



Chartered
Institute of
Fundraising

SUPPORTER EXPERIENCE

FUNDRAISING IN THE TIME OF COVID-19

How the supporter experience can help you navigate the pandemic



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FOREWORD

We are all living in extraordinary times, both professionally and personally. No-one has been exempt from this turmoil, while at the same time we know that some are being more severely impacted than others, generally those already facing more obstacles to living a healthy and fulfilling life.

At the same time Covid-19, and particularly the start of the pandemic, was devastating for fundraising. And just as we thought we were beginning to return to a new normality, things are getting progressively worse again. No-one can predict what the future holds.

The services, activities, campaigns and research provided by the UK's causes are at the same time dependent on fundraising. That places a huge responsibility on every single fundraiser although, of course, there is a limit on what we can do both personally and collectively.

The Chartered Institute of Fundraising doesn't by any means have all the answers. However, our Supporter Experience special interest group has spent considerable time looking from their perspective at the challenges we face, and potential approaches. How can we think about our supporters as partners to help us achieve our shared goals?

Many people with a great deal of fundraising experience have given their time and energy to create this guide. It provides practical advice which we believe will help you, your organisation and most importantly your cause.

There are mountains to climb. But these principles and advice can perhaps be a helpful guide to the approach you take, provide additional sustenance on your ascent, and support your every step to the summit.

Happy and fruitful reading.



Peter Lewis
Chief Executive
Chartered Institute of Fundraising

WELCOME!

This document is designed for fundraisers by fundraisers. You might be a chief executive of a small charity personally responsible for fundraising and facing increased demand for your organisation's services. You might be a director of fundraising of a large charity with a reduced team now working from home again. You might be a frontline fundraiser wanting to deliver a great supporter experience with very limited resources. We hope we have something of value for you all.

This Chartered Institute of Fundraising resource has been produced with the Supporter Experience special interest group.¹ It's been reviewed by fundraisers in a range of roles from large and small organisations, across different sectors. Its foundation is the work of the Commission on the Donor Experience² and it aims to offer practical suggestions on how to keep the supporter experience at the forefront of your fundraising in the extraordinary times we all find ourselves in.

“Something extraordinary is happening – supporters are responding in unprecedented ways.”

The coronavirus pandemic is affecting all of our lives in ways unimaginable even one year ago. And it's affecting our supporters' lives too. As we write – in late October 2020 – the challenge of Covid-19 is rising not diminishing and the future is deeply uncertain.

It's already been a turbulent year for fundraisers – and it's far from over. However, something extraordinary is happening – supporters are responding in unprecedented ways. Through the Supporter Experience group we're hearing about record appeals and exceptional generosity, and supporters are going to extraordinary lengths to fundraise, despite cancelled events. Why? The pandemic has heightened people's desire to do good, because doing good helps them feel better.

We believe that there is an opportunity for fundraisers to harness this rise in altruism – providing we deliver an exceptional supporter experience that reinforces each and every supporter's decision to help. And, if we get it right, it will make a lasting difference.

1 For more information see: <https://ciof.org.uk/about-us/groups/supporter-experience>

2 Available at: <https://sofii.org/cde/the-commission-on-the-donor-experience>

We are not suggesting we have the answer to all the challenges charities are facing. And neither are we suggesting there is one right answer to delivering supporter experience. But through the six principles and suggested actions provided in this resource we hope to help fundraisers do their part. We're delighted to include examples and stories from a range of organisations that demonstrate what is possible. We hope they will inspire you and your organisation.

The supporter experience can be defined as the way a supporter *thinks* and *feels* about your organisation: the sum of every interaction from asking to thanking and beyond; everything you say and do; every time you talk or are quiet; every time you disappoint or delight.

“ Now more than ever, delivering an exceptional supporter experience is *the* key to building long term relationships.

Powerful fundraising inspires people to make a difference by giving and feeling good about giving. Organisations are responding in new, innovative ways. Find and share the stories of how your organisation is making a difference. Inspire your supporters to play their part in your solution by offering them opportunities to give and support. We know from the Commission on the Donor Experience that people who have a good supporter experience are more likely to give, give more and recommend others do the same. Now more than ever, delivering an exceptional supporter experience is *the* key to building long term relationships. Our new touchstones should not be just 'satisfied' but **needed, valued and empowered to effect change**.

“ If we only focus on the money we will damage the experience. If we focus on the experience the money will follow.

Now is the time to accelerate investment in the supporter experience. At every touch point, ask what experience is the supporter having right now? Then give supporters the experience **they should be having**. It is easy for us to fall into the trap of focusing on the money. If we only focus on the money we will damage the experience. If we focus on the experience the money will follow. So, the challenge is to orient ourselves to the experience, despite the pressures.

At such a time of crisis it would be easy – and understandable – to put things off. But this is not a nice-to-have approach to get round to when things are back to normal it's a fundamental that can help you leverage the rise in altruism. **Now is the time.**

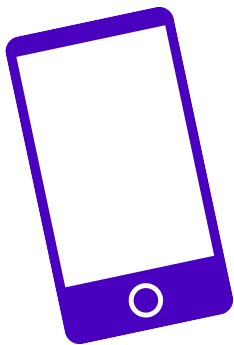
PRINCIPLE 1: IT'S ABOUT THEM, NOT YOU

Start with the needs of your supporters.

Delivering a great supporter experience begins with meeting the needs of supporters: delivering what they want to have, not what you want them to have; listening to them rather than talking at them; responding to their likes and their dislikes.

But it's easy, and understandable in crisis, to become internally focused and to switch to the needs of your organisation. Resist and keep doing what is right for your supporters.

Actions



1

Carry on talking to your supporters – they expect to hear from you, and there are opportunities to create closer relationships than ever before. Try proactively calling a donor who has recently given, to personally thank them, ask them how they are, and understand why they chose to give to you now. Consider asking your senior team and trustees to do the same. Ask those who get involved to share their anecdotes, as this will help build confidence that people still want to give despite, and possibly because of, what is happening.



2

Show your supporters that you care about them. They will appreciate that you have taken the time and thought to do so. Reinforce that their safety and wellbeing matters. Supporters' lives have been impacted by coronavirus in numerous and unexpected ways. Understanding their hopes and fears will enable you to shape persuasive communications that tap into their motivations for supporting you.



3

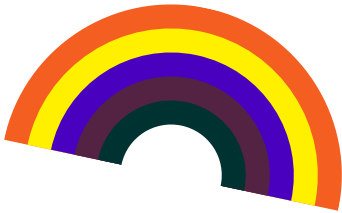
Build opportunities to understand your supporters' 'why' – their story is the most important piece of insight you can gain. You might consider surveys or focus groups; a question on a response form or Zoom calls with high value supporters – each carefully designed to understand why supporters are giving to your organisation at this moment in time and how your cause relates to their values and beliefs.

4



Create opportunities to listen to supporters and create a feedback loop, emphasising that you value input especially because you can't meet supporters in person right now. Match supporters needs and interests with your offer – ask about them, their needs and interests and then adjust. But be careful to balance what people say and what they do – people often say they do not need to be thanked but we know that thanking is critical because it meets an often unstated need to feel valued and appreciated.

5



Focus your communications on your impact. Think about whether your internal situation – possibly cuts to services and staff redundancies – is relevant or not to your supporters. For example, if you are in danger of closing or radically reducing your services, it will be highly relevant.

6

Help people feel part of something bigger. We saw the power and sense of community this created during early lockdown. In your communications consider how often you put across the idea of 'you and us together' rather than saying 'we' or the equivalent, such as your organisation's name.

COMMUNICATE WITH YOUR REGULAR GIVERS

As pressure on individual pockets may increase, how can you ensure supporters feel their donation is still of value to them? Here is how Great Ormond Street Hospital Charity responded at the outset of the pandemic.



Jennie Sullivan

Senior Individual Giving Manager, GOSH Charity



We quickly realised regular supporters would be a vital source of income for the hospital both in the immediate response and in dealing with the consequences the pandemic would have over the longer term. This was how we adapted to keep their support.



**GREAT
ORMOND
STREET
HOSPITAL
CHARITY**

We decided the primary objective of the communications plan was to keep supporters updated and to safeguard these vital regular gifts.

We put stewardship first

The first communication sent to regular givers was an update on how the hospital was responding to the immediate challenge from the pandemic. It talked about how important their previous support had been in allowing us to act quickly and how important their support would be over the course of the pandemic.

We recognised that for many supporters this was an extremely difficult time for them personally, but we also understood that their donation to us was a way of taking control at a time when there was little they were able to control.



87%

RESPONSE INCREASE ON THE
PREVIOUS DIGITAL CAMPAIGN

“Thank you for sending me the video of Gabz and her mother. I was so moved I am going to increase my Direct Debit donation to you. Kind regards and stay safe.

— GOSH Charity supporter

20%

FEWER SUPPORTERS CANCELLED
THEIR REGULAR GIFT IN
APRIL–AUGUST THAN IN THE
SAME PERIOD LAST YEAR

Offering opportunities to give more

After careful consideration, the decision was taken to go ahead with a digital and telephone upgrade campaign planned at end of March. The digital campaign was the highest responding digital upgrade campaign the charity has ever undertaken, an increase of 87% on the previous campaign, and the telephone campaign beat its response target by 21%.

Keeping up our ongoing stewardship

As part of the hospital response to the pandemic, the number of people allowed in the hospital was significantly reduced in line with infection control guidance – therefore it was not appropriate for fundraisers to be with families in the hospital filming their stories. Instead we asked our patient families to film themselves and send the files to us. We received some amazing footage, to send to our supporters to keep them engaged with our cause. As one supporter responded: “Thank you for sending me the video of Gabz and her mother. I was so moved I am going to increase my Direct Debit donation to you. Kind regards and stay safe.”

We provided a mechanism for supporters to send messages directly to the hospital's frontline staff, displayed within the hospital itself. The messages were deeply moving and very much appreciated by the staff. In return many staff at the hospital filmed ‘thank you’ messages to be sent to our supporters.

Was this the right approach?

We implemented the programme in the last week of March as we could see cancellations rising in the previous weeks. Since then, month on month our attrition has been falling. Comparatively 20% fewer supporters cancelled their regular gift in the period April to August than in the same period last year. We remain incredibly grateful to our supporters for their generosity at such a challenging time.



What specific communications could you be sending to your regular givers at this time?

CONNECT YOUR CAUSE TO YOUR SUPPORTERS

At the outset of lockdown the Chief Executive of Child Rescue Nepal sent a message out to their supporters saying: “We are thinking of you – you mean so much to us and we are deeply grateful for that support and we would like to return that support as best we can.”

Even offering a chat. They then started Zoom calls with supporters, including their programme staff in Nepal. It’s helping bring supporters closer together to the work of the charity.



Jo Bega

Chief Executive, Child Rescue Nepal



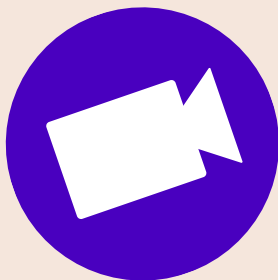
We started Zoom calls with supporters one month into lockdown when it became clear that emergency aid was going to be needed in Nepal.



**CHILD
RESCUE
NEPAL**

We did another one about six weeks later.

Most people showed their faces and everyone introduced themselves and their connection to the charity – just one line. It built community and encouraged everyone – supporters, trustees, as well as staff in Nepal. Along with donors, staff in Nepal were hugely encouraged too to see that all of these people really cared.



I think they worked because of our ‘are you OK?’ emails sent at the beginning of lockdown, and because the older generation had been forced into the technology by families and friends due to lockdown.



£3.5K

ONE SUPPORTER WAS
SO MOVED THEY DECIDED TO DO
A FUNDRAISER FOR US, RUNNING
THE HEIGHT OF EVEREST AND
RAISING NEARLY £3,500

We had a great response to both Zoom calls – a trust that hadn't given for over a year gave a grant straight away of €4,000. A corporate partner had their son watching. He was so moved that they decided to do a fundraiser for us, running the height of Everest and raising £3,463. Other people donated straight afterwards.

When we've done another rescue to free children held captive in forced labour, we will get the staff to talk through that.

Some people just can't travel to Nepal – ever – so this is bringing the work a lot closer to them.



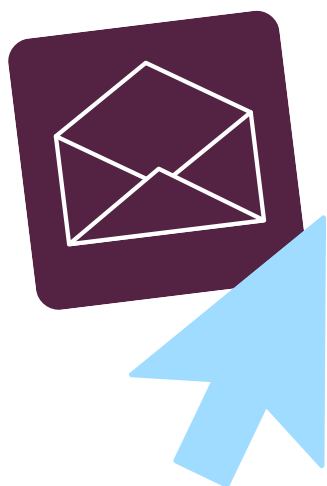
How could you use Zoom and similar platforms to help connect with supporters at this time?

PRINCIPLE 2: THE MINDSET YOU HAVE REALLY MATTERS

Enhancing the supporter experience should be an aspiration of the whole organisation – a mindset to see supporters as partners in your mission, rather than people to fundraise from.

If the pervading mindset is not focused on the supporter experience you could easily take the wrong direction, make the supporter experience worse and directly impact your income.

Actions



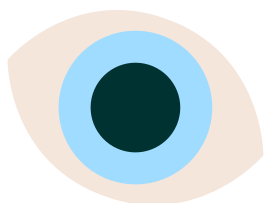
1

Keep your current schedule of communications on constant review. The world is rapidly changing so you need to stay relevant. As needed, re-imagine your communications considering the experience you want your supporters to have, right now, given the uncertainty about where Covid-19 is going. Remember they are partners in your mission, when the work of fulfilling your mission is under threat. Fundraising is not about persuading people to give to your organisation. **It's about inspiring people** to want to make a difference to the world at this awful time, by giving to your cause and feeling great about it.



2

Consider every person on your database(s) as a potential partner in the mission. Some won't be. Many will, even if you haven't thought about them in this way before. Focus on them. Be careful about your approach. Your most engaged donors will need different communications than someone who signed up to an event that didn't take place, for example. Where you have supporters not on your database (e.g. shop volunteers) make efforts to find them.



3

Persuade your senior team and trustees of the importance of supporter experience and show them that extraordinary sums of money can be raised, if the organisation's mindset is right. Engage with your chief executive. Perhaps ask a trustee to become your supporter experience champion with an item on each meeting agenda? The supporter experience is a tool for you to manage up as well as down.

4

Try to find out how satisfied your supporters are. Read the communications sent to, and received by, your different types of supporter. Listen to outbound and inbound phone calls. Consider pulling together a number of supporter panels, if that's realistic. Listen to those panels and respond to the insight they give you.

5

Quickly, review the processes that relate to dealing with supporter feedback and responding to supporter complaints. There isn't time for a full review on every touchpoint. But you might be able to make quick changes to the key moments that matter. Focus on making the ones that are most important to the supporter great. Remember your back office is just as important as your fundraisers in determining the supporter's experience.

RESPOND TO YOUR SUPPORTERS' NEEDS

A supporter of Guts UK was determined to fundraise despite his own financial situation. But how could he recognise the support from his friends?



Julie Harrington

Chief Executive Officer, Guts UK



A young person with limited means ignited his amazing friends to do the Three Peaks Challenge in memory of his mum. His friends' support helped him so much through the loss of his mum. They set up an online page and raised £2,430 for Guts UK.

But he didn't have the funds to provide medals to each of his friends for what they had helped him achieve and say thank you. So, we made sure all of his friends were recognised, arranging medals and heartfelt thanks.



Are you spotting the needs of your supporters and then doing something about it? How can you enable your staff to think creatively and go beyond the usual to make those that donate and fundraise for you feel valued and special at this time?

IT'S NEVER TOO LATE TO ADOPT THE RIGHT MINDSET

Over two years ago Anthony Nolan started adopting a new approach with their marathon runners to give them a better supporter experience.

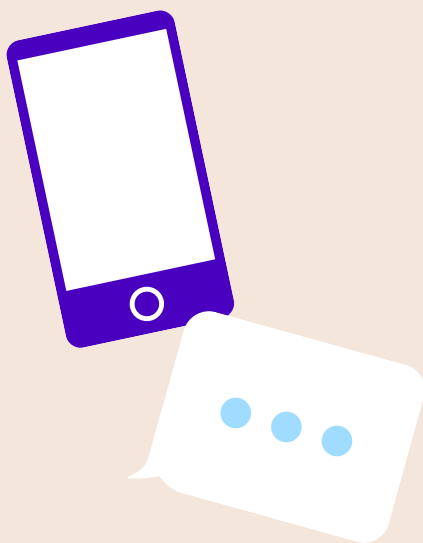
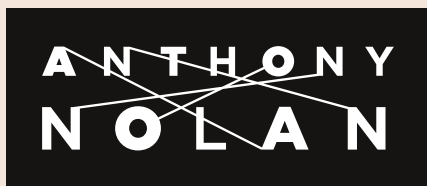


Rosie Short

Events Manager, Anthony Nolan



Back in 2018 we set up a Strava Club for the first time for our London Marathon runners to make them feel like more of a 'team' and foster a greater connection to the charity. The runners shared training and fundraising tips, but what surprised us was the strong connections they built with each other. Many shared their deeply personal reasons for fundraising for the charity and the messages of support they received from each other were inspirational. By the time the London Marathon came around, the runners had organised their own WhatsApp group and arranged a pre-race meet up. The WhatsApp group is still going strong today.



This core group of connected supporters made up some of our top fundraisers that year. Beyond their value as fundraisers, we recognised that they had so much more potential through other channels, including press and awareness raising. We introduced them to other contacts at Anthony Nolan who they could work with to share their story – we were no longer their main contact and fundraising was no longer the way they were supporting the charity.

We made a point of speaking to each supporter through the platform they spent most of their time on, from social media channels to the phone, making us more accessible and be counted on to advise and support them.



We did worry that we might lose these supporters as fundraisers, but in fact, finding an outlet for them to support Anthony Nolan in the way that suits them, has only helped to deepen their loyalty. Even when someone was not actively fundraising for us, we kept in touch with news tailored to each one. We soon found that they came back to the fundraising team to ask us, 'what can I do now?'.



We've not always got it right. Putting the charity's needs before the supporter's and asking them to take part in an event we needed to fill places in just didn't work. Working closely with each supporter we were able to identify their wants and needs. One galvanised a team of new supporters to take on the London Landmarks Half and persuaded a group of the 2018 Marathon Runners to join her at the Royal Parks Half Marathon.



When the pandemic hit, this group of supporters saw our emergency appeal messaging and immediately came to us to explore ways they could raise funds. Two of the supporters have gone on to recruit a whole team of friends, family members, donors and recipients to climb Kilimanjaro, raising over £22,000 to date with the event postponed to 2021.



When we shared our new virtual quiz they jumped at the chance to get the old team together to raise funds, raising over £1,200. We attended their quiz and as a thank you, invited them to an exclusive webinar on our response to the pandemic. Shortly afterwards, the team organised another fundraiser for us, virtually running the distance from Land's End to John O'Groats, while others did a virtual Three Peaks Challenge, together raising over £2,100.



The group even surprised us with their own inspirational video, sharing their motivations for fundraising for Anthony Nolan and encouraging others to support us at this critical time.³ The mindset we adopted two years ago is paying dividends now.



It's never too late to start adopting a mindset to give your key supporters the best possible experience that will serve you well both now and in the future.

3 Watch the video: <https://www.youtube.com/watch?v=ZmOzuvyEvPg>

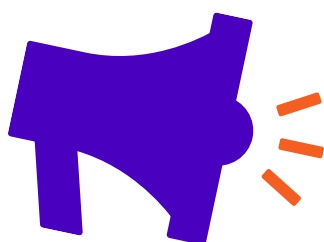
PRINCIPLE 3: YOUR SUPPORTERS STILL BELIEVE IN YOUR MISSION – AND THEY WANT TO GIVE

Your organisation's need just got bigger because of coronavirus.

You may think that supporters are only focusing on themselves, but they need to give. The pandemic has heightened their desire to do good, because giving makes us all feel good. It's something positive to do.

Supporters will go the extra mile for you and give, support, fundraise and influence their networks to do the same and some people will choose to support your work for the first time, if you give them the opportunity.

Actions



1

Be ready to challenge internal assumptions among staff or trustees, that now is not the time to ask supporters to give or fundraise. Now *is* the time. Don't feel the need to hold back on asking supporters to go the extra mile. Many can because they are financially unaffected, or even better off. They are waiting for you to ask them, because they will experience the joy of giving by responding to a request for help where they can make a difference.



2 Tell your supporters what challenges those your cause supports now face as a result of the pandemic. Help them understand the extra demands on your organisation to deliver on your mission. Then tell them how they can help change the outcome for the better. Launch an(other) emergency appeal if you need to. Rather than just say 'we have less money', communicate the impact of less money. Explain, precisely, what change their support can deliver right now.

3 Consider offering supporters a range of new opportunities to do want they can to help at this time, for example, committing to, or even increasing, a regular monthly gift until the pandemic ends.



4 Recognise in your communications some people can't give right now but focus on what supporters can do. Some supporters may not be able to give as much as they would like, because of their changing economic situation. Remind donors what their past support has enabled including your reserves (often funded by past donations) which have no doubt helped see your organisation through this difficult period. Offer supporters who donate regularly a payment holiday. Many will appreciate the gesture even if they don't take it up. It shows you are thinking about them.



5 Think creatively about what your organisation can offer supporters to help them. You might be a health organisation that can naturally offer information, advice, or even activities, that help with wellbeing and keeping fit. You might be an arts organisation that can offer a virtual exhibition or performance. You might be a wildlife organisation that can bring the outdoors to supporters in their homes. What expertise is in your control to offer? Long after this crisis is over people will remember you for helping them see it through.

ENABLE SUPPORTERS TO GO THE EXTRA MILE

The Royal Air Forces Association took the decision to postpone a cycling event due to Covid-19. Then a supporter's passion took over.



Amy Petterson

Head of Community Fundraising, RAF Association



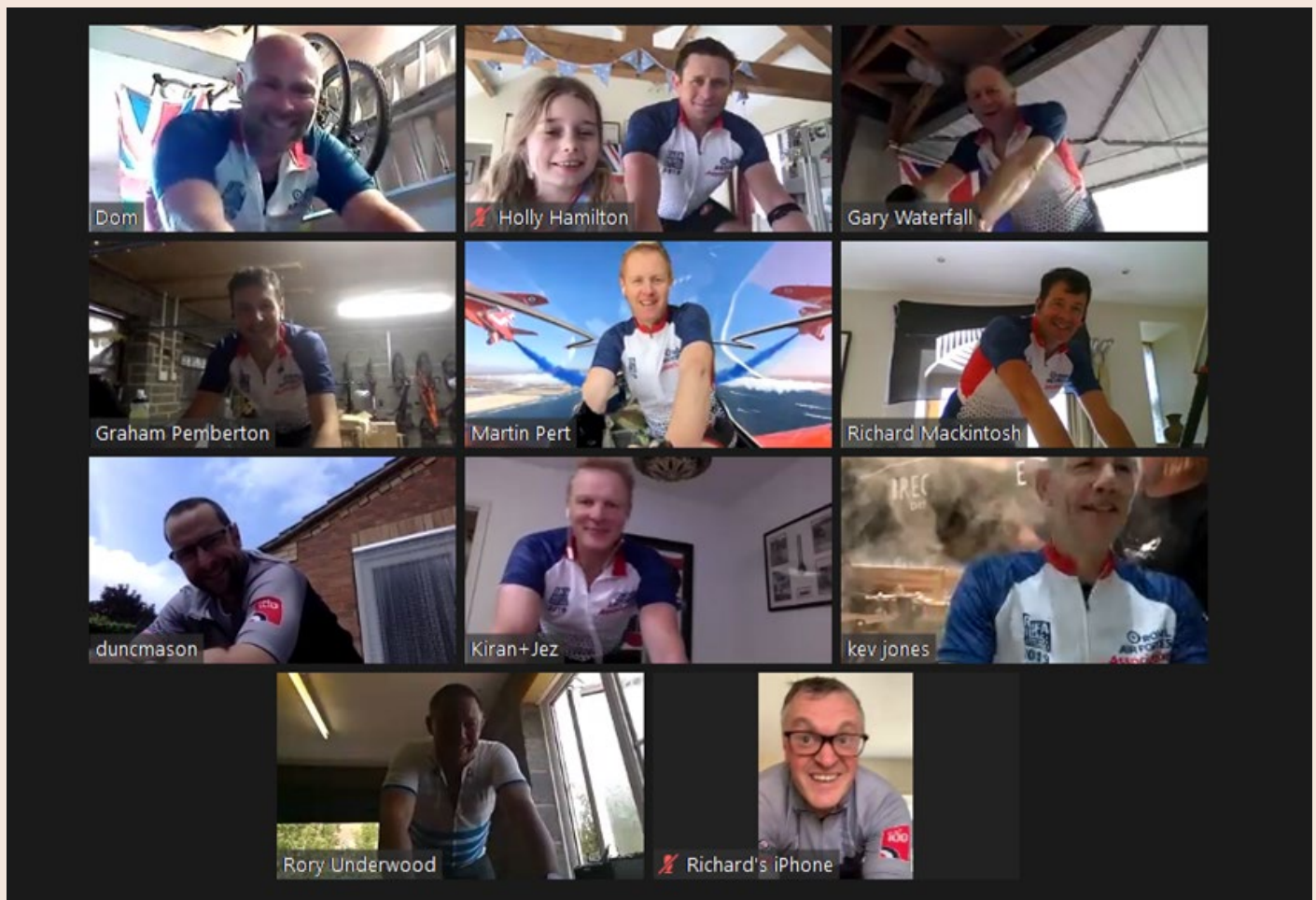
Following the success of our annual cycle event in 2019, we were disappointed to have to cancel the 2020 event due to Covid-19. But one of our incredible supporters and ambassadors didn't think that was good enough.



What started as a small idea of his to do the event virtually, rapidly grew to an event that doubled the attendance of the 'actual' original event, and smashed any fundraising target that we might have put into place.

We worked with what our supporters and audiences were telling us, we tied the event to a cause, a need, and an urgent demand, and we talked about the impact that they were having right there.





RAFA RIDES: 2020

200%

THE VIRTUAL EVENT HAD DOUBLE
THE ATTENDANCE OF THE ORIGINAL
IN-PERSON EVENT

This event was very much lead and directed by what we were hearing from supporters. For example, when we approached a senior contact in the Royal Air Force with the initial small-scale idea, they suggested that we went out to RAF stations to get involved and volunteered a project officer to support this. As a result of implementing their suggestion we started recruiting teams and so it grew.

Powered, guided and lead by a volunteer, we have been able to create an event, RAFARides: Virtual, that exceeded our expectations, and excelled as a virtual event. It was an incredible experience and we are now looking forward to 2021 whatever situation we face.



**How can you harness the energy of your supporters?
Are you reaching out to them and listening to what
they are telling you?**

GIVE DONORS AGENCY

When the coronavirus crisis hit, Freedom from Torture were days away from launching their annual emergency relief fund appeal aimed at supporting torture survivors living in destitution.



Sam Afhim

Director of Fundraising & Communications,
Freedom from Torture



We knew this was needed more than ever – torture survivors were having to choose between hand sanitiser and food – they had no chance to adapt to this new situation – if all the cheap nappies are stockpiled they can't afford the name brands. We also knew that given the hostile environment policies of the current government our beneficiaries were likely at the bottom of the pile for any extra help from the state.



We felt that it would be wrong not to acknowledge the crisis to our supporters and wanted to be open with them – so at the last minute we added a handwritten coronavirus insert into the mailing from our CEO. The note checked supporters were OK, was open that we were all feeling worried about how unpredictable things were but reassuring them that we would be stepping up our support – with soft ask reflecting the extra need for funds this would cause.

We then realised our planned online fundraiser called 'spare a fiver' was essentially a feel-good micro donation campaign was not going to reflect where we or our potential supporters were at right then.



We removed anything that could look like a gimmick in light of everything we were starting to do to keep supporting survivors. Stuck for what to call the campaign, on a Zoom meeting one of us said – “listen, at this time everyone is just doing what we can.”

#DoWhatWeCan

£25K

THE CAMPAIGN RAISED AS MUCH
IN THE FIRST DAY AS THE SAME
DIGITAL CAMPAIGN HAD OVER SIX
WEEKS THE YEAR BEFORE



Immediate tingle moment – the “Do what we can” campaign was born

It raised over £25,000 in the first day – about the same as the same digital campaign raised over six weeks the year before. The direct mail and digital elements raised a net income of over £300,000.

And there's more:

- Retention rates have improved in comparison to the same period in 2019.
- We have seen the fastest growth in supporters that the charity has had in nearly a decade for two consecutive quarters.
- We are nearly 25% above our full year direct mail budget with our two appeals left to go including our 'traditionally most successful' Christmas appeal.

The feedback from torture survivors, staff and supporters has been incredibly positive

When coronavirus hit we all felt incredibly helpless. Yet one of the key drivers for charitable giving is the agency it gives donors to create positive change. Talking honestly to our supporters and potential supporters about our challenges and giving them concrete opportunities to play a part in overcoming them has helped us to bring them closer to the charity.



Are you giving your supporters the opportunity to donate to help those your work benefits?

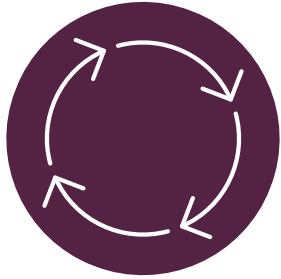
PRINCIPLE 4: DON'T ASSUME YOU ARE PROVIDING A GREAT EXPERIENCE

Donors may be giving despite, rather than because of, what you do. With an exceptional experience they will do so much more.

Actions



- 1** **Keep adapting your communication plans** to stay relevant and fresh. You may have an opportunity to launch an emergency appeal, especially if you have not done so already. Consider adding in more report backs perhaps through your newsletter or however else you provide feedback. As far as possible, adopt one plan across your audiences to keep your messages consistent.
- 2** When you ask for support, begin by **acknowledging that your supporters may not be in a position to help**. Their lives are changing especially as recession deepens. Make it easy for regular givers to give less often or simply to give less and make them feel good about continuing to do *something*. Offer supporters who can't do what they signed up to do – run a marathon or whatever – other ways to become partners in the mission. Don't be afraid to ask for more if supporters are able to give more.



3

Elevate thanking so that it has real impact for supporters.

Send a handwritten letter or make a phone call. Give special attention to new supporters to positively reinforce their decision to give for the first time. You might choose to make your own gift and see your organisation's experience for yourself. If it isn't as simple, easy and fast as you would like, fix it.

4

Communicate as often as you have something relevant to say.

You are probably just one of your supporter's charities so make sure what you have to say is distinctive and adds value for them. Build on the behaviours people valued in lockdown – being kind, taking care of each other, looking out for those in need of support. Now is the time to experiment – your supporters will appreciate your efforts.

5

Step back, reflect and learn from the last six months

– simplify processes, write authentically in real time, remove layers of approval. Keep the things that have enhanced the supporter experience and change the things that haven't.



ACCELERATE AN EVEN BETTER SUPPORTER EXPERIENCE

Facing significant loss in income, St Margaret's Hospice decided to step up their plans for the experience their supporters received.



Michelle Hancock

Head of Supporter Care & Individual Giving,
St Margaret's Hospice



A gold standard supporter experience – it's something we'd been reviewing internally since I joined the hospice two years ago, defining what it might look like and how we could deliver it. But change had been slow to build, and it was coronavirus pushing the UK into lockdown in March that really accelerated a movement at St Margaret's Hospice.



This urgent shift was, to be honest, driven by the significant projected income loss and the direct effect this could have on services in the community. But the benefit to supporters has been clear.

We know how important St Margaret's is to our supporters and community, and that we needed to tell them how the crisis was affecting the hospice – and what they could do to help.

72

WITH AN EMERGENCY ASK
DIGITAL APPEAL WAS LAUNCHED
WITHIN 72 HOURS OF LOCKDOWN
BEING ANNOUNCED

Within 72 hours of lockdown being announced, we launched a digital appeal with an emergency ask. We were open and honest about the income shortfall we faced, and the incredible work our frontline staff were continuing to provide for end of life patients and their families. And that we needed their help to continue this vital work.



THANK YOU!

A SIMPLE FOLLOW-UP CAMPAIGN
SHOWED THE IMPACT SUPPORTERS'
GIFTS WERE HAVING ON PATIENTS
AND FAMILIES LIVES

We wanted to use this moment to reach out to our supporters – but also engage with new audiences right across the county. The key was a consistent message and we developed **#helpyourhospicefromhome**.

It was really important to us that we recognised the impact that lockdown was having on our supporters too, and that depending on their circumstances they might want to give in different ways. So, we were consistently clear that there four simple ways to show support: a donation to the emergency appeal, setting up a regular gift, playing our weekly prize draw or purchasing a packet of our sunflower seeds to grow in your garden.

To make the experience of supporting St Margaret's as good as it could be, we streamlined internal processes to speed up thanking. We picked up the phone and spoke to many of the generous people who made donations, and were able to start a major donor programme as a result. We made the transaction of supporting St Margaret's as smooth as possible – and saw a significant uplift in donations made via our website and over the phone as a result.

All of this was possible before Covid-19, but now there was a compelling reason to make this a priority.

And we made sure that we didn't only ask for support – we ran a simple thank you campaign that showed the impact of gifts for patients and families really struggling with the shielding and lockdown conditions. We've followed this messaging through in our bi-annual supporter newsletter too. For the first time, I can say we really delivered a first-class supporter experience, and formed the blueprint for the way forward.

The results speak for themselves with double the income generated by our previous best appeal, a 33% increase in the average gift size, including ten gifts in excess of £1,000.



Can you use this challenging time to make the case for ramping up the supporter experience and making it first class?

GET TO KNOW WHAT YOUR DONORS NEED

When Covid-19 hit, Starlight's improved understanding of their supporters from a donor survey help shape the fundraising communications so they connected.



Rachel Doree

Head of Individual Giving, Starlight Children's Foundation



At the start of 2020, we were working on a plan to do a donor survey to determine 'the why' of donors to help us understand who our donors are and what we were doing that resonated with them?



The survey went out right at the start of Covid-19, earlier than originally planned, as we recognised that the information we gathered would help position our subsequent communications. From the survey we learnt that the majority of donors haven't actually received direct support from Starlight, but had a strong family bond that was important to them, such as being a parent, grandparent, aunt or uncle.



We now understood that part of their motivation was if anything happened to a younger member of their family they would want Starlight to be there, or having been in hospital themselves they realised the importance of Starlight.



This made us think are we saying right things to them, are we meeting their needs with our communications, and are we engaging them most relevant content? The survey helped us hone in on what supporters connect with as well as drive internal buy-in by giving a core element for our ongoing communications.

The survey showed that there were three fundamental connection points:

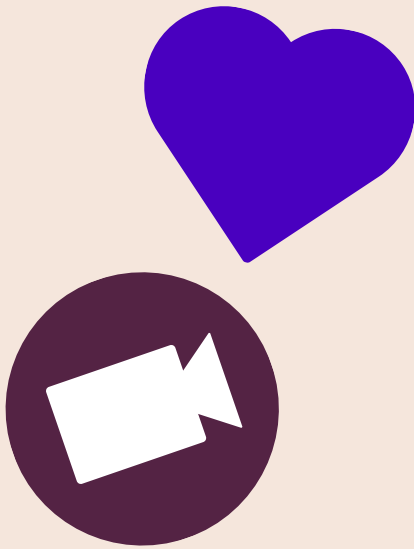
- 1 dealing with the fear when children come to hospital;
- 2 the stress when children come to hospital, and;
- 3 providing support, connection and respite to families.

Our urgent appeal in April exceeded expectations with far higher income than anticipated. This response focused our minds on how we make people feel after they give.

This turned us towards the direct connection between the donors and the beneficiaries, hearing their thanks for themselves and seeing the difference that they are making. We reached out to families to get genuine thank you messages to go out to donors – and those fundraising in the community.

People clearly valued the link to front line. We had a thank you video from a trustee working in children's health, another from a health specialist, and from children themselves. It's the first time we have done thank you videos – it had always been on the cards and we were working towards it, but Covid-19 accelerated our plans as it showed that connection was more vital now than ever before. Our challenge now, which we are already working on, is how we build that same connection with offline donors who aren't contactable by email.

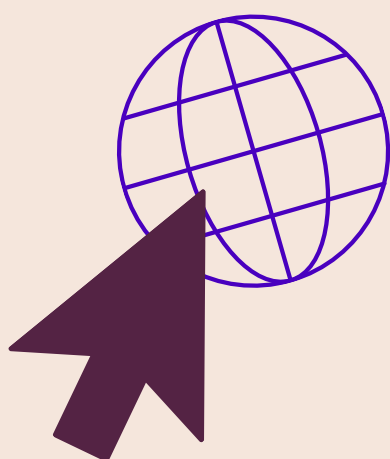
The repeat giving has completely blown our minds. Our appeals in both June and September have consistently hit and excelled targets.



How could improve your understanding of your donors? Have you thought through what they might be feeling when you contact them, along with what their needs are, and how you can meet them?

GIVE VALUABLE ADVICE AND THE OPPORTUNITY TO GIVE A DONATION

As Covid-19 took hold, Asthma UK were stepping up the critical advice for asthma sufferers. They decided to go ahead with an idea they had been considering for some time but hadn't implemented until now.



Mark Hopkins

Head of Supporter Giving and Engagement,
Asthma UK and British Lung Foundation Partnership

The idea



Having seen a donation ask linked to content on both the Wikipedia and Guardian sites we thought as a team that this should be something we should now try. We knew from our insight on the website that the number one reason people visit is for health advice so it felt opportune to highlight that as a charity the only way we are able to supply information free of charge to so many people is from the kind donations we received.

Mobilising it

We decided the approach should be to insert the ask across the top 10 traffic pages on the website. Part of our insight also highlighted that our communications on the website do not always make it clear that we are in fact a charity – as a health charity some were seeing us as part of the NHS.





Therefore we also saw this approach as being an important way to impart our ‘three pillars’:

- 1 We provide free health advice.
- 2 We are a charity relying on donations.
- 3 Our purpose is to fund research to ensure future generations have improved lung care.

The initial ask focused on the huge impact Covid-19 was having on the charity in terms of increased phone calls to our nurses helpline and traffic to our website requesting asthma advice – highlighting the genuine need for donations to ensure we could cope with the ever increasing demands for our services.

Asking people to give, when they have also received valuable advice, has added to the positive experience they get, and of course it’s been good for us too.

Phenomenal results

The results were quite phenomenal. The fact that something so simple had such a major impact on digital fundraising was most unexpected. For the initial three-month period of testing on the Asthma UK site we found this Wikipedia-style ask became our fourth biggest income generator. We are now applying this approach elsewhere.

4TH

FOR THE INITIAL THREE-MONTH PERIOD OF TESTING, THE WIKIPEDIA-STYLE ASK BECAME THE FOURTH BIGGEST INCOME GENERATOR



Are you giving people the opportunity to donate as a result of the support and advice your organisation provides? Is there an idea that might be worth testing at this time?

PRINCIPLE 5: INVEST IN FUNDRAISERS

Fundraisers are the bridge between supporters and the difference your organisation makes.

An inspired and enthusiastic fundraiser is just what is needed right now. The better fundraisers are feeling, the better experience they will deliver for your supporters.

Of course, maybe you are the fundraisers, in which case replace 'fundraisers' with 'you'!

Actions



1

Be aware of the pressures that fundraisers are experiencing. Don't let fundraisers feel like they carry the weight of the organisation. Emphasise the shared challenge and ownership by the leadership team. Ensure your fundraisers feel supported and empowered to help lead the organisation through and beyond the crisis to achieve more impact than ever. Ask your fundraisers 'how are you?' each and every week and listen carefully to any change in their response.

2

Inspire and motivate your fundraisers. Do whatever it takes to help them to finish each working week feeling they are making a difference and are valued, especially if your fundraising capacity has been reduced. Log, share and celebrate your achievements, even the small ones such as feedback from a supporter or an unexpected donation. Ask your trustees and senior team to help with this – simply saying thank you goes a long way.

CRISIS FUNDRAISING

Everything you need to fundraise effectively - now

Fundraising in a time of crisis: SOFII's guide to navigating tough times



BY JOE BURNETT

In this series, we look at the lessons we can learn from the coronavirus crisis and how fundraisers can use it as an opportunity to change the world.

Charities... the new supermarkets?



BY RICHARD SPENCER

Can charities take on the role of supermarkets in the time of coronavirus? This is the question asked by our friends at About Loyalty.

The Good Suspended video series part two - three more fantastic little films



BY FRANCESCO AMBROGETTI

There is nothing ordinary about how these people are reaching out to help others. Innovation, kindness and generosity abound in these three videos celebrating the unsung heroes of the

YOUR USER GUIDE

Learn how to get started with SOFII



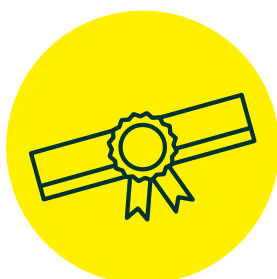
TRENDING NOW

What's hot on SOFII and in fundraising?

- **Movember: a professional fundraiser's story of raising money through personal sponsorship**
- **Refugees build bridges across society**
- **The Society for Effecting the Abolition of the Slave Trade: minute regarding the need for fundraising from 1788**

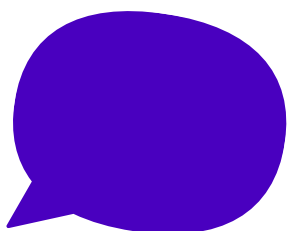
3

Support your fundraisers by ensuring that non-fundraising staff are clear about what they can do to help – from where to send an enquiry, to helping fundraisers understand the impact of the pandemic on your work, to providing emotive stories to share with supporters. The current crisis may even help speed up developing a culture to support fundraising across your organisation.



4

Encourage your fundraisers to seek out new learning to solve new problems and challenges to your fundraising and make quicker progress in adapting. As resources for training and development are likely to be limited or non-existent, use learning platforms, like SOFII⁴ as well as current blogs, podcasts and peer support networks.



5

Make informed decisions on fundraising quickly, **listening to diverse voices in your team**. The more diverse the opinions and voices, the more perspectives you will have to better inform your decisions and action.

6

Embed new working practices and promote wellbeing to maintain energy levels. Develop these collaboratively, not only to accommodate your team's specific needs and circumstances, but also to emphasise that you are in this together.

⁴ Showcase of Fundraising Innovation and Inspiration. Available at: <https://sofii.org/>

BUILD RESILIENCE

How do you build staff resilience with so many working remotely?
Here is how the Children's Society has approached the challenge.



Joe Jenkins

Director of Supporter Impact and Income,
The Children's Society



It's the role of the senior leadership to think about the whole staff team so the fundraisers don't feel on their own, or feel they are battling against the organisation as well as the challenges they face externally. There is an understanding that fundraising is a job for everyone – and we all have a role to play.

**The
Children's
Society**

We see this investment in people as mission critical and especially ensuring we follow through. We've introduced a number of initiatives since lockdown first started.

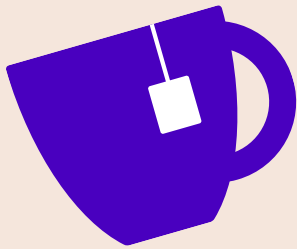
We introduced 'soundbite surveys'. These are every few weeks to check how people are currently feeling and what they are thinking about, and run for a week. We focus on a particular issue, such as personal wellbeing or equipment to work virtually from home.

We constantly encourage staff to try different ways working. If something is helping, we then scale it up – if it doesn't work, we seek to improve it. Since lockdown we've stepped up the use of everyone using Teams functionality. And we continue to experiment in how to use it.

We've conveyed the importance of time away from screen, that relationships matter, and to have breaks get some fresh air! Building their resilience is a key part of what we expect from everyone.

To help this we set up "In your neighbourhood," encouraging staff to connect with people who live locally, recognising we can't meet in our offices. I just did a walk on the South Downs with colleagues who also live on the South Coast.





“ We have found that our new way of working has become a great leveller and connects everyone on a more equal basis.

We set up a special interest noticeboard which includes everything from Netflix recommendations, books to read, as well as feedback and learning from conferences and events. We've made sure to give people permission to take time for learning as well as protecting the budgets to enable this.

When we hold an all-team meeting each month, we include breakout sessions across teams so people can connect with those they might not deal with, have conversations and share experiences.

Over the summer we introduced no meetings on Friday. And gave staff two 'switch off days' (effectively our own bank-holidays!), recognising the intensity of work.

We realised it's not enough to say stuff. You can say “we really value mental health” – but if staff don't see you do it yourself, or how they are given permission or resources to do themselves, it's just empty rhetoric.

Leading a team virtually is hard! However, we have found that our new way of working has become a great leveller and connects everyone on a more equal basis. And in some respects, has been even more engaging despite the challenges.

We remind ourselves it's a marathon not a sprint and we all need to pace ourselves.



What could you put in place to ensure your staff feel valued and can maintain their energy over the coming months?

PRINCIPLE 6: INVEST IN FUNDRAISING

In principle, and as far as you can, now is the time to increase investment in fundraising.

If you cut back, then the money won't come in.

Investing in fundraising isn't just about spending more, but sharply prioritising to invest smarter. Ask where and how you can do that, especially in the area of supporter experience.

Actions



1

Try not to succumb to cuts. We're often faced with across the board cuts but they don't make sense. Fundraising is a profit centre, not a cost centre that can help your organisation through and beyond the crisis. But if cuts are inescapable, prioritise ruthlessly to make your fundraising investment work harder.

2

Put together a compelling case for your senior team and trustees about why investment in fundraising now is best in the longer term for your cause. There are huge opportunities to be tapped into and your organisation should invest in those.

3

Engage with the people who are needed to back your investment in fundraising – your chief executive, the finance director and other members of your senior team. Spend quality time with each of them and help them understand how much you can do to help mitigate the current crisis by giving your supporters a great experience. Investing in fundraising now will pay huge dividends later.





- 4 Consider what every supporter on your database(s) can do now to support.** For example, can you send all intended participants in a cancelled event an emergency appeal, carefully crafted to give them a good experience? Make this the default position, unless there is a good reason not to.
- 5 Take great care before making fundraisers redundant.** Fundraisers are usually very adaptable, so if you can, shift them to areas where they can focus directly on supporters.
- 6 Work with your senior team to agree a whole-organisation approach to expenditure.** Now might be a very good time to recruit new supporters. People are feeling compassionate and generous and media costs are low. Where you have good reason to believe that such recruitment will break even within a year, it's clearly a good thing to do. On the other hand, investing in acquiring new donors usually takes years to generate a return. And the assumptions that underpin your past fundraising model can no longer be relied upon. Any trade-off between long term income and today's services must be made by the whole senior team, including you, but not by you alone. Of course, if you are devoting part of your fundraising investment to donor acquisition you must deliver an exceptional supporter experience to first time donors to cement their decision to support you.

ADAPT EXISTING IDEAS TO THE NEW NORMAL – AND GO!

Have you got a supporter event you've been planning for some time but have had to put it on hold? Could you adapt it? Prostate Cancer UK quickly rethought a cycling challenge they started planning well before lockdown.



Chloe Butler

Product Lead, Prostate Cancer UK



We started preparation for a new initiative – ‘Cycle the Month’ – in October 2019, known then as the ‘virtual cycling product’ internally. We wanted to add a product for intermediate cyclists to our own cycling programme, and aimed to build on our reputation within the charity cycling landscape. This initiative would not tie supporters down to a specific event date, time or place too, making it flexible and thus more accessible.



**PROSTATE
CANCER UK**

Covid-19 hit in March 2020 during the early planning stages for this virtual product, so everything was put on hold and ‘new’ products set aside to save money.

#CycleTheMonth

With a significant drop in income the team began to identify gaps and opportunities in the programme, it was here we noticed we still had supporters cycling for us, even though we weren't promoting any cycling. Alongside this, cycling was still allowed under the government guidelines with daily exercise and a focus on fitness and healthy living. From there it was all systems go.





Hit 100 miles and help us beat prostate cancer



Rob Craig

2 Sep · 🌐

Really enjoyed doing this challenge, it has been quite hard going but has been an absolute joy when family and friends have joined in. Looking forward to next year.



Tim Coffey

4 d · 🌐

Well over the moon managed to get to £300 on just giving + £70 on Facebook 🙌🙌🙌🙌. I have absolutely enjoyed the challenge and will continue to cycle. Looking forward to getting my PCUK cycling shirt I will wear it with pride 🙌

We had already conducted audience insight in 2019 for our 'virtual cycling product' but knew we had to respond to the upward trend of buying bikes in lockdown (cycling brands were reporting high sales of bikes). We hoped these new cyclists could use the challenge as a reason to get out on their new wheels, and so added an additional audience called the 'Lockdown Rookie'. As with all our products, we put the audience at the heart of the challenge and so adapted and crafted our creative approach and product messaging to suit their needs and goals.

25%

OF PARTICIPANTS CLASSED THEMSELVES AS 'BEGINNERS', REFLECTING THE UPWARD TREND OF PEOPLE BUYING BICYCLES IN LOCKDOWN

Initial results suggest our insight was right, with 25% of our participants 'beginners', and 70% considering themselves as intermediate. A total of 863 supporters took part, more than triple our target, raising a staggering £240,886. We have had some excellent feedback from those that took part, and look forward to running 'Cycle the Month' again in 2021.



Have you got an idea you have done the groundwork for that you could adapt and still press ahead with as part of your investment in fundraising?

INVESTING IN FUNDRAISING TO WEATHER THE STORM

2020 has been an extraordinary year for the Royal National Lifeboat Institution despite the added challenges of the coronavirus crisis. They had an ambitious fundraising plan lined up when Covid-19 came along. Investing in fundraising saw them through and enabled them to weather the coronavirus storm.



Jayne George

Director of Fundraising, Marketing and Media, RNLI



Back in 2019 we invested in training with our fundraising team, bringing outside expertise, as well as involving the rest of the organisation to help them understand what fundraising needed to perform at our best.



Lifeboats

What this investment helped changed was our attitude – and most importantly our attitude about our donors. It enabled our team to adapt communications – applying the principles of donor-centricity when Covid-19 hit. This means anchoring all of our communications in what our donors needed from us – not what we think our donors need to know.

As a result, when the crisis hit we adapted our spring appeal and supporter magazine with a key message: “You’re part of the crew and crew members look after each other.”

“I can’t tell you how much it meant to hear your words and feel your support.

— RNLI supporter

Supporters were so grateful for the message. “I can’t tell you how much it meant to hear your words and feel your support,” wrote one supporter. We continued to create ways to help people feel special and convey it’s their support that saves lives. Our spring appeal doubled its target.



“On behalf of the lifesavers, thank you so much for thinking of us in the past. Right now we’re thinking of you too.

— RNLI appeal video

Our summer appeal communicated supporters that our resources were stretched to the limit, yet calls for help were increasing. With income falling in some areas, as lifeboat stations were no longer open public, and our army of volunteers were unable to collect, their donation was crucial.

Feedback from donors gave us confidence to do a cold door drop in August. Our appeals in 2020 outperformed every target set, confirming our instincts were right – showing we are one with donors was the right thing to do.

Preparations for this year’s Christmas appeal have started with thinking about what are our donors needs are likely to be at this time, what they are feeling, and changing what we had planned as a result.

Great fundraising takes talent and focus. But it’s investment that translates talent and focus into a reality. When Covid-19 came along this investment really paid off.



Are you putting the case to invest in fundraising at this critical time?

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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