

Gifted Webinar 2 | Delivering a capital campaign Transcript

Amy: Thank you everyone for joining us. I'm Amy Stevens, I'm Chief Exec at Gifted and I'm here with Andrew my fellow Director and Chairman of our board. And today we're talking about delivering a Capital campaign during this crisis, this strange time that we're in and what you should be thinking about and how fundraising should happen at this time; thinking about the different stages of campaigns that people might be in so maybe you were at the very beginning of your campaign, about to launch it in fact, in the planning phases or maybe you're right at the end so we'll be looking at kind of the differences there. Throughout the session please do submit questions to the Q&A. Please try and do the Q&A and not the chat because we missed a couple of questions last time because they came in through chat. If we do miss anything, we'll drop you an email later and try and answer them directly. When you do submit your question, it would be really helpful if – as well as obviously letting us know your name – if you give us your organisation as well. Because we have a range of different organisations today; we've got theatres, schools, hospices, museums, churches, cathedrals – the whole range. So, it would be really helpful to know what organisation you're from so we can try and pitch our answer and give you a really specific answer to that. We'll try and stick to our hour. Hopefully we won't be more than that – we may be quicker than that; we'll see how many questions you have but we certainly won't go over that hour mark and keep everything on schedule because everyone is spending a lot of time on zooms at the moment. So, Andrew do you want to say hello to a few people while I load our webinar?

Andrew: Well hello everybody I'm sorry I can't see you it, it was great to see so many familiar names on the list of attendees today and thank you all you've made me spruce up my office. I've got my tie on – that has not been worn for a couple of months, so yes, it's just good to be getting on with it. I'm pleased to see such a diverse group of organisations joining us today. One thing I think you'll discover through this in fact I'm sure you will is that as much as I think things have changed there is an awful lot that has stayed the same and there is plenty for us to be getting on with at the moment and lots of fundraising opportunities for us to progress. But we've got to think afresh about some of the fundamental principles we've always worked with in running our capital campaigns so anyway I look forward to catching you in a few more slides time.

Amy: Excellent, thank you. So, to start with let's just think about some of the challenges and concerns that are occurring during fundraising through COVID-19. Those of you who were on the webinar last week you will have picked up on this slide then, but we wanted to reiterate because obviously the situation remains the same. So, what are the challenges we're facing in fundraising? Well, obviously we don't have that face-to-face contact, we can't sit in rooms with people and have face-to-face discussions. Yes, we can do it electronically, but you know, it's not quite the same. It does have a different vibe when you're not actually in the room with people. There that obvious financial uncertainty and that's faced by both organisations, charities themselves, but also by the donors themselves. We don't know how our donors are either struggling or perhaps not struggling at all at this time which is something to remember as well. But there is that real financial uncertainty both for individuals for the economy as a whole. That is global at the moment. Another challenge: we don't know when it will be over. Hopefully it will be soon, but I think everyone is accepting there's this new normal that everyone's talking about. And we can't put time

scales on things at the moment which meant that we constantly need to reassess where we are, what we're doing as fundraisers and how we should adapt as the situation changes. Lots of people are concerned about: is it the right time to be talking about money? A real challenge that people are facing: worried about connecting with their supporters and their donors in case they cause any offence. I know a really big question that charities need to pose to themselves is will this damage our project more or our fundraising more to sit back and wait and hunker down or to continue with it? And actually, that risk of waiting can cause loss of momentum in your campaign it could cause uncertainty amongst your supporters, so they're wondering what you're doing: you were going full speed previously and now everything's gone quiet. And these will be some of the things we will talk about as we go through this webinar.

So, what can we be doing at this time? Well first of all it is important to say: now is absolutely categorically not the time to do nothing. And this is now actually the perfect time to look at strategy. And that can be whether you need to do a feasibility study, so you haven't yet started your major program. It can be that you are part way through your campaign, and you need to look at your strategy and where you are. It can be that you're starting to think about other fundraising programs, legacy campaigns, corporate programs, individual giving and how that all fits together. So really our key advice would be really using this time to look at your strategy. We saw this in 2008 and I mentioned this on the last webinar as well that during the financial crisis those charities that went to ground and did nothing really struggled coming out the other side compared to those who used their time wisely who looked at their strategies who took the time to do all those jobs that you never normally get time to do: research etc because we're so busy and really importantly those who continued to communicate with their supporters and continued to build their relationships. So, strategy now is the perfect time. It's a step that should not be missed: really really important. Andrew is there anything that you want to add before we move onto the four key steps we're going to talk through?

Andrew: I think we need to just remind ourselves Amy that capital fundraising is an intensely personal type of fundraising. We're actually asking our prospects to give in some cases the largest gifts they have ever given in their life so we just it's not a reflex type of giving as you would get in public appeals and so on so in that sense we've got to remember that we're first talking about engaging our prospects from the heart and then from the head. And there's enormous opportunities at the moment as my view and I think in many other places as we've seen in many other places with some of these major fundraising drafts for the NHS people are more in tuned about the values and the things that they hold close to their heart now than they may have been in the past. So, we have opportunity there and we'll explain a little later about how you can use that in your current capital fundraising. The second thing is that there is a perception that suddenly the world is a more complex place out there. The world has always been a complex place. There was always another big change, another budget, another financial cycle around the corner so there isn't really anything terribly new about this, it's just that we haven't actually come across a pandemic before. So, change is part and parcel of capital campaigning and we should therefore approach this change using those same tools very much and again we'll look at that in a moment. So just a couple of thoughts as we go into these next slides Amy.

Amy: So, what we want to talk through are four key steps that we think every organisation, whatever stage of capital program you're in should think about at this time. Step one is looking at the finances. So, sounds very obvious but reviewing your income and expenditure. Looking at what your projections were and what they are now given the situation we're in. And that can be very different for different organisations so it may be that you're losing visitor income, or it may be that you, the majority of your funding comes from community events sponsored runs etc a lot of the hospices are feeling the events. So, you'll not be able to conduct those kinds of events. So, review your income and expenditure and think about not just for your project but also against your general operational cost because that will help you balance whether you need to pull back on certain elements or indeed proceed with certain elements. And from that you can assess whether your remaining targets are achievable. And juggle timelines etc and strategy accordingly as we'll come to. Really critical" meet with your major funders: national lottery heritage fund, arts council: all these funders and the private trusts and foundations the Garfield Weston's etc. And they're all being incredibly helpful, having zoom calls with grant recipients I know a lot of the big funders are pulling forward grants so you can draw down your money sooner to help with your cash flow. So, take the time to meet with them. They're not going to pull your project because you're honest about your financial situations. They understand the situation that charities are finding themselves in. So really do have an open conversation with them because that as well will be able to help you to plan your finances and how that works. Now I'm actually going to try and battle with technology and bring in Kate who is a director of operations at Newcastle Cathedral hopefully Kate... we should now be able to hear her. She's going to tell us just a little bit about Newcastle and their approach to finances at this time. Kate can you hear us?

Kate: Yeah yeah yeah, I can hear you can you hear me too?

Amy: Excellent we can hear you yes. Wow well that went better than I thought it might.

Kate: Fabulous I'm so glad I haven't got a picture I didn't brush my hair this morning. Anyway, its fabulous to be in here. I've got lots of colleagues from my cathedral and other cathedrals here too so big hello to them as well as everybody else. Just to give you a bit of background with where we are and what's been happening with Newcastle, so we were awarded over £4m from the national lottery heritage fund in May 2019 to deliver our common ground and the sacred space project. That project had been 10 years in the making and we had some knockbacks along way, so we were well ready to start this. And start we did. So essentially that project is to deliver a program of activities, learning activities as well as huge capital works programs that will remodel the interior of the cathedral, the exterior to really kind of make our spaces come alive and saying that appeal to a broad range of people and essentially to really improve our engagement with all sorts of stakeholders and to bring in a lot more money. So, we have a business plan, we've still got the business plan – we had a fabulous 10-year business plan that showed that we were going to be sustainable within 10 years. Like lots of cathedrals we run at an annual loss and we limp along with some reserves and some income but realistically we needed this project to really help us along with sustainability. Significant fundraising has been carried out by the cathedral trust. Well over £1m from match funding project. The cathedral trust separate charity that fundraised for the cathedral has been working exceptionally hard targeting high net worth

individuals, trusts and foundations, holding fundraising dinners, looking at VAT relief all those kinds of schemes and really working hard to see us down that road. However still a long way to go. Aiming to achieve all our financial targets with our project as well as trying to make us sustainable year-on-year. We did have some money through the church commissioners to appoint a three-year fundraiser really significant for us and we were just about to embark on that when the lockdown happened. So Like lots of people come 17th march we closed the cathedral probably the first time in 6,7,800 years. So unthinkable but it happened. We furloughed most of our staff – over half of them – our income dropped rapidly but what we did do – we started really looking at our emergency financial planning straight away. So, we reforecast all our accounts for 2020 we looked at different scenarios at income and expenditure. That was a huge task

Andrew: Reimagining how the cathedral can work in a completely different set of circumstances and as challenging as that is, I guess it has been kind of exciting too at times has it?

Kate: It has actually! I would be lying to say that it wasn't really exciting just to think the unthinkable and have those questions, have the conversations with the dean, with colleagues, with the cathedral trust that we've never had before and put things on the table that may have been considered really out there 6 months ago so yeah I think we will survive by being creative and we have an absolutely fabulous team working really hard on this.

Andrew: There you go that's good teamwork really counts. So, thanks for sharing that Kate. What we'd like to do is try and draw from what you shared there as we go on now and look through the next sections of this webinar and Amy's back: we lost you there for a minute.

Amy: I have the screen back! Sorry – you crashed out there.

Andrew: That's it I thought I was driving the motorcycle from the sidecar. Okay.

Amy: You can all see the presentation hopefully.

Andrew: I believe so. Its looking as it was. So, we're onto step 2 which is dealing really with the engine room of a good capital campaign: your prospects. Now to start you really need to refresh in these times. It was interesting to hear what was already happening at Newcastle: you need to redo your prospect evaluation. Now, we all know don't we because there you go you've read the book prospect evaluation rating – I won't give you the page number but – those four indices you need to go back and examine particularly as we know in capital campaigns those top 10 to 20 gifts are going to be where you will find up to 80% of your target. So, refresh your prospect evaluation. Go through and re-rate each one of those prospects. Those 4 criteria if you remember is the first one is your access how close are you to them? Are you able to speak personally to them? And if not, how do you get to that place? The next one is their capacity to give: that is bound to have changed. Let's bear in mind to a number of prospects: business are, some of them are doing far better now than they were previously, others have lost a fortune and are really struggling with their business model or in personal circumstances individuals likewise that are no longer having to

commute or pay childcare are suddenly feeling a lot better off than they were whereas others who are running their own small businesses will be feeling much more financially vulnerable. So, that's the second area is their capacity to give. The third one of course is their propensity: are they givers or not? This is great time to get on with the research and keep your eyes and ears open for those public appeals and those organisations that are putting teams of their own staff out volunteering and getting active in the community. That shows a high propensity to give. The old, remember the analogy the sheep and the goats well there are people who are givers and there are people who aren't. So, you need to make score and understand on your prospect list that you won't only want to be focusing on those who are the givers. And then the final piece is there interest in your specific project? Not just your organisation but the actual thing that you're raising money for in your capital campaign. And that has changed fundamentally because the world is now being viewed through the other end of the prism so again an important rescoring on that criteria. Remember those four – they're all in the book with better explanation than I've probably given you now and of course if you want a free copy of the book let us know and we'll send some to you. So that's the first piece the next bit is revisiting your closest supporters and Amy referred to this before. Go have chat with your godparents – your institutional godparents. Share with them the challenges that you're facing. You're not alone it's not because it's your fault that we've got this economic crisis. So, sit down and talk it through with them and soak up the wisdom you may be surprised where support and great ideas come from. The world is shifting and there are fresh opportunities as a result. The third one is that case for support the very reason that you're running a capital campaign. It's important to go back to that look again is that now really relevant now. Some of the cathedral fundraising about expanding visitor facilities and so on may be less attractive when you've got social distancing or the prospect of it for some time. But equally other elements about doing virtual tours and getting people around the world to visit your cathedral or your school or wherever is another option where which might be much more attractive in your case. And the final piece on this slide is really taking a positive and open approach to when you've got donor that are giving by direct debit or they've made pledges to make payments over a period of time if you're part way through your capital campaign. Don't wait for them to come to you and say "I've got financial problems" or to miss a pledge payment date. Be proactive: go out, talk to them, talk and give them a payment holiday if necessary but keep that pledge alive because what you'll find very often is that they don't have a problem so they may suddenly say "you know what you can have all my gift now instead of over the next four years because actually I've got the cash and you clearly need it to keep this project going" or they may be so grateful to you for giving them an extra year to make their pledge payments that you find they keep going after the 4, 5 year pledge term that you've worked out for your campaign. So, step 2 then is really thinking about your projects doing that evaluation, going having a chat to your institutional godparents, retuning and refocusing your case for support and being proactive in discussing, rescheduling pledge payments and having candid and open conversations about money which is what we're all about.

So, it feels really weird just doing this and not having anyone disagreeing with me, so I'll press on. The third step is time scales. Again, the phasing of your campaign is really important just now. There is a lot of uncertainty out there. This is a good time for cultivation, building relationships, doing your research and strengthening that case as we explained. It may be much tougher though obviously to be running information events and

public gatherings. So, look at the phasing of your campaign. Be creative about this. Obviously I think we're all fed up with Zoom drinks parties and all that. But there are moments and ways that people are connecting online. And what I've been amazed at is how much more available people are right now for a conversation over something like zoom or facetime or something so it's you can get to more people you can still speak to them face to face – you're just not in the same room. Those sorts of thoughts about the execution the phase stage, phasing of your campaign you need to revisit that just now and as far as when the right time for the public appeals is this is using technologies. I think when lockdown is eased and we do hopefully get a vaccine and we're able to all gather again it will feel very different nonetheless and I do think there will still be a reluctance and a fearfulness particularly amongst older people in coming to those sorts of public gatherings so we need to redesign our public appeals. They are, in any event, in a capital campaign the icing on the cake: they're the thing you do at the end to maximise the amount of money that you're going to raise before you close your campaign. They're not the basis on which you know you'll make multimillion-pound targets. So, we all know that. Possibly in rephrasing think again about when you do your public appeals right at the end of your capital campaign as part of the celebration if you like of achieving your target. And the third piece here in your timescales is to focus down on that critical path. What really matters right now are those key relationships with your top 10-20 donors and the people on your campaign board. The technologies available such as we're experiencing today to get really quite personal 1-1 with people so don't let the fact you can't have the big dinner party, jamboree galas and all the rest of it, hold you back in the delivery of your campaign. But do reschedule and rethink your critical path measuring different things now about the types of engagement such as this one that you'll need to do to get to the ultimate goal.

Onto step four, if we could, Amy, and you can jump in.

Amy: I'll just add something on public appeals Andrew. As well with the public appeals, think about the kind of organisation that you are. So obviously health organisations at the moment are doing incredibly well for putting something more public out there at the moment. For others it might be the time as much as you think we want to jump on this band wagon – everyone's running crisis appeals etc – it might be the time to think actually this will be far more successful for us when lockdown is eased and for example people want to go back to the theatre or the visitor attraction etc. So just think about your time there in line with the kind of organisation you are as well and when its likely to have the greatest impact for you.

Andrew: That's a good point. Very good point.

Amy: Andrew, step 4, action.

Andrew: The fundamentals in capital fundraising haven't changed probably forever but certainly for decades in my experience. It's still important to lead by example. It's still important for your leadership group within your organisation to be public in their leadership for the campaign to give and to be seen to be giving collectively and to therefore to ask others to join them rather than sitting from within the bunker suggesting everyone else go over the top to get to the targets to. Those fundamentals have been tried and tested through multiple recessions and if you haven't, I would encourage you to revisit them,

they're again in the book. Just do a bit of an audit on your current campaign: where you're at against those fundamentals. You may be surprised how helpful that is. In communicating with your supporters, stick again to the fundamental principle that people respond on a peer to peer basis when you're talking about money. They don't respond well to broad and blanket appeals. And certainly, the levels we need to get the targets we're after. Funnily enough what I'm finding working really really well are hand written notes. Letters to 10-20 people you can get two or three done a day 10-20 in a week and out to thank them for their support. So everyone that's paying their direct debit gifts to you at the moment look at that list and write to them and thank them for what they're doing now: how important that is symbolically to you, what confidence it gives to you, how valued their ongoing support is. So that personal handwritten note is going to be much much more impactful and genuinely received than sending them all sorts of invitations to events and gala activities. So, lots of communications but really concentrate on the personal ways you can do that. And that proactive approach of thanking in fact it's the best way of asking is to thank people. You'd be surprised how often when you go out of your way to thank somebody that they turn around and give you another gift. So, I'd encourage you to be creative about this but be positive. On the top of your to do list as a professional fundraiser every day should be "who can I thank today?" and "how can I do that as personally as possible" and the next point about honesty and integrity goes back to those fundamentals as I'm sure Amy will also remind us. But if you are facing financial challenges or even that you're unclear where things are going, start that conversation now. Be honest with your supporters, have them join you if you like on that journey as you have to make adjustments and have to come to terms with that but also acknowledge the opportunities that are there. It's not all doom and gloom but it does require I think a fresh set of eyes and new thinking in your communications so you need to be more proactive sometimes in that approach rather than sitting back and following your 3 yearly newsletter cycle and... do you see what I mean? A bit more guerrilla like if you like. But lay it out, people are expecting and appreciating that straight-up sort of candid talk at the moment. I've talked previously about the leadership endorsement and then again you can also reflect that as I was saying around these thank you notes you can have "thank yous" coming from all over the organisation. Not just across, maybe your governors if you're a school it could be writing few of those personal notes with some help of course from the development team because you do need to know who has been written to. But also, you can find in a school context senior members of staff, you know house masters and house mistresses and others they be given some cards and asked to just thank those returning to school whose parents may be worried about them you know coming to boarding houses and things like that in these uncertain times. They seem like common courtesies it's very easy to overlook them however. And that simple leadership endorsement at every level in your organisation collectively can be really really powerful. It sends a strong positive message to your supporters. The last one on this slide is around volunteer training. This I know just looking at things and I think we've had a question If I may earlier from James on this matter. Am I right Amy? Have I got the right question?

Amy: No different question.

Andrew: Different question. I beg your pardon. The volunteer training in a cathedral context can be you can over make things more complicated than it needs to be. What we're facing at the moment is that people – when we do bring, enable some sort of socially spaced

worshipping cathedrals or large public spaces, the concerns in volunteers greeting will need to be about managing that situation. But there is also an opportunity to train the volunteers on how to direct those people who want to support you. And it needs to be really simply. So that they can, for example, do they have a set of your business cards at the reception? So that when someone comes along and says “how can I support the cathedral – let’s say – at this time of emergency and what you’re doing” they can be easily provided. And simple training too for volunteers so that they understand the key words around gift aid, you know, that it will put 25% more value on that gift and just very very key simple key messages is the crux of good training. If it becomes more complicated or if you’re even suggesting those volunteers become askers you’re going to head into deep water and it will get very difficult to manage. Do you want to come in there Amy?

Amy: yeah just to add something on the thanking which I think is a really key point here. Bit of a real time example so an organisation I’m a trustee of, we recently received a gift from a lady towards one of the projects and the chairman of trustees wrote immediately on email in this case but immediately obviously thanking on behalf of all the trustees and also sharing the impact that that gift will have and where that will then allow us to do. And she immediately wrote back and the first thing she said was “thank you so much for coming back to me so quickly, that’s brilliant” and then she said “what else do you need money for?” so we told her and she made another gift of the same amount and that was purely because the chairman stepped up and thanked her immediately and very personally for her gift so. Not something that should be overlooked at all but sadly sometimes can be.

Andrew: It’s a classic example where givers give again: it doesn’t seem right; you would think if someone’s given you shouldn’t possibly ask them to support you again but it’s just not the way it works. People who have already demonstrated a commitment to your organisation are the most likely ones to give to you again now. You just need to make sure that the case is up to date. That you can express right now why their gift is important and what an additional gift would do.

Amy: Absolutely. So, looking at engaging prospects. Obviously, this is something that’s causing concern for a lot of charities at the moment. Particularly with regard to major gifts. How do you keep that engagement level going when you can’t go and meet for coffee, dinner, drinks have events etc? As we’ve spoken about, obviously prospects should be approached with sensitivity at the moment. We don’t know what people’s situations are. But there is lots of different ways that we can recreate that personal approach. First example here: live Q&A with seeded senior leadership or specialists. So, I was speaking to a former client recently hospital client who were concerned about engaging their biggest donors at this time. And we actually arranged a live Q&A with one of the senior clinicians’ specialist in the area that these organisations have given to. And it was suggested to be around 5 to 10 people invited for online live Q&A so that they could actually have their questions answered by the people in the know. As those fundraisers who were working in a medical environment know you pick up a certain level of knowledge, but we are by no means ICU consultants or what have you so. To enable the donors to engage one on one with the clinicians specific to that area that they’ve given to is a really good way of keeping them engaged, seeing the difference their gift is making from people on the ground basically. We can of course do one to one video meetings. Virtual tours of new facilities. Or

indeed do a group facility so Andrew and I were speaking with a cathedral client recently and saying how strange almost and how lovely it is to see the inside of the building on a virtual tour and it makes you realise how much you miss being there. So, they can be really impactful at the minute, I think. Video updates on email not simply text as we're probably all feeling: there's so much email and online material at the moment that people are really relishing getting that face to face contact. And a good example of this is at a conference last year I learned from another organisation which was the nature organisation and they found that their individual giving regular, monthly, direct debits have two key drop off points so they were losing donors at 6 months and losing them again at 18 months. Wasn't sure why was. But they're trying to tackle it so, they actually got their rangers to film little selfie videos on their site to say "hi, we're in derby at pond A this what your gifts have helped to achieve this year blah blah blah" and that was then sent to people within that area at that six-month drop off as a thank you and an update and it was that really personal approach. And they actually saw a change in the drop offs of their direct debits. Just through having that more personal approach and I think that's even more important today when we're not having that personal interaction that you think about kind of different ways of doing things. Interactive hard copy post: there are some weird and wonderful ways you can send information in the post nowadays. A former school client of mine I know was looking at something that folded in the post in a different way just to make things more interesting for people to open. And of course, we can plan for those future face-to-face events. We hope they will be back soon. And we need to plan for the future as well. Andrew, I think you're going to talk to through some of the benefits of continuing fundraising at this time.

Andrew: Yeah, I can't remember who said it but "never miss the opportunities that a good crisis presents". This is the change to actually change some the things you really couldn't change before but you wanted to. We have one client at the moment who has never been able to raise money at event dinners. It was never appropriate for them to do that. Long history: couldn't be done. Everyone was going to die who tried that on. Guess what? They're having a zoom fundraising dinner because they're cooking it in their own homes, they're donating what they otherwise would have otherwise done and they've found a charity to support that's very topical and relevant at this time in their area and they're hoping that this will now set a new trend for future fundraising dinners so: Hooray! A breakthrough. Let's see if that happens. But you've got a real chance here to capture some benefits. Principally by really working hard on your communications you have an opportunity to grow and build the trust of your supporters. And no matter what the challenges may have been in the past, this is a defining moment for many people where we're being asked to reflect on what really is important to us and in our lives whether its family of course and friends and absence is making that feel all the more difficult. Or whether it's a visit to our cathedral church or school our community organisation. This is a moment to double up your efforts there and you can, and will I believe benefit from a much stronger relationship a much more trusting relationship if you do that. So, the other piece is really around your resilience. If you can imagine yourself on the other side of this crisis, how much stronger will you be as an organisation as a result? Okay your balance sheet might have taken a hit, you might be doing different things with your business model, but as an organisation if you can survive this you can survive most things. And that's going to give a lot of confidence to your supporters as well that you can ultimately get to your plan even if it is a little later or in a slightly different format: its travelling that ground with you that will help them strengthen

that relationship with your organisation. And build that reputation for being able to deliver. Funnily enough, and no surprise for some who know me, I like parties to celebrate moments along the way on a journey, not just when you get to the end. I'm a firm believer in a capital campaign plan that one of the first things you need to put in it is the date on which you're going to celebrate achieving the target. And make sure you plan a good party for that moment even if it is a somewhat virtual one at the moment. And then there are other key moments and celebrations along the way. Yes, they will parallel if it's a building project moment in the building program but they're also celebratory moments when you can pass certain financial milestones when you have established or created your leadership board. When you're unveiling or announcing press releases, your new promotional material, a virtual reality example of what you're doing: you know you can imagine, you can think through these ideas. But you need to think ahead for those moments and in the old days we used to do things called "campaign launches" they were a big celebratory moment where everyone would come together and they would be an announcement about a campaign beginning what the objectives were and most of the fundraising, a lot of it that's been done before hand: the key thing that people didn't know until that launch celebration was how much had been raised up to that moment. Success brings success is the old adage and there is a genuine moment in capital fundraising and by planning those key moments of celebration whether a traditional campaign launch or a victory party at the other end or key moments along the way, you actually build momentum into your program. People are then confident you're going to get to target. They want to get involved. And you can also see the day when your life will get back to if what new normal might be whatever that is. So, this whole process does offer opportunities to make a positive statement for the future. And it can build and strengthen relationships for you if you're prepared to go back to those fundamentals and work terribly hard on the communications. Amy.

Amy: Excellent. So, moving on to a few case studies now. So, first two are towards the end of the campaign and second two right at the very beginning so we'll give you those different viewpoints. For Newcastle obviously, we heard from Kate earlier approaching the end of a major campaign and looking towards the future. The key advice here I think from me would be to look at the strategy for the future. Obviously, you need to maximise all the good will you have gained through your campaign which has been incredibly successful and make sure that dovetails into your future strategy and you make the most of it. So you're able to bring along those donors that currently perhaps have given solely to a capital project and you want to create programs and bring them into your organisation to continue to build those relationships with them and hopefully have them as a longer term donor for the organisation that will ultimately make you more successful in the future. So that would be my key advice there. North Yorkshire Moors Railway is another client of ours which I spoke about also at the last webinar but it's also relevant here so. They're at the end of a 10m pound campaign and we were appointed to look at their future strategy so they've always been very successful with the statutory funders like Newcastle big lottery grants but never really had any concrete strategy for other forms of fundraising so that was what we were appointed to look at. Obviously then the COVID-19 crisis hit. They have huge deficits with visitor numbers stopped for the time being. So they're looking, they've launched a crisis appeal and we've actually changed what we're looking at now so we're still planning their future strategy but critically making sure that they're making sure that their crisis appeal dovetails with that and doesn't contradict it in anyway or doesn't hinder future fundraising

in any way. So that's really important to think of for those of you who might be going into launching new fundraising programs or launching a capital program and you're currently in crisis appeal, emergency appeal mode. Think about your strategy and make sure that those two do work together. And that you don't plunder opportunities for the future by kind of snatching at the pound now in the wrong way so that's where we're at with the railway. And then Andrew I think you're going to talk about St James and St Mary Redcliffe.

Andrew: Yes, I might need some help with St Mary Redcliffe Amy but Malvern St James. I'm just delighted to have Olivera, Fiona and Camilla here today from Malvern St James School. Very beautiful school and a very beautiful place and I bet it looks gorgeous today but you started your feasibility study before this crisis hit and we were in process of preparing a study report which was probably one of the most challenging professional pieces of work I've had to do in the sense that the whole set of criteria for how you assess performance in a capital campaign shifted. You know, people's capacity to give, propensity for the project etc: the one really big thing here for Malvern is that your campaign was absolutely bang on for today. It's about smart classrooms, it's about delivering education in a digital format on site and away from site. And it resonates as much now if not more frankly than it did pre-crisis. But the other piece was working with you on retiming the campaign, allowing a more extensive planning phase to enable the school and the school's leadership to engage with those key prospects and settle things down because of course schools have their own drum beat as we all know with returning for terms but even more so in Malvern's case I believe as a girl's boarding school with girls travelling from maybe or maybe not from Hong Kong and elsewhere around the world so there's a lot of uncertainty in that element. So, it was really those two pieces it was making sure the case was relevant today as it was yesterday and revisiting those timescales and giving yourself more space if you like to work on those communications. And then St Mary's Radcliffe it's a large 10-20-million-pound capital project but it is crucial that the project is being rescope as I understand it Amy and its being reset in this new context.

Amy: Yeah so, the team got in touch this week and welcome I know you're online Rees and colleagues. So, they're currently at the stage where working with the architects to develop their plans and they're now at that stage where they think wow do, we need to actually rescope our project again? Because will our 10-12million now be feasible in the current situation? And what I'd recommend there is that you do the fundraising feasibility before you start fundraising and actually probably before you rescope the project. Obviously have your architectural team etc start thinking about how it could look but as we always say when looking at feasibility study, let's think about your dream. What's the best-case scenario? Because it could be possible, and you don't want to scale back that project to perhaps half the size and then realise wow actually we could've done it. And it's a lot harder to go again and either run a second campaign or to change a campaign part way through so I would certainly say yes absolutely start thinking about the different forms the project could take. Whether it could be phased to help you deliver that in smaller chunks but to do some feasibility work first to see where that money might come from and if people support the vision. Any other comments Andrew on the case studies before we move onto the questions?

Andrew: No, thanks Amy. Questions will help us there.

Amy: So questions, I did say on the last webinar that I would unmute people when we did their question but there's so many people it would be really challenging for me to do that so we will answer the questions as best we can and obviously we can follow up with people afterwards if they've got further questions. So, Andrew I think you're going to take us through a couple of them.

Andrew: Yeah let's do that. First thing: if we miss you or if you have questions afterwards don't hesitate to email and we'll have some details up in a moment for you to do that. And likewise, as I said earlier if you'd like a copy of the book or another copy of the book again, email and we'll happily send a free copy to you wherever you might be in the UK. Now, Rachel I think from St Marylebone Parish in London says that we're keen to start exploring the potential for corporate support. With many businesses not being fully operational what can we still offer to them that is relevant in return for them financially supporting us? Good one.

Amy: Yeah.

Andrew: What do you think?

Amy: I'd reach out. Reach out now to some of those who have supported you in the past. And I know Rachel you've got a few key businesses locally that have stepped up to the mark in the past and seek their advice. This is the perfect time to do that. One thing we do quite often with clients when we're looking at strategy and what have you is run surveys. And it's always really surprising that quite often when it comes to recognition what people say is they simply want a thank you letter or they want a phone call from the leadership etc now corporates I understand want a bit more of in terms of the marketing collateral but let's not overthink it before you've tested it because there's no point trying to create some new weird and wonderful corporate program that you think is going to appeal to them and actually they don't want that much in return they want simply X and Y and you've put together a whole alphabet of options for them. So, reach out to your corporate friends and seek their advice and see what they would expect at this time.

Andrew: And let's always remember Rachel that churches like St Marylebone sit as cathedrals do at a crossroads within their own community and this has really been a challenging time for many not just businesses but personal losses and I think churches and cathedrals particularly become place of reflection and remembrance as they always are but at this time I think businesses will relate more strongly to that than they may have done in the past. So what ways can that be recognised? I mean Amy did a piece working at St Albans abbey some years ago, I'm wishing to aid you Amy but you did the Aim Calls for a corporate program there it was about when could people could affectively buy an angel that was hung up in the nave it was actually really quite a pretty and thought provoking display but it showed both community and connectedness it enabled focus for giving but it was offering a presence in the nave of the abbey and I just think there may be elements around that form of recognition that will resonate with businesses given where you are in London as well Rachel so be creative. But you need to give businesses very tangible, they need a focus, they

need to know what it's going to cost its slightly different sort of dialogue than you get with an individual giver I always think. Amy I'm sorry I dropped you in it there.

Amy: No absolutely I agree. Yeah, yeah yeah.

Andrew: I'd go that way and the surveys are a good one. The other piece is just lift the phone people are much more accessible to these zoom meetings and other things frankly I think I'm too available sometimes I can never get off them but my point there is you can probably sound out half a dozen or a dozen local businesses you might even be able to almost cold call some that you weren't able to reach before. It's not that far to Christmas, I hate to say this, and obviously you know businesses will be thinking through the next 3-6 month cycle and how can they be evident and be seen to be active in the community and churches are a very clear place for that to happen. Yeah.

Amy: Indeed. I think, did we have a question come in in advance, Andrew, from James? About the trusts?

Andrew: Yes!

Amy: I think James was asking about whether grant makers were grant makers were only giving currently to emergency appeals?

Andrew: That's right. James Emerson got in touch, sent us an email through saying "what assurances have you been given by funders that organisations whose finances have been seriously damaged by the current crisis – maybe to the point of their ongoing existence being threatened – will not inevitably be priority in the allocation of the available funds?" So, what assurances have we been given by the funders... that there will be some priority there for available funds? I think that's a tough one I think there is no one size fits all by any stretch as far as the grant funders are concerned. There probably lies the answer to your question James. It's really important now to spend some time reconnecting and getting back to those grant funders. Talking with their administrators, clerks if you like or if you've got a trustee link even better to find out where their priorities are now because in many cases they're shifting in, as Amy said earlier sometimes they're paying up more quickly, maybe they've varied their current funding schemes. But in many other cases it's business as usual they're just cracking on basically, so not everything has in fact changed. SO probably in short, the answer is double up on you communications James, get yourself on the phone and start talking directly to those correspondents and keep those applications moving. I think in many of the bigger funders cases their websites are very good as well, they've been keeping them well up to date haven't they Amy.

Amy: Indeed, they have yeah yeah. I think we're at five to three so shall we try and answer any more questions?

Andrew: Yeah well there's one more here from Carol Ward. Thank you, Carol who asked us, 'carrying out a community audit' – ah been a while- 'has always been an integral part of planning for a capital campaign, what advice can you give about carrying out a community audit during lockdown and with social distancing?' Here to stay for the foreseeable future.

Well I think we've talked about the use of technology and the degree of accessibility and so using opportunities like this you can also actually encourage people to come in to these meetings. The webinar approach that we're using today could be really helpful and the other piece is the around the surveys and survey instruments. The challenge I always find that when there are people who are just off the grid technologically and it's not an age profile thing it's just some are not interested and never have been in the internet and you still need to reach them so one of the things we've been doing is having someone – I know it sounds laborious – responding to people phoning on a dedicated phone number and getting their answers to questions that you're putting out there for your audit. Sorry Amy, please jump in, what's your thoughts there?

Amy: No, I agree with the online surveys etc. Slightly more challenging now but what I'm doing with a Church client up in Cumbria, they actually went out and hand delivered surveys to every household in their parish they were able to be collected at the local store, dropped in at the local store to ensure that everybody had the opportunity to give their input. And actually, the way the community rallied round their project has been incredible and I think it is in part because they really did genuinely seek advice to make sure that everyone could give their input.

Andrew: very true, right, time for one quick last one.

Amy: One more, we'll pick up the other questions offline.

Andrew: Ok, mark green, 'are awards for all responded to our initial grant application with a blanket no grants over next 6 months until coronavirus is urgent. Apply fresh in 6 months' time! Just in case you didn't know it' Yes thank you very much Mark we are aware the lottery is always and always has been a lottery and it is a moving target. Just when you think you got it right, they change the rules anyway. Thank you for airing that.

Amy: We've been updated recently, so I had a client in a very similar position mark who were about to go for a decision at panel and their application got pulled and we've been told they... new updated system back to what it used to be, so non-emergency system, probably won't be in place until the end of this year and that they would definitely expect to see applications then looking at the changed world of how they will then deliver their project given restriction that will still be in place so something to think about as well if you are going to resubmit.

Andrew: We've got a client at the moment who's in the final stretch with a lottery grant just completing their community fundraising and there's a lot of uncertainty there and so just communicating back and forward its been about removing that uncertainty for their incoming donors to know that the lottery grants are not going to slip away. Another one earlier in the process has been told obviously the heritage lottery are not going to confirm in the next 6 months a bit like what you're talking about but they've gone back and negotiated with them and said "right well we want to get underway raising the match funding that we were ultimately going to do anyway" and they've kept the heritage lottery up to date on that and been supported in it and it will therefore strengthen the final decision if they've got their match funding in place and it's a really strong message to donors as well.

Amy: Absolutely absolutely.

Andrew: All about communications, that's the key.

Amy: Excellent, so what we'll do is we'll pick up the remaining questions offline because it's 3 o'clock now we don't want to keep you on longer than that hour. What we would say is obviously do give us feedback we're all learning in this situation if you think there's things we should have covered, and we didn't please let us know we can learn for future webinars. As Andrew said if you would like a copy of the book please do email Julie her details are on the screen there and she'll pop one out to you. And then... ooh... I'm trying to start a poll. I'm just launching a little poll now. Would be really grateful if you could all complete that. There are just 3 questions on there and that will just help us learn for the future and see if there's other webinars people might be interested in. As we've said if you want a one-on-one chat let us know and we'll do that. We can arrange that offline. And we have hopefully – we will see- recorded the webinars and the first webinar on our website already and hopefully we'll get this one sorted and uploaded within the next few days. But thank you ever so much for joining us. Andrew, any closing remarks?

Andrew: No, just Thank you! I'm delighted to see – or not see as the case might be – but so many names, familiar names and faces and friends. Thanks for coming, I hope it's helpful. Keep the faith! Do not give up! This is a fantastic opportunity for capital fundraising and the more work you put in now the bigger the rewards will be so stick with it. You'll get there.

Amy: Absolutely. Thank you everyone. Stay well and hopefully we'll see you soon.

Andrew: Bye Bye.