

# Winter Webinar Three | Getting back to Asking

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**Hosts: Amy Stevens, Chris Goldie, Andrew Day**

## SUMMARY KEYWORDS

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00:08

**Amy:** Welcome everybody. Thanks for joining us yet again we keep coming at you with these webinars, but hopefully they're being useful for you.

00:17

I'm Amy Stevens, I'm Chief Exec. I'm joined today by two of my fellow directors Chris Goldie and Andrew Day. Here today to talk to you about getting back to asking, which is something I think we've all been looking forward to, since about this time last year, and we are recording this webinar, it'll be available online, on our website to watch again in a couple of days-time for anyone who misses it. And, questions we usually do at the end, so please submit any questions as we go along through the q&a session. Try and do it through q&a and not the chat so we don't miss them if at all possible, and we'll pick all those up at the end.

00:57

So, we'll get started. First of all, setting the scene a little bit, so thinking about asking, and the principles of capital fundraising. So, what are the aims the principles of capital fundraising? So, we're aiming to raise as much money as we can as quickly as we can. And ideally, at least initially from as few gifts as

possible, so we regularly talk about that 80/20 rule, that 80% of your target will probably come from 20% of your donors. The methodology we use? Well in order to obtain those major gifts, as you'll know it's all about face-to-face cultivation and asking. And quite often running a campaign, whether that's for a capital project for a new build, or a new bursary programme, or a new members programme, it's quite often run in phases. So having that planning phase, getting all your ducks in a row, the private asking phase, and then eventually going public with more of a big splash. And what do good campaigns thrive on? They thrive on strong leadership, as we know, and momentum. So, building that momentum and encouraging others to make gifts by seeing the good that's happening.

02:12

Just one of our diagrams here from our book. Thinking again about running a fundraising campaign and everything that goes with that. So, all this background work that we do before we start asking but that is actually really important, and remains really important as we plan for campaigns, programme launches etc. From Information Management, prospecting, getting your database in order, allocating prospects for asking, etc, Takes us through those steps. Still really important that we do consider all this in a changed world as we're going to talk about and how we get back to asking. Because ultimately, the methodology does remain the same. We're just having to think about a changed world, and how we address some of the challenges and adapt to some of those challenges as well.

03:06

So, thinking about COVID-19 and negative impacts we've seen over the last year or so, in terms of fundraising and how that's impacted us as fundraisers. So, organisational priorities changed dramatically dependent on what kind of organisation you're working in, or volunteering in as a trustee, or leader. Whether that was you were about to launch a major fundraising programme and actually had to refocus and think about revenue fundraising at that time. Capacity, was a huge issue, for many with furloughed staff. Obviously, there's a reason for furloughing staff but that also means that the fundraising team isn't there to drive forward. So, you know, difficult challenge. We have no large

gatherings, as we all know. I think a lot of us are looking forward to large gatherings. But that meant that we couldn't hold those larger cultivation events, we couldn't bring supporters together and share information about projects and exciting plans. For the donor, lots of uncertainty about family finances for example, you know, there were perhaps donors within your organisations who were on furlough or taking pay cuts or even lost employment. And, even for those who haven't, there was so much uncertainty there, that there was a lot of worry about 'can we ask people to commit, at this time?' because of that uncertainty. And again, when will it be over? Well, hopefully, we have the roadmap to take us out, but, when will it be over that, that question was on everybody's mind, and really did impact fundraising in the last year.

04:53

But we also have lots of positive impacts of COVID-19. Now you probably think I'm insane by saying, COVID-19 had positive impacts but there are some positives to take from the situation. And it does give hope for the future, in the sense that, you know, projects that are being planned now. people are excited about. People want to move out of this horrible phase that we're in, and look forward to better things. So actually, we're seeing that, when projects, visionary projects, are created, donors are engaging because they're looking forward to seeing what the future will bring.

05:31

It's caused us to embrace the online world. Who would have thought we'd have been doing webinars every month, every other month, a year or so ago? But it's given us new ways to communicate and for fundraising that's really important. It's created urgency for fundraising, so think about those projects where perhaps you have an anniversary date looming and need to mobilise. Really important and urgency, makes us act, makes us think quickly, makes us get our house in order, and our strategy in order so we can fundraise effectively.

06:06

But it's also made people, we believe, more altruistic, more accessible and more understanding. So, we've seen lots of increased giving dependent on different groups this year. So, Giving Tuesday in December, was up 42% on the year prior, just over £20 million.

06:28

We've seen high net worths giving back at the same level that they were previously. Well what they have started to do, is the trend we're seeing, is not necessarily spreading their gift as they might have across various organisations, but actually giving everything to the one that they feel closest to. We have seen individual giving levels drop, but those who are giving are giving more. So there's a balance there. And then making people more accessible, so we found which Chris and Andrew are going to talk about shortly, when we're doing feasibility studies for example, being able to reach people and book in and meet one to one virtually, it's been so much easier to get in people's diaries. We've been able to act quicker and deliver pieces of work quicker. And it's also made people more understanding. So I think now, amongst donors, there's a lot more understanding, if you approach your supporter base and say 'Hey we have a problem. This is what's happened. This is what we need to tell you, you know, this is how we're going to resolve it,' - and donors are engaging with charities and having those discussions are not necessarily looking at that negatively, but actually looking at it that, okay, we have a situation, they've been honest, we want to help, how do we how do we help move this forward?

07:53

So there are positives to the last year. And there's more positives for charities. So, charities will become in the long term, more resilient, through this process. We conducted a survey in the autumn, thanks to all of you who filled that in for us. But we found that it was 86% of all those who responded said they would revisit their strategy in some way after this pandemic. Whether that be slight tweaks, or a complete overhaul. But I think what COVID has done is make charities, assess their strategy and those where they perhaps not diversified their income streams and relied too heavily on certain income

streams will be more resilient in future, because they'll have created a more broad-ranging strategy that mitigates against this kind of event happening in the future.

08:46

Also it's been reported in the last month or so in the news, that we're seeing the highest levels of savings amongst people in this country in decades. Some of us have been hit by furlough, by pay cuts, etc. But for others, they've been working from home, they've not had travel costs, they've not perhaps had nursery costs, and have actually saved significant amounts of money.

09:08

Again, lower debt levels. So, it's been reported that people have been paying off credit cards, etc. With that additional money that's been saved through lack of travel etc So lower debt levels, and in some circumstances increased wealth. So, like I say we've heard from high net worths who were saying, you know, we're still giving, and we are still making money. And corporates as well, some corporates dependent on sector, obviously, have been hit significantly, but for others, they've seen a huge boom. And we've actually seen, we assumed at the start of the pandemic that corporates would not be givers during this year, but actually for a number of clients, we've seen that they've really stepped up and have been big givers. So, it's not all doom and gloom, there are a lot of positives to take from the situation.

09:58

And I'm gonna pass to Chris now to talk about some COVID-19 myths for fundraising, you're on mute, Chris.

10:10

**Chris:** Thank you, apologies for being on mute. So, the myths, and we've heard these consistently over the last year. 'it's not appropriate to ask', I was asked to start a study at this time last year and the client said no, we can't possibly ask anybody to talk about money at this stage. Well clearly as we discovered over the course of the year through literally hundreds of interviews, it is perfectly appropriate to have

conversations about money, and as Amy's just said, lots of people actually are feeling quite comfortable about their money, despite the uncertainty going on.

10:42

'Other causes are more important.' Look, clearly for a lot of our clients, they have perceived that issues around social welfare, health, disadvantage, poverty...these are very important causes, but they're always important causes. They may have been heightened during the COVID 19 pandemic, but it doesn't make your cause any less important with your supporters. We've seen in the theatre sector, for example, huge support from people who bought tickets translating that money into a donation to help the theatre get through. We've seen it in sports clubs, we've seen it in churches, we've seen people respond up and down the country to their own particular causes. So, I don't think it's fair to say that other causes are more important than your own. Other causes may have different strengths, but your calls will always be strong and powerful and important to your own donors. That leads on to the fact that prospects do want to hear from you. It's a myth to say they don't they do want to know what you're doing. They may not always want you to be asking them for money because they may feel under pressure themselves, although our experience would suggest that most don't.

11:48

But they certainly want to know how you're getting on. And so, we've seen some great examples of stewardship, across the course of the last 12 months. Whether that's Year Seven students signing Christmas cards to the oldest alumni. Whether that's telephone calls, buddies you know, all sorts of creative ways that people can stay in touch with their prospects, but it's very clear that prospects do want to hear from you, they have wanted to hear from you and they will want to hear from you more now we're emerging hopefully from this awful pandemic. And that of course led to the myth that all capital campaigns should be suspended and I'm afraid in our view, clearly was not the right way forward. Capital campaigns as we said at the very outset, rely heavily on momentum, and to gather that momentum you really need to be able to drive your campaign and build support. Now that may not be

instant cash support but all the time, you're building awareness, and you're moving forward your campaign, so it was very important in our view that people shouldn't cancel campaigns or suspend campaigns, but we know it's happened and one of our jobs now is to help people get back on track.

12:58

So that's just a little bit of a background as to what we have done in the last year. We've conducted 13 different feasibility studies, we've conducted four strategy reviews we've held over 400 interviews, virtually all through this media, and as Amy said before, it has become incredibly easy to arrange, set up and meet with people online, and I don't know about you guys but I have found that more and more people are comfortable speaking online. They're more open and honest, they're candid, they're relaxed, maybe they're at home and they're relaxed. Very often, you're speaking to a couple rather than just one individual and that can have huge benefits in fundraising terms. And it is equally possible to ask people. The asking process we have seen in the course of the work and most of the work we've done has been feasibility studies, but we have had some fundraising campaigns going on as well, we've seen eight, six figure gifts we've seen 20, actually probably 20 plus five figure gifts. Virtually all solicited in some way shape or form through a virtual conversation and we'll come back to that later on.

14:04

So, we need to adapt. We need to adapt to this post COVID world that we're emerging from. We know now that it is harder to meet prospects in great numbers, but that doesn't mean we can't meet them at all. We do rely more heavily on virtual communications but that's no bad thing, it's a far greater platform now, people are more comfortable with it than ever before and therefore your visuals, your technology, your displays your presentations need to be great. They need to be the best they've ever been, you know, brochures, were great in their day, but we've now moved to an online world and we don't think that anybody's ever really going to go back to the physical. Yes, we'll meet people in person but we'll be handing them brochures, actually we might be showing them things on iPads. We might be talking through a project, just by standing and displaying the visuals, so those visuals are really important.

14:50

You can strengthen your case for support, as Amy hinted at earlier, there's urgency about the fact that we're playing catch up in a number of cases. But also look at the implications of COVID on your facility. If you're a school, maybe you've got to think about social distance and you've got to think about flow of students through the school, if you're a cathedral, can you get everybody in for prayer? We're hoping that come June, 21, things will be back to normal but realistically Is that likely to happen? Will we need to adapt our facilities in the future to meet future pandemics, and that's all part of your case for support going forward. So very important that we react and take the positives from COVID and turn that to our advantage in this post COVID world.

15:35

What did we do before? Well, the classic campaign model was to invite people in to meet the boss, whether that's the chief executive, the dean, the head teacher, the artistic director, whoever it might be, whatever your particular organisation, the invitation to meet the boss was very important. It was a way to present the project in person it was a way to distribute information packs. It was a way to be able to stand in front of a PowerPoint, walk around, use your fingers, use a pointer to demonstrate the strengths and weaknesses, and the strengths in particular, of your particular project. And from a fundraising perspective, to be able to talk very clearly through the fundraising, the giving options that present themselves to those in the audience. But it was a great way of being able to do it and that's very much what we used to rely on. We'd hold information events. Some will be medium sized externally maybe hosted in people's houses or gardens, some would be in a neutral facility an art gallery, a small restaurant. And we'd try and hold larger events on site. So, you know, we'd be inviting, if it was a school, we might try and invite the entire year group, if it was a cathedral, it might be the members of your electoral roll - but you'd look to gather a large number together to present your project and deliver it all through an information event for which you would follow up with your prospects, and then you'd obviously try and cultivate your major gift prospects socially through lunch and dinner. Now



clearly these are all things that were very much part and parcel of any major gift campaign, that in the main have not been possible at all. During the last 12 months. They will be possible in the future but we're gonna have to approach them in a slightly different way. Because as we all know numbers may well be limited.

17:20

So, we can engage with our individual prospects, you can still have your one-to-one visits. Now that does of course rely on your prospects wanting to travel. We're seeing particularly in some cases at the moment, where we may be appealing to a slightly older demographic, there's still a reluctance, for people to leave home and come out. Now that is changing, thanks to the vaccination. And so we've actually found in the last month or so, a far greater interest in accepting invitations to go and have a cup of coffee, to go and have a chat, to look around the project. So, really focus on those moving forward. We can do them now. But if we have to, we can still cultivate and we can still ask virtually. As we've discussed already, people have very, very comfortable sitting as we are all now, in front of our seat in front of our computer screen, having a conversation, relaxed, comfortable, providing if you like the platform to go forward and make the ask. So don't discount that possibility, but of course, if you can try and get back to that one-to-one visit. But of course, while you are cultivating online, you've got this fantastic opportunity to share your information in a really personal way. You can take your time, as we're doing right now, you can present during a zoom call very easily. You can engage during studies, as most of you will know, will share a scale of giving. We always used to rely on that very heavily as a way of monitoring where somebody's interest might lie. We've found that it's equally possible and equally successful, to be able to do that through virtual presentation, by talking about levels rather than necessarily pointing to them. The same with PowerPoint presentations about a project. You've got far more scope, maybe on a zoom call, to demonstrate more broadly the full extent of the project.

18:58

You can even hold information events online. You can split up your audience, you can divide people into groups providing you've got enough Home Team people there. You can have those intimate conversations with people, whilst returning to the main agenda later on. And of course, you can still do it in person, or rather, after March the 29th or April the 12th, you'll be able to get back to in person, within government guidelines, meeting. So that may be that rather than have an information event for 12 people, you only have it for five or six, but that can still be in a major gift campaign context. Really important and very valuable. So small intimate gatherings are the way forward. Try and work on planning those over the course of the next few months to really take advantage of the opportunities that this release, or semi release from lockdown is going to offer. Andrew over to you

**Andrew:** Thanks Amy, thanks Chris. Hi, everybody. Nice to see some friendly names on the list here and I hope you find this helpful. Can I just say, I mean, some things have changed and some things most certainly haven't, but the basic principles of what we do and what we know work, have not changed one bit. We know that an urgent and compelling fundraising case, something that really engages your prospects, is as relevant now as it's ever been. What we've got to do is make sure we think again and refresh that, in this new context. We know that people respond when they're approached personally by somebody they know. We know how effective peer to peer asking, can be in bringing in really major gifts. So, and we know, even though the charity muggers as I used to call them or chuggers outside the tube stations aren't there very much, if at all at the moment, the reason they were there is because 80% of the time, when they spoke to someone personally, even if they weren't known to them, they did something. So that personal engagement is vital if you're going to get a high level of response rate rather than writing, emailing or bombarding through other social media. But the crucial thing many don't appreciate is that when you're talking with someone about making a gift, a meaningful serious gift here, that it's during that conversation that the level of their giving increases, that their thought processes turn to the practical, tax efficient pledging ways. You know through recognition and otherwise, that they can really do something to get onto that scale of giving, or make an

impact in helping achieve that urgent and compelling case. So, there are things that have changed but the methodology has remained exactly the same. And the first step is obviously to get involved, when you're planning one of these virtual hybrid cultivation events, is really think through the plan, it's going to be challenging to begin because you've maybe not done this before and hopefully there'll be some tips from today that will help you with that framework. But once you've done it once, twice, two, three times, you learn and your colleagues learn from the process, it will get easier. And the point is, it is probably something we're going to continue to do. I mean I know for example at a church I'm working with in London at the moment, its congregation has grown exponentially online. They're now having people attend and give from New York, and that that won't change. The need to engage those people will still most probably be in a hybrid or virtual way. So, these tools are tools I think we're going to carry forward, we're going to evolve, and they're going to be part of our normal, you know swag of activities that we'll have as professional fundraisers. So, plan carefully, think it through thoroughly and we'll talk a little bit more about that in a moment. The next piece is around your invitation, and understanding that again, that needs to be delivered as personally as possible. People need to feel part of the group that you're inviting to attend one of these hybrid information events, cultivation events. It's important that it's not a mass gathering. This is not a broadcast to 1000s, and in doing so, you can encourage and elicit responses that are more personal.

23:10

And then in delivering the actual programme, make sure that it's kept nice and sharp, that its, in production values and so on, really put some time and effort into pre-recording possibly some pieces in it. And crucially, think about at the end of that information event, that cultivation event, think about how you're going to manage the next steps. As you know, many of you've worked with us before, at the end of our information events in person, we've used response cards so that those who attend can send a really clear signal about what they would like to do next. Would they like to make a gift? Would they like more information? Would they like simply to say no and good luck, and that's fine too. But at least in getting that clarity, in removing the ambiguity of what's happening next, you can focus your scarce

fundraising resources, usually your time on those prospects that are most likely to convert, and you can plan that follow up process thoroughly and carefully in a timely manner so that people aren't left behind.

24:16

So let's have a look and I'll call on Amy and Christ to share please. Some ideas about getting creative for these events, we've seen cooking classes, that's been really good. I'm sure I put on some weight over this period, and too many dinner parties and zoom drinks to recover, who knows? But there is themed things we can do as well to showcase some of the case. I don't know Amy? Chris? Thoughts? what's your view about being an iPad buddy?

24:43

Chris.

24:46

**Chris:** There are all sorts of things you can do and it's a great opportunity, you know, if I talk around a school sector, for example. One of the greatest things to be able to do is to use pupils to go around and record messages to show people around the school, to be able to share information in a very modern virtual way. It might just simply be on a phone, it might almost be like a personal FaceTime call but it's really personal, it's really direct, we've seen invitations go out accompanied by bottles of wine or boxes of chocolate, so some things that get everybody to join at the same time. We've seen things like use of online surveys or re engaging with people. Just to go back and say, 'what do you think, you know, we haven't spoken to each other for a long time?' Some of that can be done in focus group forums, large group gatherings. As long as they're well managed, these are great ways of being able to rebuild relationships with people - and that first step is not necessarily always a question of diving straight in with the one to one, face to face, so use the opportunities to build that group community sense and be creative. Amy's probably got lots of different ideas about this?

**Amy:** Yeah, just thinking about your audience. So, you know some people have done, as Chris said they've sent every attendee a small, you know, one of the many bottles of wine which is like a glass of wine and a cheese selection. But actually, think about your audience. So one of the youth charities that one of our other directors is involved with, did a tea and coffee and hot chocolate and marshmallows kits or similar as if they were around the campfire together, and that fitted that organisation and their supporter base. So, it can be really creative - and think what might appeal to your supporters and build something. And again, meet the specialists. So, for major gifts, you know, are your hospital where, you know, your top five major prospects might love to speak to, head of oncology, or, or whoever and have their questions answered, personally. Lots of different ways that we can work it, so it's not impossible to hold really fun and engaging cultivation events online.

**Andrew:** And it doesn't need to be too slick. So, I mean if you've got a couple of iPads around and some people that are prepared to effectively host someone on an iPad, get them online with FaceTime or some other online meeting technology, and the person is the iPad... so let's take that person now off to see why their gift this year has been so important and what it's actually done. You know, whether it's with you, Louise in the Youth adventure Trust in going into see the preparations that are being put in place for this summer's programme of work you're going to be doing for the young people in the southwest. Or whether it's you Sonia at Gloucester, taking that iPad out to the stonemasons that you've been able to raise money and keep working through this period, so that the donors can see that work happening and it's a really personal engagement, even though through an iPad. So, iPad buddies are a really, I think simple, easy way of running many information events and bringing your urgent and compelling case alive. I'm sure you guys have got lots of other really fun and creative ideas, but it's certainly worth taking the time, as I outlined just in the previous slide, to plan that process and think carefully, but once you've done it two or three times, it'll be like falling off a log. So, okay, let's have a look where we were then... Gosh Can you remember a year ago, March 2020? What a year it's been, and really, in some places, I mean it's been a bit of a plus to not have to tear around the place and get

some time in the garden and sort of, you know, I've got a dog that's exhausted, for example, I think after this year of walking. But, I think I think we need to remember where we are in our fundraising story, what were you doing last March. And what happened? And I suspect what happened was that unravelling feeling, as the threads were pulled away, as that perfectly developed plan for the new financial year about to begin, most probably, was piece by piece, dissembled before you. You may have even been put on furlough, many, many were. You may have had to come back for a bit and go on furlough again. And you've seen colleagues, stepping in and out, and a huge amount of uncertainty was pulling. It's like a dead weight on the plans that we'd all work so hard to prepare. So, it's important if we reflect then, what can we do now to pick up from there? Now there were four stages that I suspect many of your sort of fundraising programmes were in. You may have been in the concept stage. So, you know, if you were just developing the concept for what you're raising money for, getting that case put in place and tested, and so on. You've probably had a good time over this period to get underway with some of that planning. And as some uncertainties have been removed, to start to put down some firmer timelines and fundraising target plans. You've also, you know this is a chance also, in some respects in looking back then as you look forward now, to review your development officers' capabilities. Maybe you need different skill sets now? You know, and maybe you're going to need more digital marketing support than you're going to need print, as Chris was referring to a moment ago. It's, I'd be surprised if your prospect research doesn't need a bit of a refresh as well, because as we've been saying, the money's there but it's moved, you know, lower levels of indebtedness means that people have the spending power, that much higher level of spending power but then for some they certainly don't, because their businesses have been on ice, literally, for the past 12 months. There are opportunities through this concept stage to consult internally, and to really be sure, is what you're talking about now needed? Is it really urgent? And in some ways, is it appropriate? Right now, in a post COVID or coming out of COVID world to be presenting, you know, a project that may be seen as being about polishing, rather than fundamental needs. Is that the right moment to be bringing this project forward?

31:06

And I think that there needs to be in this concept stage a really clear understanding that life will be more certain, and in the planning that you're doing, you need to test and make sure where your ground is so that you can be clear, as the plan is taken on to the next stage. Thanks Amy. So, the early planning, that is often done in campaigns is now having done that concept development, is about taking it out to the world. And you really don't just now need to delay any longer in taking those concepts out. It's all about the importance of doing a feasibility study very often. Now this is a qualitative and quantitative process. So, studies right now can take much less time, they can be often much more effective as well. As Amy and Chris were saying earlier, you can reach people, you couldn't have hoped to get to for months, you can get to within days now.

32:03

But also, it's a really interesting sort of engagement online, talking with people. What I'm finding really of late is a lot of people have had enough of screens and will talk to you happily for an hour on the telephone, rather than have to deal with you on Zoom which is quite interesting. But I think the crucial thing with the qualitative side is you must spend that time talking with your institutional godparents, to not only understand where they are now in coming out of of the last year, but also to build and rekindle their interest in the possible project. If you don't do that personally, and take the time to do that, then you won't have the wherewithal to start assembling your fundraising teams. In other words, you won't have that ready pool of potential fundraising leaders. If you just do it by survey work, you'll have some pretty graphs, but not very deep relationships necessarily or commitments to pursue that fundraising case. But studies are well worth doing, they're a very important step in any campaign, but right now they can happen more quickly and can be more effective than I think I've seen in my 30-year career.

33:13

So, the next step is really about starting the private phase. Now this is, you may be at that point, you know, ready to launch, you've got your study done, you've got a clear view about where your leadership is and where your potential major gifts are, but it's worth reflecting if that's where you were 12 months ago, and you're now approaching 2021, just double check, is that Case for Support actually strengthened or weakened by COVID? Is it more urgent or less urgent? is it more compelling, or is it less compelling? Has its shape been changed? Might you reorder some of those priorities and give greater emphasis to different messages within your case.

33:55

Likewise, look at your campaign plan. The technologies accessing people etc has changed, does that need updating? Would you change your milestones in that, and just allow for people to, if you like, gain more confidence in coming together? Particularly if you're trying to run more face-to face events, there will be certain groups of people that will just not be as comfortable coming out, even after two jabs. So, I think that you reset or recalibrate your timelines there would be a good idea. And also, again, refresh and renew and look at your leadership. There is new leadership there. There are people that have become a lot more active in their community lives and have become, in many cases, much more committed givers over this past year. Don't ignore them now because that could be a fantastic new resource for you. And, as we've discussed many times, your comms strategy is bound to need a shake down, and we're so much more online and more digital and that if that's not reflected in what you're doing, online giving in particular and online giving tools have taken a real boom.

35:03

But as ever, as we've discussed many times before if you've been on our webinars, it's remembering the 80/20 rule. That you need to focus on your best prospects. They're probably in a major capital campaign, no more than 25 - and certainly, half your target can be achieved in a relatively small number of prospects. |Grant funders, of course, individuals, and your business community. But that focus is really the discipline you need to be effective and successful in your capital campaigns. So,



when you did your study, a year ago, you can be sure it's very different than it is now. So the findings need to be refreshed, and as I say, those items above need to be addressed.

35:47

So, stepping on from that. I just wanted to mention you Sonia, with whom I've been working over the last is it early 18 months two years? But Sonia and the team at Gloucester have done a brilliant job. We were starting a feasibility study and just starting. And, of course, COVID hit, and no tourists were coming to the cathedral. And there's a very, very large overhead of stonemasons and everybody else trying to keep this extraordinary place up and running and alive. So, Sonia and her team wisely changed course and we ran a full public appeal. And I think nearly a million or just over a million was raised and celebrated on Christmas, when people were coming together virtually and otherwise. It built relationships, it built confidence in the cathedral's capacity to be there. It was the beacon of hope appeal and I think it's set the course for a successful exit from COVID. And now we're back, we're finishing the study and I promise to get that finished soon for you Sonia, it's another interview today, but the point here is that we lost through this somebody who died, sadly, as a Chairman. And so we're having to find new leadership, that too is actually presenting opportunities for generational change. So, out of tough times can come much brighter ones. But the but the flexibility, the agility, if you like, of the cathedral's strategy has now put them in a very good place to be successful with their next major capital campaign.

37:20

**Amy:** I think that shows it's well, doesn't it Andrew that we said right at the beginning of the pandemic, if you reach out to your supporters, they will want to help you. And this is a perfect example of saying, right, now's the time to step up, we need your help, and you've seen that tenfold at Gloucester.

**Andrew:** I think sometimes we forget, because we're so interested in asking, we forget what's in it for the giver. And there's an enormous need to give. It is a human response, and particularly during

something as dramatic as we've seen in this pandemic, people really have had to pause and reflect on the things that they really valued, that are so important in their lives. And that's been reflected in their philanthropic responses. You know, and it certainly was at Gloucester. And yeah, so I, you know, congratulations Sonia to you and your team, but I think it's something we've seen reflected in many other places too. But as a result of not sitting on your hands for the 12 months Sonia, you're now in a much stronger place to go forward. With big capital campaigns. But there will have been some, too, that 12 months ago were actually starting, with a public phase of their campaign and must have had the wind taken right out of their sails. So, it's about refreshing your plans. It's about relaunching your campaign with confidence and optimism, because you will have thought through and revisited your case, you'll have fostered your volunteer leadership. You'll focus as these little symbols say here, on what's important rather than what just is urgent. You will also celebrate those winning moments and I'm sure there are many stories that can be told as I've just shared with you from Gloucester's beacon of hope appeal. Crucially, it's about the communication and really putting energy and resource into that and being very task oriented. But you've now got multiple launch platforms that people are familiar with, whether it's in person asking, written communications...actually some of the best donor stewardship this year has been the simple thank you card in a handwritten note saying, you know, thank you. You know, and it's because people have really valued actually getting some personal post, and have read it and really felt that a message from the dean or the headteacher or the artistic directors, that personal note, as really, really had big impact. Of course, there's our online, but also local PR as we're shopping more locally, we're actually engaging and taking much more local news and PR is a good vehicle for doing that.

40:01

You need to think again and reflect on the different ways that you can engage with your prospects as we've talked about. And there is now a greater need than ever for volunteers. Remember the strongest way people can be asked for money, is if they're asked to 'join me'. 'Join me' from a powerful Ambassador or peer, or somebody that they relate to is a very compelling request for funds. And so,

those volunteers are invaluable, and their recruitment must form the first part of any successful campaign.

40:36

**Amy:** Thanks Andrew. So just to kind of bring everything together with some clear next steps and recap a few points, so five clear steps that we would recommend, regardless of where you are in your fundraising journey in terms of campaign at t this time. First of all, revisit that strategy, and mobilise your leadership. So, you know, time really is of the essence. Is your strategy right to take you forward from this point onwards? And really important is your leadership behind it? Do you have your board's support and is everybody behind this vision that you want to take forward? Focus on the impact, so is o small church I was working with, for example, had a very heavy heritage focused project, which was at the National Lottery Heritage Fund. In March of last year, it got withdrawn because of t COVID, etc. And actually they've really had to think about their project now and go, 'Will this project get funded now, or do we need to look at, you know, more along, how are we supporting the local community, etc,? But also does that work with our project? We can't create a project for project's sake. Let's make sure that what we're doing is actually a viable fundraising campaign and has the impact we need it to have. So really important to think about your case and its relevance in today's world.

42:12

And let's use virtual communications to our advantage. We've all talked about this. All three of us today. you know, initially, everyone was terrified at the thought of constantly being on zoom but actually how useful has it been, we've been able to function, keep working, connect with people, and let's use that to our advantage going forwards.

42:32

But let's not forget what has happened. So, as we move forward, there will still be questions from your supporters, from potential donors, about COVID and post COVID concerns, so let's address those.

Let's make sure we've got the answers and we can say look, our charity is primed, we know what we're going to do if x happens if Y happens, we have plans in place but we're looking to the future.

42:55

And finally move forward with certainty. Let's have some positivity. Look for these visionary projects that you know you can all deliver because donors want to buy into that at the moment. People want positive things to invest in, as we kind of rebuild community, and the economy, and everything else as we go forward over the next year. So hopefully that's just a helpful kind of recap. Now Chris is going to take us into the questions if we've had any coming in.

**Chris:** I am but we haven't had any coming in as yet, so I don't know if anybody wants to quickly hammer one out there. It would be great to have a couple of questions. And I think, overarchingly, here what we're saying is that this is a time to be really positive and upbeat, and really go about your business as professionally as you probably can to get back to the basics of great capital major gift fundraising, but really turn attention to how you can adapt to the world that we now live in. We now have had a question though. 'Is there a calendar of key dates for charitable giving, eg small charities week. Amy I'm going to throw that over to you, obviously giving Tuesday in December but I'm not sure there are that many others that I'm aware of.

**Amy:** No, not that many. And there's obvious ones like there's regular kind of legacy weeks and things like that throughout the year. What I would always say is, fit that with your charity, and when best, you know, create your own schedule of events and key dates, when best suits your charity in your fundraising timeline. Let's not rely on, you know, days like giving Tuesday, etc, to dictate what your timeline should be. It should always be focused on your time frame for delivering the project you need to deliver.

**Chris:** You may see it in chat, it's addressed to everybody both panellists and attendees But Claire Atkinson as the deputy chair of IDPE, a client of ours, has reminded us of Schools Week of giving coming up in the autumn.

**Andrew:** Sometimes too, I mean we've been talking at Peterborough Cathedral, Amy and I, about Patronal days. St Peter's day has been a great opportunity to actually invite key donors back into the cathedral and publicly thank them for their gifts, to give them their blessing, if you like from, from the dean and have that public moment of celebration for what's been achieved. So, there are dates that are right for your organisation, not just your Patron Saints Day, but there will be moments at the beginning of ends of school terms, no doubt. Those moments before a school play, whether it's all online or not online, or a concert or something. You cannot ever thank your donors too much. And what we often forget is that thanking is the best form of asking.

45:59

And so, so I would build, you know, every moment you can over the next year to thank and thank again, as a way of helping stimulate your asking programme.

**Chris:** Now the questions are now flooding in. So, I'm going to run through them. The first one, 'meeting virtually has been great, but is there a danger of prospects, particularly major gift owners, just opting to meet on Zoom which isn't as effective in getting your case across?' My own view on that is that of course that is a danger, but actually I think we are, I think you'll find that the world is looking forward to getting out there and meeting people, again. You know, don't be fobbed off by the system. Have a personal meeting, and perhaps take advantage of the fact that you can demonstrate physically, something that you can't demonstrate virtually. So, find that thing that might be that you can take people to that you can actually take to them and show them. Amy.

**Amy:** Yeah, I think for some, it's actually easier. So, one of my six figure asks this year was one of the quickest conversations I've had. it was a telephone call. It saved him a lot of time because he didn't have to block an hour in his diary for me to sit in front of him and present exactly what he was going to give to. He knew what he wanted to do, 10 minutes we were done, gift secured. So actually, I completely understand where you're coming from with the question, but there are scenarios when actually it might work in our favour.

47:25

Andrew, any other thoughts on that before we move on.

**Andrew:** I know, I just think even online if you can use an iPad buddy format, take them into the project or to where their money might be impacted. Even if you can't see them face to face, use the technology to, If you like be as personal and as enlivening around the case, to get them close to where the money might actually go. Show them the bits of things falling off a wall in the cathedral or the back of the organ you know, if you take my point. I appreciate, there is that double edged sword because the technology is enabling us to get to more people, more quickly and more efficiently, but there isn't the same investment in the process, because you know they're not sitting through a lunch and going through...do you know what I mean? You're not able to warm them up in quite the same way.

48:22

So probably planning a sequence of events or connections, rather than just having one, two-hour session on Zoom, which would do anybody in. Maybe have an introductory one and then a comment from somebody else, then a visit to something, to then bring it to a close. I'd break it up. If I had to do it online.

**Chris:** Okay, let's keep going through. So, another question, 'starting from scratch, where can we begin re business giving?'

48:50

**Amy:** So, is that with no corporate programme in place?

**Chris:** I'm assuming, so.

48:55

**Amy:** So, from my perspective, that would be about leadership, it'd be about consulting with some of key business leaders locally, and not necessarily you know, the multimillion pound, some of the smaller businesses. What we've actually seen this year is actually a lot of businesses which have grown dramatically this year, have started stepping up, but still aren't huge businesses, are stepping up and getting involved. So my first step would be to consult with some of them and create a small team to help you build that that network, and start peer to peer asking within businesses.

49:30

**Andrew:** Can I just add Chris, that I've seen a number of the local business leaders talking about mental health issues, and stress on staff and cohesion. Their own team's cohesion as well as within the community.

49:47

And it might be thinking about what can we do as charities to support their business teams, so that, in a sense they feel as if they're doing something worthwhile by working within that business. I think there's more opportunities here, I know a lot of that's been done with some of the social welfare charities, but it can, you know where banks would come and paint a room. Or the employees would do a work day and whatever. But I think there's an opportunity there for the stakeholder reflection on why that business is a good business. You know, that's where they're giving or business giving can be directed, rather than, you know, up in billboards.

50:29

**Chris:** Okay so the next question, 'We've talked about the importance of having engaged seniors to support fundraising efforts. How do you overcome this if they're not as engaged as they need to be?' I think, I mean I'll kick off on this one, If I may. Patience, only because I'm working with a client at the moment which has a lot of senior engaged prospects who we have been trying to communicate with and we have started to rebuild relationships through virtual, through telephone, and as we referred to earlier through written communication, but in a very friendly social way. So, in fact we're reestablishing the relationships that have already existed. But they're also saying to us, you know, where can we go to give online, how can we give online? Because they have had to respond and react to the way that Coronavirus has impacted on their own lives. So, it's to be able to combine the two.

51:16

Obviously, trying to invite them in is there but if they say they're not prepared to come in yet you've got the opportunity to lead them to something, take to something that they are now more comfortable with and they were this time 12 months ago. So, I think, don't be scared of attempting to engage senior prospects with online technology because the vast majority of them are far more comfortable with it than they were before. But of course, if you can get them to meet face to face, as in when they're comfortable.

51:44

Okay, the next one is a question from a lady who is with a group making an old chapel into a theatre, and she said 'could we create our own week of giving? A re-launch of the activities taking place. But of course, you could! Very good idea. Use opportunities. It's been talked about before, whether it's an anniversary, whatever it might be, use an opportunity to bring people in, to grab people's attention and if you can't make them happen in great numbers, make sure that it's out there virtually whether that's a stream on YouTube or website platform, whatever it might be so more people can share in the in the week. Absolutely, that's a great idea.



52:21

An old friend of ours, a capital fundraising consultancy saying stop capital campaigns in COVID times is rather like two turkeys voting for Christmas. You're quite right, we obviously didn't, but we do know someone who did, and we're quite surprised to hear about it. But we've clearly said that capital campaigns are still vital. Do you think the balance of fundraising tools, annual legacy capital has changed or as a result of COVID?

52:46

**Amy:** Interesting. I think that there was a definite push last year to work towards annual revenue because people had urgent needs to meet, didn't they?

52:58

But I think actually it will return to normal. As capital projects come back online, people will still be making legacies, people will probably be more aware of their annual revenue, revenue costs for charities now, and what charities actually have to go through each year to meet running costs, such as hospitals, etc. I think there'll be more awareness of that and perhaps more support of it, But I think from my perspective, I don't think it will fundamentally change the funding mix. What about you guys?

**Chris:** Well, I think it's interesting. So, I think some people have very urgent capital needs now. You know projects that have been delayed because of COVID for whatever reason. It may be that, you know, architects were delayed, planners were delayed. There all sorts of reasons why projects been delayed, and therefore actually the focus on major gifts, the private phase of a capital campaign is possibly more urgent now than it's ever been, because you're sort of playing catch up and therefore the need to raise that first million that first half a million, whatever it might be, which you're only realistically gonna do through a concerted intense major gift programme has to be the way forward. So, I think, overall, long term the balance will restore itself, I do think naturally we had this priority this focus on

annual fundraising. I think there was a little bit of uncertainty around how do you go about legacy fundraising in a, in a period of pandemic, but I think we've seen through that and Amy can talk more about the stats on that one, but I think very clearly there's been a decent response there. So, I think the balance will restore. I think there was a preference for annual funds because that's where the clear need was. We've seen that reflected in the way some grant makers have approached their funding. That a lot of them have simply not accepted capital applications in the short term and chosen to focus on core funds, annual funds. But it's returning, it's restoring and I'm willing to bet by the start of next year, a full balance will be fully restored and we'll be back on that even keel.

**Amy:** Yeah, absolutely.

**Andrew:** It's funny though I think those that have done their homework over the year and have capital projects ready to come out now, will actually steal the march on, on some of the big grant funding. Because as the grant funders shift from the sort of unrestricted support funding they've put out there, back to their normal, you know, mission and objectives, they'll be looking for viable projects. And I just think there'll be a lag as they come forward, so, so well done, you guys if you've been doing the work during the year, getting all your detail and preparations done for your capital campaign. Can I also say that those people that have been giving unrestricted in their annual gifts, you know sustaining funding through this year, those donors, if you'd like, they're a new crop. I mean you've got an opportunity there now to communicate with them about the vision for this next part of your organisation's future. So, again, it's probably worth looking at them very carefully and how you're going to design your comms to engage them in the new vision.

55:58

**Chris:** Okay, last couple one is a very straightforward question, 'Will be sharing slides?' Well, we, if you email us we'll share the slides with you but the webinar will be live on the website but if you want to send one of us an email, we'll happily send you the presentation. And the final one, then, 'After effort

and expenditure, we did the first step of the legacy part of our campaign. From March this element was necessarily put on ice, how can we resume this quite delicate task?'

56:26

**Amy:** I mean, yeah, I'm a big advocate of legacy programmes, and the stats that have come out this year have been really interesting, particularly from Legacy Foresight, talking about the impacts of the pandemic on legacies. And whilst initially, the forecast was dire, actually it saw a massive boom, at the back end of last year. A little bit, the income levels are down because house prices fell in a lot of areas so where people were inheriting property that was impacted. But actually, it's only marginally down, legacy giving. And remember, you know, when people start to think about their mortality, they start to think about things like legacy giving. So, actually legacies have been at the forefront of a lot of people's minds over the last year and we spoke about this, we did a webinar on legacies, I think it was you and I Chris, back in the spring\summer time. If your message is right and you deliver that effectively to your supporters, there's going to be no offence caused, you know, it's the same message. You know they're giving to secure your future or whatever the key message is for you. I would urge you to crack on and progress with it and we launched that programme.

**Andrew:** Can I suggest if that's your area of interest that you visit our website and check out those webinars, There's specifically one on legacies and relaunching and how to make the most of them, and you'll think you find that really helpful.

57:59

**Chris:** I think the theme here, throughout, is don't be scared. You know, we talked about the myths earlier on, you know, we've to degree over the last 12 months, as a nation, we've become quite immune to everything. We strengthened our resolve, we're looking forward to positive things and therefore let's not as fundraisers be scared of asking people for money, whether that's for legacies, whether we're having those conversations, those discussions around a capital project for the future, or

simply we need money to survive and get through this peak. We've seen how successful that's been, We've seen the power of emotion, we've seen the power, the speed of people's response in all sorts of fundraising ways and the real message here is, you know, now is the time as we emerge from all of this to look forward to great positivity, to the way that we're going to go forward and fundraise, and the opportunities will be there just as they were before, but we may just need to adapt a little bit to what it is we've been doing, just to make them a little bit more post-COVID friendly. That's the end the questions Amy, over to you.

**Amy:** Excellent, well, thank you very much, everybody. If you have a kind of more specific question and you want to follow up with any of us. There are our emails on the screen. Happy to have informal chat with anyone who wants to explore something further. Most of you may have it already but we do have our book gifted fundraising.

59:22

If you would like a complimentary copy, pops Julie an email, her email is on the screen, she'll pop that in the post for you.

59:30

Like I say this will be online in a couple of days-time, so if any colleagues have missed that you'll be able to find it on our website. Well, thank you ever so much for joining us once again. Hope you found it helpful, stay well everyone and hopefully we'll all be enjoying drinks in our garden soon with friends and family. Bye bye.