

# Winter Webinar One | Recovery and Resilience

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**Hosts: Amy Stevens, Andrew Day**

## SUMMARY KEYWORDS

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00:00

**Amy** : Welcome everybody and thank you for joining us, I'm Amy Stephens Chief Executive and I'm here with Andrew Day, who's a director and our chairman, here today to talk about recovering resilience in these most challenging of times. So, thinking about, you know, how can we have successful fundraising during this time and keep our fundraising on track and keep hitting targets. We're recording the webinar, and you can listen to it online or on our resources page on the website in a couple of days. So any colleagues want to catch it again, just direct them there or anyone who's missing it today.

00:34

We've got a variety of organisations online with us today, a whole range, from churches and cathedrals to hospitals, hospices heritage venues, youth organisations, etc. So hopefully we'll kind of try and cover everything, something for all of you. If you do have any questions, if you pop them in the q&a, we'll address them all at the end of the webinar, and we'll go from there. So, we'll get started. And before we

actually talk about how to recover, and be resilient, we're going to look at where are we now. So, recently we put out a survey online.

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And thanks to all of those of you who did respond to that, to really look at the third sector, where are charities sitting at the moment what challenges you've been facing. So, we can try and offer the best guidance for the way forward and we closed that last week, So, we're going to look at some of the headline results of it initially to think where are we now, but that full report will be available to you.

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through our website, but if you'd like that, emailed to you, please just pop Julie, our colleague a line at the end of this presentation, and she'll send that to you as soon as it's ready. And what we did in that survey as well, was actually break that down sector specific, so we'll be able to see what different sectors have faced different challenges, and I'm sure you all will have so, you know, a church for example, may have faced completely different challenges to an NHS charity during the pandemic. So we'll look at the overall results now. The report will drill down into some of those finer detail points.

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So first of all, which of the following statements best describes how your charity has been affected since March. Really interesting, so around 60% of respondents actually said either fundraising has been more successful, or you've been able to maintain particularly with help from those special COVID-19 funds that have been launched and or the grantmakers who you know stopped to their general grant making focused on COVID only. So, I'm actually quite encouraging to see that 60% have had either a positive or or maintained their activity and income, but there is of course that large amount of 38% there in the red have seen a significant decrease. And that's just a small number saying we don't know if our charity will survive the next year so obviously something we need to look at to offer guidance on their income streams is the next one so which income streams declined the most since March 2020 some

interesting results here some very predictable, such as the income generation so charity shops those organisations that have lots of charity shops really felt that hit when they all closed. Corporate giving, obviously we all know, declined, and community giving you know we weren't able to hold those big events to sponsor walks and runs etc.

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Interesting that regular giving is so high there, and I suspect that may be because we did have a significant number of respondents from churches and cathedrals, which obviously rely on that plate giving weekly. Many are set up to have that online regular giving capacity. But when we break down the data and look at those sector-specific areas we'll be able to give a bit more guidance on why that figure is where it is, but other than that, no real surprises on the income streams that have declined.

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But then looking at which income streams have increased since March of, some people none of those increased, but for all those online, obviously is the really obvious one. You know people really geared up, I think if you have a company selling online services at the minute you've done incredibly well over the last few months, activating people online.

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Interestingly as well the major giving there.

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It's been interesting for us as we've continued to work over the spring, summer and into the autumn, speaking to people like wealth managers, for example, who, you know, have been saying, actually, the wealthy are still giving.

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They're still giving but they're being more particular about their gifts so whereas somebody might have spread their annual gift allocation, they're now giving all of that to the charity they care most about, which I think it's really interesting so it's pleasing to see actually that people are seeing that increase in major giving and I think if you have seen that, it reflects obviously perhaps the targeted message you're putting out at that time but also that you have really strong relationships with your major givers, because if you've continued that dialogue, you know, this was the time when you needed them to step up to the mark so it looks like they have done that, which is interesting.

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Prediction for the fundraising targets this financial year so over 35% believe they'll be on budget, which is great to say, and a few even exceeding budget, which would be fantastic.

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The remainder, almost 60% will be below budget 20% of which more than 50% below. So we need to think about how we address that, how do we come out of that and move forwards.

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And then finally, how has the pandemic affected your overall fundraising strategy? Really interesting so only 14% felt that their strategy held and well, and are confident in its future.

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So that's the column on the far right-hand side there. All the others are needing attention. So for many, it made us realise we relied too heavily on some income streams, I think a lot of charities have realised that during the pandemic, so making tweaks so making a complete overhaul and others thinking actually turns out we never really had a defined strategy and we really should think about that.

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Whilst, you know, it's been an incredibly challenging time, I think if we can look at any positives to have come out of the a pandemic, one of those is that charities will probably be more resilient going forward, because the pandemic and all the pressures it's put on us is forcing us as fundraising professionals to really think about strategy more carefully, and have a more robust strategy and I think long term, the third sector will actually benefit from that.

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So there's some stats for now, as I've said, the report will have much more for you but that kind of outlines for us where we are at the moment. And I'm going to pass to Andrew now to talk about some of the ways we can address strategy, and think about how we proceed forward through the next the next year or so.

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**Andrew:** So, I mean, all of these are tools, if you like, in our in our toolbox to help us deal with that big question about where do we go to next. I think the whole world could probably use a recovery audit just now but, but these tools, we're going to run through the details now, hopefully so you firstly understand the difference between a Recovery Audit and doing a Fundraising strategy Review, and also the key elements of each of those, those particular tools so that you can see the benefits. The recovery audit is really very immediate. you know, it's what's been the struggle? Looking back at the stats that Amy's just shared with us, if you reflect on your own organisation, where's been the weak point for you and where are you falling behind, but also focusing out on where are the big wins? What was fascinating for me at least reviewing those stats because I love major gifts work, as you know I'm probably the world's laziest fundraiser, I like to get a few rather large gifts and move on.

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But it's interesting to see that major gifts have actually stepped up, and I think it really underscores those organisations that are staying close if you like to their institutional godparents, saying thank you

sharing the story, keeping them up to date with the challenges that are there, but also the opportunities, and they're in, you know, is getting more big, major gifts so where are the big wins for you is really understanding what are the opportunities this crisis pandemic has brought forward but also coming out of it. Remember, we will come out of this, what's and we need to think about what the terrain is going to look like, where are the opportunities for your organisation then, and then really, what are your next steps? it's an immediate, keenly focused process a Recovery Audit, to get the pulse back to build out your budget for the immediate period.

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If we look at the next slide, Amy, thank you.

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Right, arguably for the recovery audit is for

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those not only who've done well during COVID-19 But obviously, those who have struggled. You need to consider both your fundraising objectives but also some of your operations and they do crossover. We've seen that obviously with things like charity shops and how they've functioned, but the capacity to move some of that online, it's a benefit that you could carry on beyond the lockdown. And we're seeing this too with churches and cathedrals moving to service delivery, ministry, music online, and the fact that it's broadening the reach, the congregation is not so geographically confined anymore. And people are dialling in for the, you know, the evensong services, whether they're in New York or Sydney. So, you know that there are real opportunities there as well. And it's a chance to just step back, use, use this period and your recovery audit to look at your broader five-year strategy. I find it tough to build a strategy out beyond that. And a recovery audit is just a chance to refresh what you've got in place, tune it up and make sure it's ready for the next period, and particularly for that next year and this is where a more detailed action plan is important. And it's done very quickly, a recovery audit is a crisp, snappy

process, You've got a plan in front of you and your trustees for delivery within the month. So, it's a quick fix, an objective view, and it gives you a sure path or sure set of footsteps to take on that path to recovery.

**Amy:** Yeah, and I think that point about the five year strategy is really important Andrew that, you know, we've seen throughout this process charities who've really really struggled, and those who've done really, really well. and said, 'but we're only a year into our five year strategy so we don't need to look at anything.' And actually, for most organisations your strategy has now completely changed because of the pandemic and the changed landscape so whether you've had a great year or a bad year, it's always a good time to look and reflect and see if that strategy is now right for you going forward.

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**Andrew:** So, you can see there in the in the fundraising strategy review, it's a more, If you like broad and more encompassing process, taking a close look at your overall fundraising Case for Support, that's your ambitions, your long term goals and your short term goals. And looking carefully, defining your fundraising methodologies and they're into the sorts of resources you've got to invest in those particular fundraising methods, and that you need to secure in order to build out your new approaches there. it has to be a timetable and defined budgets, and it's a timetable as well that isn't just about. If you like goal setting from a financial perspective, but it can also be about building out the various projects and programmes, so that those cases are properly formed and ready to take out for fundraising purposes. And then, too, you need in any good strategy and strategy review, a clear set of way-markers so that you can do your evaluation and review process. And, it's a healthy moment to look at your governance, you know, things such as your gift policy, has it been refreshed? The dreaded GDPR policies, etc. And, more particularly as well when your accounts, you know, restricted funds as opposed to designated funds, all those sorts of important constraints are dealt with, as part of your fundraising strategy review.

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So it comprises six pieces here as you can see, the first one is really framed around particular questions. The first one is position audit. So where are you now, and we all you know you might think you know where you are but you when, by the way, when you've been through a position or that you've often surprised yourself as to the places you're in that you may not be aware of. And then really round, what are the key learnings and researching what others are doing, trying to look there for some suitable benchmarks. It can often be outside sector so it's not just one school looking at another school, depending on the type of fundraising, your geography, also your ambitions, you might want a different set of benchmarks, so that key learning research is helpful for scoping where you're going to from here. And the stakeholder researcher is more inward looking, it's talking with your stakeholders, your beneficiaries, members of staff, other funders, partners in some of your service delivery for example, so that you've got a really clear fix on a shared view about where you want to be. The fourth one, there, is the resources review. Where is the money for where you want to get to? And, as I said before, it may be amongst your existing donor base, but it may require you also to reach out and start engaging different stakeholder groups and different sources of funds, and which is important. And then the options appraisal. Where are you going? So, this is about setting out where, quite often, it's the choices around speed to be honest with you, how quickly do you want to get there that impacts on your overall resource expenditure as well. If you've got urgent and compelling needs, one of your options is going to require quite a significant input of investment to get off the ground. That's one option. If you take the long view to build up an endowment, that's another option. Maybe they're overlapping or interconnected. So, this appraisal is a really important piece to forming your final strategy they're at point six. And this is so we all understand how these elements lock in together, right back to the governing body and the trustees understanding where fundraising sits and the delivery of their vision through to your stakeholders and other partners and the roles that they will be asked to play to help achieve it. And most importantly, I think with a fundraising strategy you need to have a clear idea about what it is, what does this place look like when you get there, partly so you can plan the party and



celebrate that moment because it is a, is a major achievement, I think, when you've gone through the building of a strong fundraising strategy and ultimately, you're delivering it. And it's important to celebrate that and recognise that as across your whole organisation, because it's a big big moment.

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So we have three forms of fundraising just to remind you and they do lock in together, but so we're taking you through a little, layer one is your annual fundraising, This is the pink bubbles on the left, and you've got various tools, which you're all very familiar with, whether it's direct response or direct mail type fundraising tools, events income generation, all those sorts of steps, the middle one there is your capital fundraising, this is where you're looking to raise a large sum in a relatively short space of time, usually for a specific project or programme, and there are opportunities here to dedicate or designate particular gifts. It's much more directed through peer to peer, face to face asking. It's often described as pledged giving, possibly over a period, and talking about tax benefits as well. And then the third is around endowment funding. This is usually legacies or bequests, Will making programmes and their recognition clubs and other tools in that pool. The three work together because someone who may join you giving a regular direct debit gift of, you know 20 pounds a month five pounds a month 100 pounds a month, whatever, could be asked for a special reason to make a pledge gift for a capital campaign, and may in turn also be somebody that is prepared to leave your legacy or bequest. So the three worked very closely together, but the tools are distinctly different. And they need to be used discreetly so there is a knitted together programme that you build out when you created your fundraising strategy.

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**Amy :** Okay. So, meeting 2021 head on.

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Literally. Yeah, I suspect we will have another challenging year ahead of us, but there are, you know, lots of opportunities for us to move forward and help resilient charities.

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So, as we've said it's the perfect time to review your strategy going forwards. Think about where you want to be, are you there, reflect on how the year has been, and as I said previously, think about, you know, does that five-year strategy actually really work for you anymore, or do you need to rejig and re address perhaps some of the projects that are in there even. Thinking about going digital, more and more organisations have adopted online giving programmes. Now obviously that will never replace something like major gifts asking, it never will. But it does make easier, make it easier for people to give to you, and it's something you know that we should all be considering I think in this time Who'd have thought we would have spent our entire lives on Zoom and Teams and, various other meetings and we've managed to do it so going digital, and webinars even, going digital hasn't been too bad.

19:07

Although I do miss face to face, I don't know about you Andrew, but I really miss going out meeting clients, you know, making plans together on the table but hopefully we'll be back there soon next year. Communications, more important now than ever before, we've said this throughout the year, keep communicating with your supporters, and ultimately, keep building those relationships. We've heard really nice stories of, as we saw, major gifts people stepping up and making major gifts, and it's because relationships have continued to be built. And, you know, charities have reported back with impact statements about what work has been delivered and that encourages more support.

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Be flexible and adaptable. We're going to talk about few scenarios in a moment from our client portfolio where, you know, they've particularly, been flexible and adaptable in the current climate and taken advantage of opportunities for raising partnership opportunities.

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And that's really important, I think, as things continually change. And finally share experiences. It's been really nice to see a lot of it on LinkedIn, you know, charities, helping each other and saying, This is what we're doing, this has worked really well for us and not thinking I'm gonna tell them my secrets because you know this is a good thing for us. Actually, charities have been really happy working together, I think. And it's important, when times are hard, as well, that we do have other colleagues who understand the fundraising world, that we can pick up the phone and ask for advice and share opinions and experiences with them.

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So, first example for us is Peterborough Cathedral.

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So, we started working with the Cathedral back in April, to look at some strategic planning, so a full fundraising strategy review for them, there. They had a lot of new team in place, so it was important to kind of set that from the start and then let them run with the programme. Interestingly, their focus has been largely on income generating sustainability projects. And I think particularly at this time, that's been really appealing to supporters, because, yes, everybody needs money at this time, every charity is need of money, but actually this is about longer-term sustainability so that revenue generating projects that an investor, a donor can say 'okay, I give X amount, and it will enable the cathedral to raise x amount per year. And that's been really popular.

21:46

They're installing new unrestricted giving programmes. We all like unrestricted gifts. We'd have all gifts unrestricted if we could. The image there is the Christmas keys campaign, which they've just launched, which will be rolled out into a Cathedral keys programme, next year, which is their kind of recognition vehicle for the Cathedral.

22:09

They've been very reactive to fundraising opportunities, the director of fundraising at the Cathedral has been fantastic. Every time a potential funding opportunity has come up, whether it be the National Lottery Heritage Fund, or other funders providing resilience and recovery funding, she's been on that. She's been applying and she's done incredibly well from it. So, being able to be reactive and act at that moment has been really important. And again, adapting to a digital world.

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It's not always the easiest for churches and cathedrals to get online and get their teams online, whether that be for meetings, Broadcasting Services, or online giving, etc, but they've done that and they've really benefited from staying very engaged with their community through providing those online services.

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It's been amazing Amy, just with Peterborough, because you and I've had a long-standing relationship with Peterborough going back decades actually, just how the regular supporters have come forward again. All those efforts to stay in touch, the newsletters, etc, has meant really when the tough moments came, they've been able to go back to that well of support. And there's been a huge amount of goodwill, and a desire to keep the cathedral functioning and there for the community. So I've seen something similar, I might add down at Gloucester cathedral as well, where some staggering major gifts came through from long term committed families and supporters in both cases, recognising the importance of these places for community sanity really, as well as ministry. So, yeah, it's a pleasing example but it does really show the importance of long term sustained cultivation and support programmes, you know that this doesn't happen overnight, does it?

Amy: No, not at all. Next one, completely wacky and totally different. This is the Noah's Ark Foundation based in South Africa, which has seen the world's biggest conservation project underway.

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And, you know, it's a 5 billion-pound project with 3.5 billion looking at philanthropic resources, which you may think that this time, I mean, insane. Why, why are you embarking on this, but you know the team invested in the strategic planning. We spent the entire summer looking at the strategy for a global campaign. And actually, this project is needed now and we've done our work we know what our strategy is, we know how we're going to attack it. So yes, we could wait for 18 months until hopefully the pandemic's passed but that's 18 months too late, you know, we have a plan. Let's execute the plan and they're going for it with a 3.5 billion pounds global campaign.

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There's also a TV series in production, so they're ploughing on with that as well, courting their major gift prospects, obviously, looking at some very high-end gifts. It takes a lot of time and effort. And that's been supported by a global PR programme, which broke across the world at the weekend and I've seen some of it in the national media here and overseas as well. But this is a completely different example of an organisation who is, you know, not letting the pandemic affect their plans but has also done it in a way, by not just ploughing on blindly, but investing in that strategic planning first.

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**Andrew:** This one here is one of mine, it's close to home at Kenilworth. Interesting this is a state school multi-academy trust that's in the process of moving from two sites to one. It's a major build, it's a secondary school, so it's a 50 million pound or thereabouts new school building project. And, we'd done the feasibility study we'd got everything lined up, the major gift prospects had been well cultivated. Things were moving along quite nicely for our 1.5 million pound capital campaign, and boom, we hit COVID, everything stopped. What do we do? And whilst we've got underway with the planning phase what we've really been doing over these six, seven months is actually extending that planning phase, we went through the process of enormous amounts of communication with the prospects. We've been fine tuning the project and particularly the elements for fundraising purposes. And we're reconfiguring

the team now to better reflect those changed opportunities. Some businesses that we had been cultivating faced very tough times, others have done incredibly well. And the great thing for Kenilworth school is that it is 'Kenilworth's School'. That town in Warwickshire's main and only secondary school, so if you're from or in Kenilworth, this is going to be exciting news, as this project starts out this coming spring. So, with the reboot, we've been refining and enhancing making more personal, if you like, the fundraising case. They're talking possibly less about buildings and more about the young people. This school is going to shape the future generations that will benefit from this. We've been working hard with our prospects. In many cases, engaging, and informing them and if you're aware of those, the whole programme of Prospect evaluation and rating, that's been helpful to us in getting a clearer fix about who to ask for how much and when, and we've been getting a sharper focus on the elements of the project that we want to raise philanthropic support for so that, again, that just strengthens out the case and then makes it more compelling. So it hasn't been wasted time. The judgement now is around when do we restart, if you like, more public facing sides of this. It was good to have schools return and I think that was an element of normality for us, that we all benefited from, but it's not yet really been possible to engage the wider school community, so hopefully early next year that will feel very different for us.

28:38

**Amy:** So, we're going to move on to some questions. Andrew, can I ask you to look at the q&a section online because I have control of the mouse controlling and I'll drive everyone insane with going like this across the screen if I do it. So, hopefully we've had a few questions come in?

**Andrew:** Well, I mean, to be honest I've not yet seen any so please do put your questions into the q&a section of this webinar, and I've got an open line here. I've had though, Liz Hancock from Mary Evans Hospice in Nuneaton get in touch, prior to the webinar, Amy, and she was asking us how to keep asking for support, without triggering donor fatigue or appearing to have a poor business model. For example, your fundraising because you're failing...

**Amy:** yeah. I mean, from my perspective, I'd say demonstrate that impact, as we mentioned earlier. So when you know your supporters, you may have made an ask at the start of the pandemic, show what you've done with that, show the impact that that had on your patients and the families in your care, and that will inspire your donors to support you further. You know donors always want to see that their money's been well spent, don't they? That would be the main thing for me it will be demonstrate impact.

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**Andrew:** And the interesting thing about is about choosing your moments for asking, and this is a particularly good time of year. I mean there are many people. Presently, who are actually feeling a lot better off than they have done. They didn't spend money on summer holidays and they certainly aren't paying for those long commutes, you know, but they're still working incredibly hard and appreciating things in their community, like their hospices Liz. And the care that you've given them, your staff have given throughout this pandemic which must have been incredibly tough. So I think you've got a reasonable moment to ask people, to pause and reflect this Christmas, to maybe share a little cheer with those who are continuing to do what you and your team are doing at Mary Anne Evans hospice, and also I think if the ask, in this case is more as given, it's delivered as personally as possible, rather than just blanket asking as you know because we talked about it, Liz. You as, Chief Executive possibly need to have a direct chat with some of your major donor prospects in the past and give them an update on how the year's gone, and the sorts of challenges you've got, you know, coming up in the year ahead. So maybe that's a good way to frame your ask. And the final part of your question, which I think is actually a really, really good one, is that fundraising in my view, is not example that your business model is failing. Quite the opposite. It's very often around the opportunity that you can't know deliver because you can only go so far on the business model you've got. So, in that sense, I'd turn it around, Liz, and present it as positive that you need some new investment to do new things.

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Amy we've had a couple of other questions, but I hope that answers your question Liz, but please give me a bell anyway if you want to talk it through further.

31:59

We've had a couple more come in, one from Mark Davey, who asks, how can we forecast fundraising income in 2021 With so much uncertainty at the moment, Amy?

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**Amy:** Indeed, how can we, it is a big challenge, and I know a lot of organisations are thinking, you know, how do we set budgets? But again, that's why reviewing your strategy is actually the perfect time. So, as Andrew touched upon, just before, with the last question, that Liz's question, now's the time to engage your supporter base and say,, 'this is what we want to do for the next year', trying to engage levels of support, particularly with your major donors, having conversations with them now, about your plans and testing that proposition with them, will help you to gauge the levels of support that might be there from different elements. We never know with corporates, for example, whether, that corporate who gives you a regular monthly gift will be able to continue doing that, we can't predict that. But by communicating with the donors as much as possible. It does help us to gauge where money may come from.

**Andrew:** I think, Mark, if you're doing a recovery audit, you will set targets with a tolerance. You know you'll do a sensitivity testing, if you like, going into the year against the different income streams and some are probably responding, even in COVID fairly well and others are responding very poorly we saw that actually the survey didn't we? So, you could model your income, against a range, and then try and tighten it as best you can, by examining some of those risks but I think to try and, you know, as we've done in the past, take last year's performance and add 5% to get this year's budget isn't going to work. It's going to have to be a lot more sophisticated. The short answer, sorry long-winded answer for you but hope that's helpful.



**Amy:** Yeah. Interestingly as well the data that's coming back from some of the legacy providers, so legacy foresight, for those of you who follow them, are saying that whilst this year we might see a slight dip in legacies that come to fruition, because house prices dropping etc, the value of a legacy gift might be slightly lower this year, They're actually predicting now, whereas initially they thought the yikes, this might have a real impact on legacy giving, they're actually predicting now to have minimal or little effect and actually more people left bequests in their wills during the pandemic than they did beforehand. So, you know, it's a very difficult time to project our income but some statistics are supporting that at least some income streams may not suffer too much.

34:56

**Andrew:** Here we have Charley Meehan who's an expert corporate fundraiser. Welcome Charley, good to have you with us. Charley's asking us, how do other charities, here, deal with the challenge of high demand for corporate volunteering and limited or no realistic opportunities to offer. So there's lots, wanting to do corporate volunteering. But how can they do it, given the COVID situation. Do you have any thoughts on that, Amy?

**Amy:** You know what, I haven't had any experience of that over the pandemic, I guess that's a question more for the charities that are on line with us to see how they've been dealing with it. I mean, it's not the usual, 'Can you come in and paint the walls?' because that's not allowed at the moment, but perhaps think about organising online events and fundraising events and and doing it that way, perhaps, or offering online guidance for people depending on if it's professional services they can they do and do it that way.

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**Andrew:** And thinking digitally. It's interesting how some of the corporate volunteering can be focused particularly in the education sector about online tutoring and support. And that's not just a student.

Sometimes it can be, you know, to teachers and academics who might need help, if you like, in an online world, with some of their presentation skills or their networking or research projects. I think in the broader national charity context Charley, which I know is more your scene, it is about remembering that corporate volunteering is all about involvement. And I take your point at how you actually express that in that lots of corporate express that by doing lots of things for team building purposes. How that can be expressed in a digital context is much more challenging. And, look, if we can share some best examples, we'll do that Charlie and likewise if you could with us, we'd be really grateful. It's a good question though.

36:59

We have two questions from an anonymous attendee, I always like those. So if I may with the first, Amy, 'what do you do when your fundraising campaign board seems to be demoralised, as some trustees are not really onside?' Wow that's actually, that doesn't just rely on COVID That can happen at any time.

37:21

**Amy:** I was just going to say, Yeah, but that is not a COVID situation I think we have all experienced that at one time or another, haven't we? I guess there's different ways to look at it Is that it's demoralised because the fundraising challenges is so great at the moment and you're struggling to raise funds? In which case, get them involved in looking at the strategy and planning a new way forward. Or is it because so much pressure has been put on them, because you've been so busy, and how to address that? Think about it. Remember as part of looking at your strategy, what you can also do is consider your skills audit of trustees and volunteer boards as well. You know, you may have people who are thinking, this is the right time for me to step back, actually. And it's an opportunity for you to refresh your board, or it's a good opportunity to have a really honest and frank conversation with them and find out what's troubling them, how to support them going forward. You know, is it that your

trustees ultimately need additional training on online sessions or face to face asking, etc. Yeah, what would you add Andrew?

**Andrew:** It's interesting though, I actually think one of the toughest things to do in working with volunteers in fundraising is to actually fire the ones that aren't working. How do you do that in a way that doesn't cause all sorts of problems? It's really difficult, and in some respects, allowing people to retire with good grace, you know, making them if you like vice presidents of the campaign or giving them some time, but enables us to step back without feeling as embarrassed about it. This could be an opportunity for you, anonymous attendee, to refresh that board. And the other part too. And I've seen this actually just recently, is getting this 'done' with iPads in this case, getting the board, close to the beneficiaries, taking the dreaded iPad to the scene if you like or the reason why you're fundraising and showing them, why, where, and how this money is going to be giving them that live update, And then getting to comment and ask questions. The trouble with the world that we're in at the moment is I think people have become very removed, and in some cases, quite desensitised and to enliven them again. You've really got to work doubly hard to bring the case to life, and express it to them in a meaningful way that really calls on them to do something in the short term, rather than just sort of sit around a board meeting table, because that's the way fundraising boards used to work. You just attended, you dealt with the papers and you didn't do very much quite often between board meetings. So maybe there's a chance here only for us to reset the way that your fundraising board operates by, you know, helping those who aren't functioning to finish and leave with good grace, get them closer to the case and bring the case more alive and to get them to do more work between board meetings, so they've got something to brag about maybe when they come together, could be interesting.

**Amy:** I think that point about getting them close to it. You just reminded me that in the summer, if you remember when we were on the call with Peterborough and we were watching the fly through of being inside the cathedral, we're were all like, 'we're in the cathedral' and because we hadn't experienced it

for so long, for very different reasons, but actually seeing it and feeling like I was there, it kind of gives you that energy doesn't it?

**Andrew:** It does, it's really, really very moving. It's funny, anyway iPads are amazing things that, you know, even your phone, it's amazing how close you can get to things. Anyway, our anonymous attendee follows on with the further question, to say 'any thoughts on the best approach for legacy campaigns in the current environment?' Amy?

41:30

**Amy:** As you know legacy campaigns are my favourite thing. And interestingly, the data coming back from the survey was pretty much 50\50 split on that. Some people thought, absolutely, legacies are now more important than than ever and others thoughts, now is not the time to launch a legacy campaign. However, in my opinion it's probably the perfect time to launch a legacy campaign, not only because people are questioning their mortality, and thinking about things like, will-making and legacies. And it's not a sense of taking advantage of that. Because a legacy campaign can be launched at any time if your communications are sensitive. The main advice I will say to you is, do not just suddenly blanket mail all your supporters with a new legacy programme, because then it will look like you're kind of perhaps being a bit insensitive. Good legacy campaigns, are run as major gifts programmes. It's about personal approaches, which can still be done online. At the moment, having conversations with your donors, perhaps running a survey to think about what do people want in a legacy programme, you know, are they wanting recognition, etc, one of our earlier webinars we did on legacy programmes and we touched on this, well we discussed in full, but we touched on what you would need in your in your content for that. So, feel free to go back and check that one out, but I would say you know there's never a wrong time to launch a legacy programme, People will die. month on month year on year regardless - and if you do it in the right way and you are sensitive to your donors, and you run it like a major gifts programme, you shouldn't have any negative impact at all on the perception of the organisation. And, actually remember that one of the main motivators for leaving a legacy is the desire

that we all have for a degree of immortality. Not for us personally, but for the things that we cherish, our values, the institutions that have been a major part of our lives, and we want to see prosper in the future. This is actually quite a good time to have that conversation. I think there are people that are reflecting, as you say, I mean, probably reexamining their own plans for wills and other things. So, it is a time where people are asking questions about what's really important to them.

44:10

**Andrew:** So, I think, I think that's a that's a good question, anonymous attendee Thank you very much, hope that's been helpful? It's interesting also one of the chats that come in Jan in Hyde, that's around the profile of volunteers and how that's changed, I don't know if you've seen it, but indicating that Janet's saying that fewer older people are actually volunteering because of a fearfulness around COVID, understandably, but others have stepped up, and, and that's what's going on up in Rochdale with their emergency hubs up there. So, there's also a chance actually to bring on some of our younger volunteers and leadership, possibly in our organisation.

44:49

So, I know Jan, you were responding to an earlier question, but I just thought that was a helpful reflection. Also, when we looked at legacies, thank you for that. I've got now Andy Castle asking us a question, Amy. He's asking with all the additional emergency COVID funding that's been made available this year. Is it likely that grant funding is going to be more restricted, reduced going forward as a result? What's your thoughts on that?

**Amy:** Interesting one and again quite difficult to predict. You know, a lot of the forecasts are saying that grant funders will see their income levels dip because of investments. However, some have invested very well, and have seen increases in their portfolio, so it's very hard to judge who will and who will not have money to distribute. And we've already seen funders like the National Lottery Heritage Fund opening their doors again, Their programmes open again on the 25th earlier than expected they

originally said 2021 earliest and they've realised now that actually, you know, there are lots of projects out there including smaller projects that couldn't apply for the COVID funding that need their help, and they're opening their doors again. So again, opening up. And again, we're running a webinar on this, in January, I believe it is, which we've publicised but if you need any details. I believe it's on the website but if not get in touch with us, and we'll be doing a review of the grant making scene and looking at the state of play, how the land lies from both those kinds of national funders, but also the private grant making trusts and foundations as well.

**Andrew:** Andy, the big driver here is watching the stock market, and more broadly the economic output if we come out of COVID and we see a big step up in economic growth and a step back up in the performance of the stock market, then there will be funds available in these major trusts and foundations for distribution and, as ever, they'll focus and be looking for biggest impact. So, it's down to us as professional fundraisers to bring forward proposals that tick those boxes but have really sort of urgent compelling cases show the needs that we're going to have coming out of COVID, I wouldn't be anticipating, unless there's a flatline economic performance, that the grant funders are gonna start stepping back from it.

**Amy:** We've seen many six figure gifts haven't we during the last eight, nine months for non-COVID projects so an often very unrestricted giving now we're getting out of ground from the squares before it was all you had to get to this amount before you got that amount, you had to jump through that hoop and do the cartwheel and then stand up and sing, hey presto, and then you got your money, but now they're just going, here, you're good at the money - which is refreshing. But, yeah, okay. Thanks, Andy. That's a good one. More to come on that note, encourage you to come along to that webinar in January if you're up for it. Mark Davey asks a question; with the additional pressure put on fundraising teams this year, and potentially next year. What advice could you give regarding supporting them, and ensuring their general well-being?

48:09

**Amy:** This is fundraising teams did you say as in the Fundraising Professionals.

**Andrew:** Yeah, yeah. Yes.

48:17

Amy: Yeah, I think you're absolutely right, Mark I think fundraisers have been under exceptional pressure this year. Whether that's launching and running a hugely successful crisis appeal or battling for every penny to keep that charity afloat, I think you're absolutely right. And, really important for me in these kinds of difficult times has been actually making that effort -and we all get fed up of zoom calls and what have you, but actually making the effort to connect with people, and check in with people and see how they're doing and as I said in one of the earliest slides, share experiences. So, within a sector, and I know particularly NHS charities are particularly good at helping each other, you know, a lot of the larger charities will give advice to the smaller ones on programmes they've rolled out, etc. It's helping each other out sharing experiences. And keeping in touch with people, really.

49:14

Andrew: It's funny because it's always trying to find a way to keep that conversation that used to be done, you know when you're in making coffee together or going out getting some lunch or something and how do you do all that when you're working so separately. So, it's partly having a willingness to share funny pictures, and celebrate those moments when you can, you know, there's been a success or a milestone has been achieved or something that we know is meaningful, that's a bit novel, has happened. So, I think it's, as a manager, investing the time to, if you like, focus on and research those things and share them in sensitive ways and encourage others to do that. Equally, it's about checking when people start. I don't know, getting a bit dark or you're generally in that negative spiral that can

happen. So, it's being brave enough to check that and say come on, timeout. You know, that's, not going to help us here. I think it's being prepared for that and knowing how to deal with it.

50:21

So, as managers I think it's going to take a lot more work Mark, the short answer, this is where you earn your pay in managing your fundraising team, but if you can do it, we're seeing some outstanding performance from those teams that are jelled and have risen to this challenge.

**Amy:** Absolutely, and I think, I think people have been working particularly hard and not, only in a fundraising scenario, but a friend of mine said her workplace which is the commercial workplace have actually now installed an enforced dinner hour between 12 and one, no meetings, to stop people working through the dinner hour, or lunch hour, I'm Northern, apologies. Working through the lunch hour and, you know, eating five minutes at your desk which isn't healthy for anybody. So, things like that can help.

For me the other day, I received a card in the post from a friend. A funny card with a little note in, or something that has happened. And actually, because everything's online, receiving that in the post was really nice so it really, really made me smile. So just think about different ways we can connect.

**Andrew:** You know that is very powerful.

51:34

**Andrew:** Snail mail is so unusual. It's not rubbish. It has much more impact than it used to do that's a really good suggestion. I mean we should remember that even with our donors, you know, writing a little note saying today, this happened thanks to your support or I thought of you when this happened or, you know, it was a year ago you joined our board and what a year it's been and thanks for all you've given us. Maybe once at the beginning of a day while you're having a coffee guys, write five notes,



handwritten notes and post them out to the people that have been important to you. This year, and particularly coming up to Christmas you shouldn't just have to wait to do Christmas cards to do that, I guess, but I liked it I mean we'd have bought, we still carry on with the bad habits we used to have when we weren't in this lockdown situation like eating over your computer while you're trying to get your emails done. But that hasn't helped us. That's a really good thought I mean, enforced breaks, I'm going to remind you of that. Next time, we've got Simon Crookall, who's asked us the question, 'any good ideas for cultivating new prospects when we can't have events?'

**Amy:** Yeah it's really challenging, isn't it? People are getting very creative with this, and it's all about creating something special I guess, isn't it? I know I was speaking to a hospital early on in the in the pandemic, for their kind of really high-end donors, just three or four at a time, they were getting one of the consultants to do a guided video tour around the hospital, as it was quiet and showing them how new facilities, were going to be etc, still having a really bespoke experience all be it, not in person. So I think it's about those creative ways of ways of engaging people and also another idea which I think I've mentioned on previous webinars, which I was told about at a conference by a kind of wildlife charity, dealing with a local area. And they got their Rangers while they're out and about to take selfie videos and say thanks to your gifts this year, our ducks on this pond are all healthy, this swan's had cygnets blah blah blah. You know, just like a 90 second clip which got emailed to their supporters within that area, is a bit of a personal update to keep the cultivation going, so it's creative ways like that I think that we need to look at.

**Andrew:** And also, I've had, I had a situation actually where there was a prospect dinner and what happened was the dinner was delivered by code, and came in a box, magnificent with a bottle of wine and various courses, and then you all got online and there was a facilitator and we had a chat on the thing and a bit of a presentation and we ate dinner a glass of wine and it was it was actually quite enjoyable. And I'm just reflecting on that because I can imagine we're coming up to a situation where we're going to need to be able to do a hybrid form of event, and even meetings, because with the

vaccination it'll take time to roll out will be done across different age groups and we know that, and there will still be some that will want to and will need to be shielding. So, they're often the people we really, really don't want to have excluded.

55:19

So I think our challenge is how do we create hybrid events not just online events, so that people can share online, as well as participate face to face, or in in a safe, distanced way, face to face if you take my point, you're gonna have to be really creative. That's a good question, Simon, thank thanks very much. The next one is from our mate Graham Pearce. The fellow Ozzy, great man, and still celebrating I'm sure the win against the All Blacks. Graham, your question, any recommendations for new trustee induction programmes and charity trustee 'indoctrination' engagement in our current circumstances and how would we go about adopting trustees just now, as well.

**Amy:** Again, it's challenging, isn't it, you can't, you know we can't grab a coffee or drinks and kind of get to know each other. And I would say it's about being as personal as we possibly can be in these times, you know, as trustees, you need to feel part of a team. So whether that's, you know, not just having a zoom call with all eight trustees on including the new trustee, but actually perhaps chairman of trustees might say, okay, every trustee will pick up the phone to Mr X /Mrs Y new trustee, over the next two weeks and have a one on one conversation with them to bring them on board and get to know them, obviously there's the usual packs that you can deliver in terms of written documentation and governance and what have you, but for me it would be feeling part of the team, and that personal approach.

Andrew: Yeah, and we're seeing that Amy with people being inducted into the businesses that they have have never worked in, you know, never physically visited them. Graham, I'd set out a programme, like on a day that's your induction day and a series of appointments with different people, Skyping in or connecting, zooming in these days, so that they get a full briefing, there's probably more opportunity for

them to engage with the full work of the charity now, than they might have done if you had to deal with a face to face, so good luck with that, but this is a key thing to focus on, because without the engine room, things start to grind to a halt. Now, we've got two more questions. Do you think we can clear them Amy. First one, okay from Grace. Grace Brearly, who asks us 'in April we're combining with another museum slash Heritage Trust to strengthen our offer and financial sustainability,' that's a good call. 'How would you launch a new trust to engage with donors, when you can't hold a face-to-face event.

**Amy:** Okay yeah, challenging. I mean I think you've got really interesting times ahead because there'll be the merger of not just kind of databases and all that kind of element but actually creating that new vision for the organisation. And that for me would be the key thing to make sure you've got right before any kind of launch is underway. What is the new vision of of this charity, and obviously, let's make that positive let's not say you know well, perhaps the two organisations are struggling on their own. It's about creating a new and stronger partnership and vision. Launching that, gosh, really, really challenging, I guess, obviously what you don't want to do is have that non personal mailer. There needs to be a way that you can kind of bring people together, whether it is small, small online sessions, webinars.

59:09

**Andrew:** Could you do a tease like have a have a strict live stream moment where you announce the name of the new trust or there's some celebrity that gets on and says something, awards something,?The point being is to get people to log on and find out something. Do you know what I mean as the launch, because otherwise they're coming for the, you know, for the networking and a glass of wine. I don't know but you can't do that by zoom not as easily anyway so it makes it a bit more of a theatrical moment.

**Amy:** Yeah, it could be using social as well, like you say you're having snippets go out... I don't know if you're using the social media channels and Instagram and Facebook and what have you, you know,

are there key characters in your organization as Andrew was saying - whether that's some fictional character that might get acted out in a museum or characters that are very well known who can do snippets and put that out and tell them the story of your new organisation and try and make it a bit fun. You know, everyone needs a laugh and, you know, something interesting to watch at the moment.

Andrew: it's got more akin actually to a drama production, or something along those lines that are a set piece corporate event. Yeah, for your launch Grace, that's, that's where I'd go because I think, depending on which which organisations are emerging, I bet you there's some great stories behind both of those organisations.

Okay, last question, again from our anonymous attendee who's offering as bonus points here, Amy, can you share an example of a cultivation event online that has been successful for clients? There's a bonus point here is if we can share a format where attendees have actually interacted with each other, meaningfully. Now that's interesting. Quite how you define meaningfully...what's your thoughts, Amy?

**Amy:** Well yeah, I'm not sure if this is meaningful, but I have heard of people playing online bingo and various other things.

1:01:10

**Andrew:** Very northern, Amy, very Northern.

**Amy:** Gosh, that is a tricky one, I'm not sure I'm going to get my bonus point.

**Andrew:** Oh, well I can share one. Remember I talked about the iPad thing. Yeah, this is the idea around when we were sort of safe socially distanced but not. You run an event for, in this case it was. Evensong, where, where a person was hosted by a live person at the evensong, who took them in it as an iPad, And, they went together, and sat and enjoyed the music socially distanced and shared and commented around it and got a sort of tour of and then afterwards went and had a glass of sherry with

the dean, socially distanced. And I think I think allowing just letting the shackles off and allowing a bit more freedom in the way those events run. It's going to be a bit risky but in other ways I think it's going to be much more akin to sort of experience you'd get if you attended yourself,

**Amy:** you know, really lovely. Really lovely anti loneliness idea though, isn't it, You know how, you know, are there is there an elderly neighbour who would love to have gone to that event who can't who you could take with you virtually. You know that's yeah, that's a really really lovely idea.

1:02:36

**Andrew:** Well, Amy, I think Graham's popping some more ideas up there in the chat, and I'm sure my friend Robert Brook who is in Salcombe and couldn't be with us because of technical reasons given his experience at Shakespeare's Globe, all those years ago raising a large bucket of money for that education rehearsal centre, no doubt he will let us know some thoughts as well, but that's the end of our q&a.

**Amy:** Brilliant. Listen, we're out of time everyone. Thank you so much for joining us today. We hope that's been helpful. Any further questions you've got drop Andrew or me a line, our details are on screen there. As I said we're recording, and we will post this online. Anyone who doesn't have a copy of our book already and would like a copy. This is, this is the book, gifted fundraising drop Julie a line for part one in the post for you. And again, if you want us to email you a copy of the survey once that's out again. Just drop Julie a note, and we'll ping that out to you, but thanks everyone. Stay well. Hopefully we'll see you soon. Yes, bye bye.