my job and give this score an 8 – is the connection between what we as an organisation produce artistically and how we fundraise against the targets for those things. So that is integral to the work on the stage, my fundraising is absolutely connected to that.

— 'Interviewee FR7'

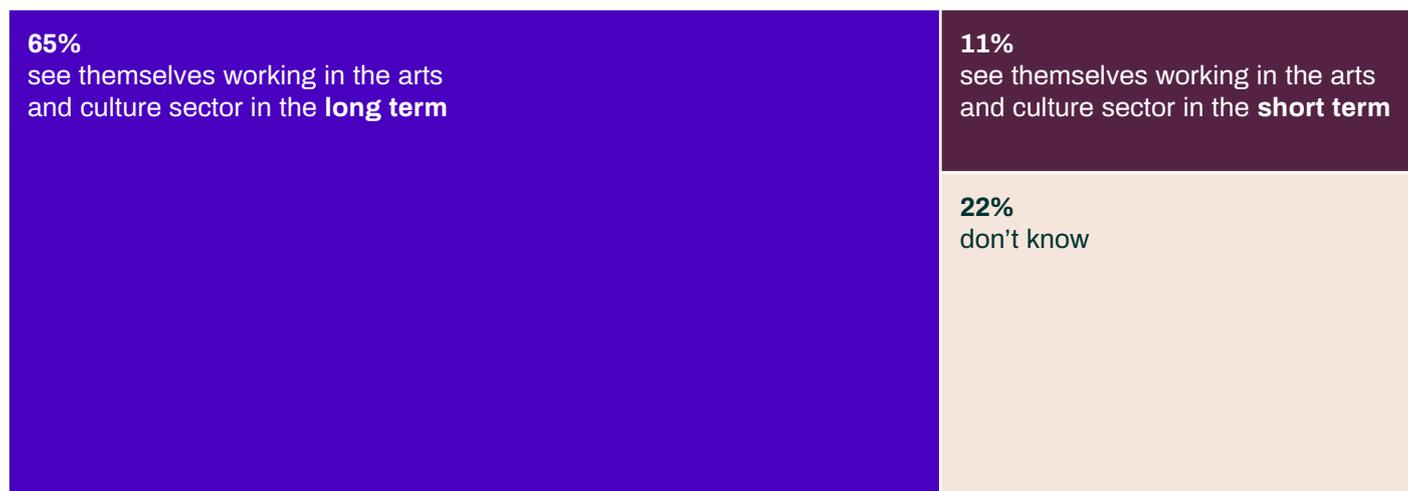
“ I've been off with RSI for a couple of weeks, you know, from too much typing. I'm not blaming the employer at all, but I think it's something that you want to feed into this discussion. You may have any other people say this sort of thing, but I would say in terms of my health, it's taken a toll. Definitely, it's just working relentless long hours, stuck at a desk.

— 'Interviewee FR2'

“ I was shielding. I didn't leave my house from March to July 2020 so that was unpleasant and not great. I am also very extroverted. I need people – I need to be with people, so I think my mental health has been affected.

— 'Interviewee FR9'

Chart 4: Longevity in the cultural sector



Despite the challenges of working in arts and heritage during the pandemic, fundraisers want to continue their involvement in the sector. However there is a significant proportion of fundraisers (35%) who see themselves moving away from the sector longer term.



I think that is down to just the workload that I had, but it's getting better now. We've kind of come through that now. There was a period of about four months, where it was just intense, and I'm partly thinking that was self-inflicted. I wasn't as good at turning off my computer at the end of the day and saying: 'Right, I should stop work.'

— 'Interviewee FR8'

Several interviewees reflected on new skills gained, which included:

- agile and fast responses, both internally and externally;
- greater understanding of analytics and other digital skills;
- processes for crisis fundraising and tools for storytelling; and
- managing teams and change remotely.

These were complemented by the range of online and mostly free training opportunities, online networks and webinars made rapidly available to cultural fundraisers.

The survey revealed stark future challenges including a loss of talent, lack of job progression, increased pressure and pay freezes:

“ The pressure on fundraising teams during this period has been immense. When there is no ticket or trading income coming in for an arts organisation, there is increased pressure on fundraising to ‘save’ an organisation or stop people losing jobs.

— ‘Interviewee FR11’

“ I have been an arts fundraiser my whole career... I am concerned that salaries will be permanently lower and won’t be able to compete with the rest of the charity sector. Many people have taken significant pay cuts. We may lose key talent and fail to diversify as a sector.

— ‘Interviewee FR17’

“ There will be a huge loss of talent from cultural fundraising while arts organisations are run down over the coming years – redundancies and no job progression will force people out of the sector. There is a risk of the sector becoming less diverse owing to lack of opportunity or progression.

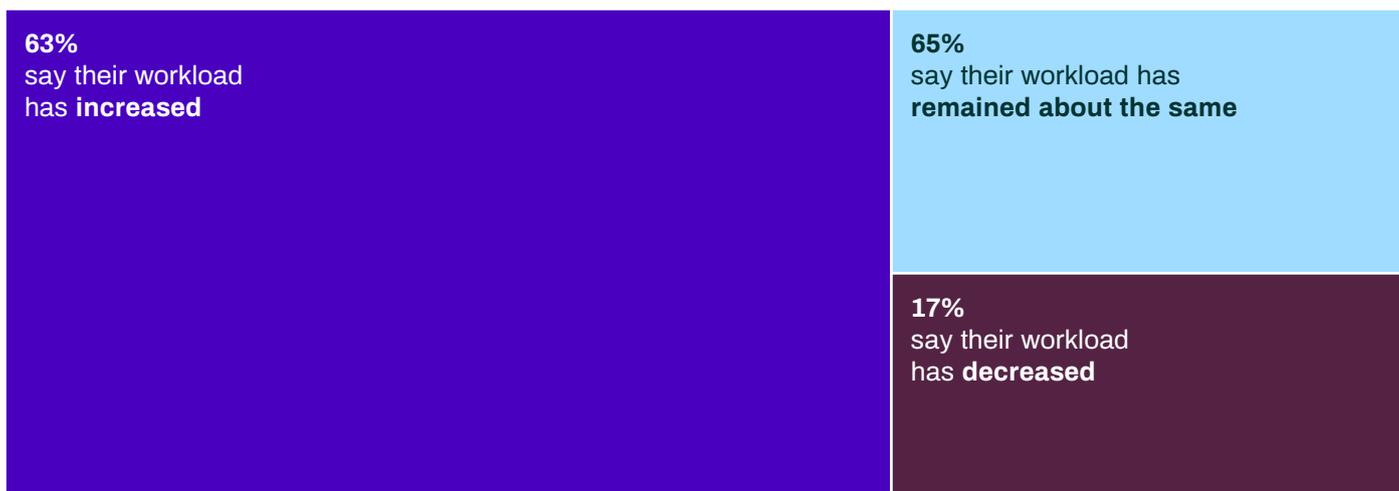
— ‘Survey respondent’

The workload has been challenging for fundraising leaders in the cultural sector. Changing guidelines, quick decision making, reduced team size, fast turnaround of emergency applications and appeals, and looking after team wellbeing were some of the key challenges cited by interviewees as a result of the pandemic:

“ From a leadership perspective, I’ve got to learn millions of things just about how to manage my own wellbeing, whilst also feeling responsible for other people. Because it’s very easy, I think, when you’re in a leadership role, to really take on all of that responsibility. I’m happy to do it, I enjoy managing people – it is one of the best parts of my job – but I’m also going through a lot of personal stuff, as we all are. And so I find I am still learning how to be present and empathetic and supportive, but also to know when I need to switch off and look after me, out of hours. I think it’s been a really important learning.

— ‘Interviewee FR15’

Chart 5: Scale of workforce



“ I’m part of the senior leadership team, so we were responding to government guidance which was frequent and changed frequently. So we were having to reassess our policies and assessments and activities, at the same time as innovating, having to tear up a lot of our plans, and start again. Normally you would have one or two new fundraising products in a year, and you test them and try them out, and then you may roll them out. But this time everything was new and very fast paced.
— ‘Interviewee FR5’

Fundraisers reported that a few working changes, particularly with regard to flexible home and virtual working, are likely here to stay:

“ It’s saving a lot of time to do Zoom calls. I mean, I’d never even heard of Zoom. I’d never done Google Meets or anything like that before the middle of March 2020. And from this point on, I’m never going to do coffee meetings. It’s just such a waste of time getting there, when you can just do it over Zoom. I think that will change forever. You know, people aren’t going to be going out for coffee meetings!
— ‘Interviewee FR3’

THANK YOU

In April 2020, the original idea was proposed to the Chartered Institute of Fundraising by Melanie Stoutzker of the RAISE Steering Committee and Dr Marta Herrero of the University of Sheffield.

A collaboration between both organisations resulted in an agreement to deliver the work jointly, and the survey questions and structure were agreed by both teams.

The Chartered Institute team was led by Dan Fluskey, Head of Policy, working alongside Martin Kaufman, Chair of the RAISE Steering Committee and RAISE Committee members Melanie Stoutzker and Penny Canepa-Anson, and with CSN's Co-Chair Dana Segal and CSN Vice Chair Kane Moore.

The University of Sheffield team was led by Dr Marta Hererro, Lecturer in Creative and Cultural Industries at the Management School, working alongside Dr Hossein Olya, Senior Lecturer in Consumer Behaviour and Director of Research Development for Marketing and Cultural and Creative Industries, and Dr Simone Kraemer, Senior Development Officer at the University of Kent.

Together we are the future of fundraising

We champion our members' excellence in fundraising. We support fundraisers through professional development and education. We connect fundraisers across all sectors and skill sets to share and learn with each other. So that together we can best serve our causes and communities both now and in the future.

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