



Chartered
Institute of
Fundraising

think
CONSULTING SOLUTIONS

WHAT NEXT?

Fundraising and strategy after COVID



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FOREWORDS

Fundraisers have shown us once again just how resilient, adaptable, and innovative they are. The sector has embraced digital technologies to engage new audiences with exciting, pioneering products, whilst keeping loyal donors close through improved supporter experience. Every fundraiser has played their part in this: the Individual Giving teams who have expanded into new channels, the Event and Community teams who have quickly upskilled themselves to launch their first online event, and the Philanthropy teams who stepped up to develop new impact-driven partnerships, to name just three areas.

Now that in-person activities have restarted, the sector is adapting once again to bring donors together, whilst also keeping them safe. Over the past few months, it has been uplifting to hear that the public are pleased to see fundraisers back in action and recognise the vital role we play in supporting those most affected by COVID. None of this has been easy, but our learnings will shape and strengthen the sector. Although the future is still unclear, what is certain is that we have the tools and determination to succeed. Our next step must be towards a more inclusive sector that empowers donors to not simply give, but to use giving to generate greater social impact.



Dhivya O'Connor
Interim CEO
Chartered Institute of Fundraising

The last 18 months have been intense and challenging; but in many ways an exciting and dynamic period for the fundraising sector. The imperative of the early months of the pandemic saw many fundraising teams working at speed to implement new ways of working and introduce innovative ways of connecting and fundraising with supporters. The THINK team has been inspired by the sheer determination and dedication shown by fundraisers across the sector and we applaud the work undertaken to ensure funds raised are maximised so that programme delivery can continue.

However, the continued uncertainty of the pandemic has resulted in a prevalence of short term thinking and a stalling of longer term strategic plans. Now is the time to move beyond today and tomorrow and look ahead once more to what the next 3 – 5 years will look like for the fundraising in your charity. Whilst there are still many unknowns, focus needs to turn to the strategy and investment required over the long term to adopt new ways of working; and address those issues beyond the pandemic which are critical to success.

We hope you will find our reflections and ideas a stimulus to your thinking and action as you look ahead to 2022 and beyond.

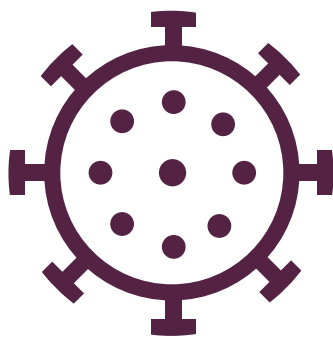


Michelle Chambers
Managing Director
THINK Consulting Solutions

STRATEGY AND PLANNING



A robust strategy and effective business and operational planning have always been the foundation for successful fundraising, but the global pandemic has brought about so much change over the last couple of years, current activity may look very different from what was planned and laid out in organisational strategies developed several years ago. Charities have rightly adapted, implementing new programmes, evolving existing ones and stopping some activity that just wasn't appropriate for the times we find ourselves in. However, decisions like these need to be made strategically. Tactical shifts may be appropriate for the short-term and may well lead to significant short-term gains, but there is a real risk of 'drift' and lack of focus if decisions are not made with longer-term strategy in mind. Ultimately, teams will not all be pulling in the same direction and may even be working in a way that actually derails each other's plans.



As we move into a post-COVID world (or perhaps more accurately as we learn to live with COVID), organisations will need to consider strategy and planning differently. There is likely to be continuing uncertainty. How quickly will the economy recover, and will it be 'even'? Will 'traditional' techniques and approaches return? How big will digital channels become and what new opportunities will emerge? While we can make educated guesses, nobody has a crystal ball so we just don't know. We simply have to be as prepared as we can be, keeping abreast of changes and adapting accordingly. But throughout, we need to keep long-term purpose and strategy at the heart of our thinking and keep planning based on sound insight and knowledge wherever we are in our cycle.



Key considerations



When you are thinking about strategy and planning – new or revised, there are a number of things to bear in mind. Three key elements come to the fore:

Know your history

In the words of the financial services industry, ‘past performance is no guarantee of future success’ but knowing about what has happened within your own organisation is critical. This seems obvious but it’s surprising how many organisations do not have a clear picture of past performance. We don’t just mean financial performance (income figures usually are available!) but numbers related to areas such as acquisition and retention, pipeline, response rates and average gift sizes. True cost is also key. In summary, how did things actually perform over the long-term and in the pandemic period? Interrogating data and understanding what actually happened is a really important starting point for future strategy and planning. Without this analysis, you risk continuing things that really aren’t working for you and not investing in those that will bring biggest returns.



Know the environment you are operating within

The UK fundraising market is mature and very competitive and understanding the world you are operating in is key. Do you actually know the size of the pie? Do you know the trends in various income streams? Do you know what competitors are doing and whether it’s working? Broadly, if you know a stream is in decline, you will know not to invest. If something is booming or another organisation has found a pot of gold, it’s perhaps sensible to investigate how it could work for you. You can learn a lot from researching the wider environment and doing it well and thoroughly really helps with your own planning and strategy development.



Know what you want to achieve



By definition, strategy is about determining direction and good planning helps get you there so it may be obvious to say know what you want to achieve, but there are some things to consider that are not always obvious or clear. What percentage of your income needs to be unrestricted to enable you to deliver your organisational goals? Is it just about money or is it more than that and if so, what does that look like? There are obviously a number of ways to deliver your organisation's core purpose and achieve overall goals, but different approaches have different implications. Your strategy should consider what is most important in terms of income types and with an understanding of supporter value – lifetime and non-financial.





When COVID struck, like for many, we had no idea if we would ride the storm. Being self-funded and relying on very little core funding, we hoped the communities that have supported us for so long would once again support our special cause.

Looking back, many funding sources dried up, so in this instance being reliant on the community paid off. The team adapted so well. I was and still am so proud of the way we worked independently from home. It brought us closer as a team and 18 months on we are stronger than ever.

Our fundraising events went online with numbers signing up in their hundreds. Being based in South Wales, many of our events are not always available for people across the whole of Wales, but the virtual work opened everything up to everyone and this allowed awareness to increase across the different areas.”

Rhian Mannings MBE
CEO and Founder
2 Wish upon a star – Wales

Assumptions

There are probably as many ways to write a strategy as there are charities and honestly, there isn't one single perfect way. You should develop a strategy that works for you, your teams and your stakeholders. Obviously – and perhaps most importantly – it should deliver for your beneficiaries, whoever they are. That said, all strategies have some key ingredients and are based on some basic assumptions:

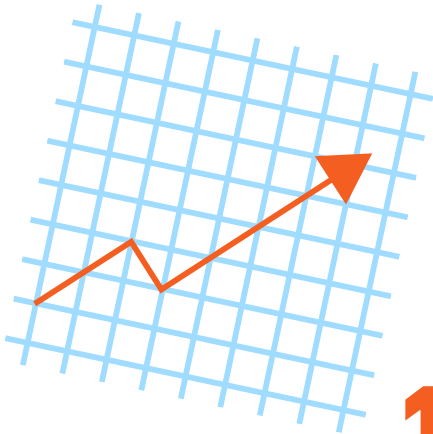
- **You will have clear goals** – what will you achieve by the end of the strategy period?
- **You will have clear objectives** – what will you do to achieve your goals?
- **You will support the strategy with robust operating plans** – How will you do it?
- **You will have targets and measures** – How will you know you have been successful?

To do all of this, it should be a given that:

- You will work collaboratively internally, providing everyone with an opportunity to contribute in some way.
- You will involve external stakeholders in a meaningful way, listen to what they say, and act on it.



Models to consider



As stated early, there is no one size fits all when it comes to strategy, but the pandemic has changed the way charities develop their strategy and plans, and the approach varies according to where charities are in their cycle – coming to an end of an existing strategy period and developing a new one, or part way through an existing strategy. For those part way through an existing strategy, the approach appears very much one of continuation with review – in other words, broadly continuing with the agreed overall strategy, but revisiting annual plans to make sure they are fit for purpose and adjusting targets and KPIs accordingly. This should obviously be done in consultation to ensure everyone understands the drivers for change.

For those who are developing new strategies, there are a few models to consider:

1

The ‘classic’ 3-5 year strategy approach – This approach has served organisations well for years and still can do but it is important to recognise that 5 years seems a distant horizon at the moment and degrees of certainty will decrease in later years. Having a robust strategy for the first three years and wiggle room for the latter two is probably the best approach at this point.

2

Long-term vision broken into shorter periods – The impact of the pandemic has made some charities really think about and question their long-term goals. What does real transformation look like and how can we really change the world for those we support? This is not about incremental change but truly big picture thinking that can shift what organisations do and how they achieve it. This does not happen overnight and 10-year horizons are needed here. Clearly, certainty decreases into the future, so charities taking this approach are looking to break 10-year horizons into shorter chunks (e.g. 3-year operating plans), reviewing and adapting as the picture becomes clearer along the journey.



3

1-year plan for now – There has been so much change over the last 12–18 months and uncertainty remains. It may not be the time for some organisations to develop full strategies at the moment. Some charities may therefore decide to develop a simple (although still robust) 1-year plan while they take time to reflect and review more fully. This thinking and analysis will then feed into a longer-term strategy based on real insight and knowledge of what happened in pre-COVID **and** COVID years.

Questions

- With the backdrop of a changing landscape over the last couple of years, how are you evaluating your performance and how are you gathering sector intelligence?
- If you are part-way through an existing strategy, what changes do you need to make to ensure you remain on-track? Do goals, objectives and practical plans need to change and how do you ensure everyone stays on board?
- If you are coming to the end of a strategic period, what approach are you going to take with future strategy and planning? Would a 10-year horizon work for you or do you want to take time to think and develop a 1-year plan for now?
- How are you making sure everyone from trustees and supporters to beneficiaries are involved in thinking and planning in a meaningful way?



Simon Dickson

Senior Consultant and Head of Intelligence
THINK Consulting Solutions

INVESTING IN FUNDRAISING

2



Many of the 'investment' decisions which have been made over the last 15 months have been focused on immediate income generation and fundraising initiatives to mitigate income loss over the pandemic. As it becomes clear that both our professional and personal lives will continue against a backdrop of ongoing uncertainty, it is now vital to shift that thinking, and approach investment decision making on a dual and parallel track. A track where considerations of all types of investments are thought through, from generating in-year returns, such as those we've seen in Facebook fundraising and challenges, to those which will yield a longer-term return over a three, five and ten-year planning vista. This second investment approach will include areas such as strengthening digital capacity through building infrastructure and requirements of data analytics to support all income generation through to streams such as legacy, major donor programmes and the more 'traditional' individual giving programmes focused on delivering lifetime value.

For some organisations, it will be a case of returning to long-term investment plans developed pre-March 2020, reviewing what has changed to impact these plans and what can be reignited. For others, it will be a case of starting with a blank sheet of paper to draw up investment priorities which underpin a newly defined fundraising strategy. Wherever you are on this spectrum, consider the following key areas:



Our first challenge was to speedily adjust our fundraising plans to maintain steady income in the most difficult imaginable circumstances. We had already embraced digital fundraising – especially Facebook – so were well placed. We had no choice but to press ‘fast forward’ and, thankfully, that ‘full steam ahead’ approach has yielded really good results.

Our challenge now is to find the right blend between traditional fundraising and further digital innovation. We want to be ambitious in planning what we are going to keep doing and courageous in deciding what to leave behind. Proper research, matched with bold thinking, will deliver the positive outcomes we need.”

Ronan McCay

Head of Fundraising
& Communications
Children in Crossfire –
Northern Ireland

Future shape of fundraising model and portfolio

The first consideration is what you need your fundraising model and portfolio to look like in three to five years’ time. Those charities whose portfolios were diversified and adaptable pre-pandemic had a greater chance of sustaining income levels, so this should be key to investment planning. Taking a long, hard look at where you were pre pandemic, what has worked well over the last 15 months and needs to be retained and what might have been more short-lived and so should not be pushed hard, should form the starting point of your investment planning. The long-lasting legacy of the pandemic for fundraising terms lies in the need to:

- Properly integrate the use of digital techniques and channels into all areas of fundraising – so taking a hybrid approach which is data driven to determine if existing supporters are switching between channels, and the extent to which new audiences are being attracted by different channels.
- Understand the true metrics of performance and ensuring any outliers of significant success are isolated.
- Demonstrate impact – both immediately and over the longer term.
- Understand what is important to fundraising audiences and how they want to partner with you to make a difference.
- Keep donor retention and development as the primary focus of your fundraising, followed closely by acquisition of both similar and new audience donors.
- Adapt at speed to the opportunities afforded by emerging ways of raising income – whether that be a new funding stream, a new digital trend, a new way of working with an audience.





Use these considerations to sketch out the ideal state of your portfolio at the end of a given time period. This ideal state should include both the mix of actual fundraising streams, the level of each stream's contribution and the skills and capabilities needed by your team and organisation to deliver them. With this completed, move on to look at where you are now and what needs to change to get you to where you want to be. From this will fall your investment requirements which can be grouped into the following approaches:

- 1. Investment to introduce new activity.**
- 2. Investment to grow/sustain existing activity.**
- 3. Investment in building capability and skills.**
- 4. Investment in infrastructure and technology to optimise efficiency, support growth and enable connections between staff and with supporters.**





Despite unprecedented pressure, Scottish charities have risen to the challenge and become central to recovery. The Scottish Government moved swiftly to provide extra support for charities during the pandemic, but that is likely to be targeted and time-limited.

Our fundraising community in Scotland have done amazing work over the last year or so, and we must now take that forward to raise the role and potential of giving, and forge a strong relationship with one of the most diverse parliaments in Holyrood's history, understanding the political agenda focused on recovery, unemployment and health.

Coming out of a period of uncertainty means that we are looking hard at how we are fit for the future, looking at our operating models, and thinking about how our fundraising will develop over the coming years. Many will also have one eye on the potential impact or opportunity of a possible independence referendum, which I would encourage charities to start thinking about now."

Virginia Anderson

CEO, Disability
Snowsport UK and Chair,
Chartered Institute of
Fundraising Scotland

Determine priorities

Many organisations are finding it difficult to consider, let alone agree, long term investment, as a result of the ongoing challenges presented by the pandemic. What has always been certain is even sustaining income requires some level of investment. Growing income is impossible without it and cutting investment in fundraising development rather than making efficiency savings, will slow and likely reverse growth. What you need to make clear to senior leaders assessing your investment bid is the timing of investment made versus results delivered, in order to demonstrate that delays impact speed of return.

Using the groupings of investment approaches described previously helps to guide priorities. Each takes a different investment approach, with some seeking net income in year and year-on-year and others being about future sustainability. Investment approach one requires agreements to have a 'test and learn' investment envelope which is agreed as a 'lump sum' at the start of the financial year on the basis of introducing X new activities, but with funds only released in a phased approach, once agreed performance metrics have been achieved, and only in progressing phases (first, second, third etc.) once results of the previous one are known and only progressing to new activity trials once the potential – or not – of those already in play are known. Whilst this may slow progress, it serves to mitigate concerns regarding committing to too much investment from day one. With this type of investment, agreement should be sought to roll any financial over performance which delivers actual net income during the trial period back into the investment envelope and to potentially accelerate implementation of trials.



Investment approach two leans into both retention and acquisition and considerations of developing lifetime value and replenishing/growing donor numbers. A baseline investment into ongoing stewardship should be prioritised, which should include activity to 'replenish' income loss predicted from donors attriting and activities to reduce attrition as much as possible. The next priority is investment into tried and tested acquisition methodologies, followed by trialling new techniques. For all of these investments, modelling financial performance over the long term is critical in both determining the priority and demonstrating the impact of both investing and not investing.

Investment approaches three and four require ongoing investment against known, defined projects over the entire strategic period. The discussion here should centre on the long-term outputs and impact, and how investment to deliver these can be phased. There is a tendency to seek all the investment needed in one go, however there is a higher chance of success if a plan can be developed to show what needs to happen in what year and what the associated cost is. This type of investment should include time as well as money, for example, some skill development might be team members formally training the wider team, where the investment is one of time, or a team member leading on the assessment of a new piece of infrastructure as a development opportunity.

Approaching and evidencing priorities as described should help to allay fears around over committing to investment – laying out a multi-year scenario will enable decision makers to see what the potential prize is, as well as the consequences of delaying/deferring investment.





In Wales, like the rest of the UK, charities have been massively affected by the pandemic, and effects will continue to be felt for years to come. Wales has many small and medium charities that are dependent on volunteers, and many have struggled to adapt to the dramatically changing landscape and restrictions of the pandemic.

However, with a new government that is supportive of the sector, there is also opportunity for charities and fundraisers alike. Even though financial support can still be difficult to secure, there is new agency within government that knows that many communities depend on the work and services charities deliver to survive.

With potential new funding streams on the horizon, and a new government keen to ensure progress is made towards our well-being goals, there is hope that charities will continue to thrive and grow in delivering incredible impact.”

Owen Thomas

Fundraising and Development,
National Botanic Garden of Wales (Gardd Fotaneg Genedlaethol Cymru) and Chair, Chartered Institute of Fundraising Wales, (Sefydliad Siartredig Codi Arian Cymru)

Evidence a staged approach

A key part of making the argument for investment is identifying and setting the right measurement of performance and determining what should be regarded as success versus failure. These will of course vary depending on the stage of the investment cycle into a particular activity. Return on investment will always be keenly watched and so it is critical to think about and explain what an acceptable ROI looks like at different stages of development for both individual products and overall streams. A balanced scorecard approach to setting KPIs – which considers financial, customer, internal process and learning/growth – could be utilised as this enables non-financial measures to be combined with financial to assess the impact of investment. Often an ROI is inextricably linked to your fundraising performance, but your fundraising activities may be achieving some of your organisational mission – particularly for advocacy and engagement organisations. Be explicit in the significant added value of your activity, work with cross-functional areas to agree these and have in place the ability to deliver the required analytics, through data capture and analysis. This is crucial – and might be the first initiative which requires investment, with a case that evidences the downstream benefit of this.

Another key element of setting and evidencing a case for investment is demonstrating an appropriate consideration of risk and mitigation. One such risk might be the addition of recurrent headcount, which may prove superfluous over the medium to long-term. Consider the use of alternative resourcing, such as fixed term contracts or use of interims to provide proof of concept in a new income generating activity or to provide a short-term injection of skills.



Questions

- What has your investment been, in time and money, over the pandemic? Are you confident your data is robust enough to support any future performance modelling?
- Have you had exceptional, first time activities that have outperformed all expectations? What will an 'unlocked' landscape do to those activities?
- What information and data do you need to determine the shape of your future fundraising portfolio?
- Do you already know how much it costs you to keep your most valuable supporters engaged and giving? Are you aware of costs sitting outside of your envelopes that are vital to this engagement – IT, CRM etc.?
- Have you got the necessary tools or people to support your investment approach and modelling?
- What information and in what level of detail will decision makers need to see in connection with your investment requests?



Jindy Pal

Senior Consultant
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Michelle Chambers

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The Chief Executive's role in fundraising

Fundraising generates income that's vital to the delivery of our charitable missions. In many cases, the difference a charity can make in the world is dependent on the money it raises, and the amount of money it can raise is dependent on the organisation having a supportive and enabling environment for fundraising to thrive.



A lot of brilliant fundraising happens thanks to the great leadership of Chief Executives – and quite a bit of it happens in spite of it. Fundamentally, the CEO's role is to create a culture where fundraising can flourish.

Getting this right can be tricky. New challenges demand new approaches; people move on and relationships have to be nurtured and developed; tough decisions on setting realistic expectations for achieving income generation each year – and the amount of money to invest in achieving it – have to be made. Boards need to agree the right balance between short term tactics to bring in funds and the longer-term strategy behind those tactics, between the need to attract new donors and the stewardship of existing supporters.

Right now, this might all be more challenging than it is in a 'normal' year (whatever that is!). The full impact of what COVID means for our charity sector and the work we do is yet to be seen. Many organisations are working with a mix of reduced staff numbers, a smaller budget, and an increased demand for services. Many conversations and discussions are taking place within charities about how much the pandemic has fundamentally changed what we do and how we do it.

While no-one would have wished for the circumstances that brought these discussions into being, the fact they are happening in virtual board rooms across the UK is no bad thing. Fundraising needs to be a core part of wider crisis recovery plans. Reviewing an organisation's operating model, its strategy, its culture and working practices, how it funds its mission, and thinking differently and creatively about how we can have the most positive impact for people and causes, are real positives.



As fundraising and communication teams adapt to new ways of working, not just the ways the charity works with beneficiaries but as important, how teams work together effectively, supporting our people is going to be a key element of how successful we are raising money going forward.

Providing support to individuals through coaching, mentoring and personal learning opportunities, as well as investing in bringing teams together is going to play a key role in balancing the stress, disconnection and uncertainty of the last year. Investing in our people is just as important as spending money on fundraising, together they will effect real long lasting change.

Sarah Tite

Director Fundraising and Communication
Mental Health Foundation

As these discussions take place, I see it as part of every CEO's responsibility to make sure that fundraising is viewed as a strategic function, as joined up with the whole organisation as every other team. When we think about 'What's next' it's really important for fundraising to be fully around the table and thought of as a central part of how the organisation achieves impact. And to do that, CEOs need to listen carefully to fundraisers' expertise, ideas and honesty to help shape and inform decisions. It's a time for open conversations, constructive challenge, and mutual support for colleagues across all teams and all levels within each charity.

What that looks like for each individual organisation will of course be different, but if we start with these key principles in mind then we'll be heading in the right direction for success.



Vicky Browning

CEO

Association of Chief Executives of Voluntary Organisations

ADAPTING TO NEW WAYS OF WORKING

3

As the UK enters the Autumn months after the majority of restrictions have been lifted over the summer, the country is now entering a new phase of the coronavirus pandemic. How, where and when we work has been disrupted for over eighteen months and a host of business experts believe that many of these changes will be permanent shifts to how we work.

In summarising these shifts, three key elements come to the fore:

- 1. Increased flexibility**
- 2. Fit-for-purpose technology**
- 3. Getting better at asynchronous working**

Flexibility

90%

OF RESPONDENTS WANTED FLEXIBLE WORKING TO CONTINUE AFTER THE PANDEMIC

The first place for any organisation to start is its approach to flexibility. Employees now expect much more flexibility in how, where and when they work. A study conducted by The Resource Alliance and Blackbaud found that 90% of respondents wanted flexible working to continue after the pandemic.¹ This report, which was based on a survey of 800 fundraisers and interviews with eight charity leaders, puts into stark relief how quickly change has happened.

Charities, like all businesses, now need to ensure they offer a true hybrid approach to work; a blend of working from home balanced with less frequent days in an office or shared working space. Companies including Twitter, Facebook, Shopify and Siemens have all announced that they will make their versions of remote working permanent even after the pandemic has ended.

1 The study can be viewed at: <https://www.blackbaud.co.uk/industry-insights/resources/the-future-of-work-2021>



I am concerned about the more junior fundraisers and the learning they would have got through osmosis in an office environment. I fear that by being remote for so long and moving now to a hybrid model, that this may cause issues in future.

As senior leaders we have to find new ways of coaching and developing our teams. How we evaluate performance remotely is completely different for organisations that didn't previously have a remote workforce like us.

On the other hand, the opportunity to move to a hybrid model is hugely exciting and a complete transformational shift which will benefit everyone in a so many ways. I think people have felt more empowered and in control of their work as a result of having to work remotely. As we shift to a different working pattern the hope is that this will continue to be a big motivator."

Susan Booth

Executive Director,
Development
Target Ovarian Cancer

This view is supported by a study from Charity Job that found the percentage of jobs advertised as fully home-based has increased from 4% in March 2020 to 24% at the end of 2020. Additionally, the Blackbaud study saw 43% of fundraisers stating that they would never apply for a job entirely based in the office.

This will now become a deal-breaker for many job applicants. Flexibility is a clear signifier of an organisation's internal culture and how leaders bring those values to life. Charities that offer flexibility in location and working approach will have a much larger pool of job applicants to recruit from and are also likely to be seen as more progressive when it comes to other issues. Flexible working is now not just about measuring efficiency and the resulting outputs but speaks to the wider issues of equality and diversity.

Ultimately, flexibility will be needed on both sides as many roles, at least for the time being, will still need to be based in the office (such as Supporter Services) and key outputs such as training, workshops and specific meetings will be more effective if delivered face-to-face. Organisations will need to agree specific parameters with their staff ahead of time (e.g. one day in the office per month) so expectations are set early and fairly.

The move to more remote working has dramatically increased opportunities for people with disabilities and those with parental and carer responsibilities. Before the pandemic these groups had often been denied the flexibility they needed and therefore were often excluded from particular roles and working for certain organisations. An August 2020 study by UNISON found that nearly three quarters (73%) of disabled staff felt they were more productive or as productive working from home compared to their pre-lockdown place of work. More than half (54%) felt they would benefit from working from home in the future, but nearly two in five (37%) believed their employer was unlikely to allow this.

43%

**OF FUNDRAISERS STATED THEY
WOULD NEVER APPLY FOR A JOB
ENTIRELY BASED IN THE OFFICE**



As we move out of this period of COVID we must continue to focus on our loyal and existing supporters, and invest time in strengthening those relationships, retaining our focus on increasing lifetime value. A more personal approach has paid dividends and the move away from using remote communications as a default is a learning that we need to take forward if we are to maintain the success we have seen in the last year. This is a new way of working for many, but plays to the heart of traditional fundraising, which is all about relationships and supporting those who want to support your work.”

Tracey Hancock

Director of Fundraising
Rennie Grove
Hospice Care

As the last eighteen months have proven, a mixed model of working offers significant benefits to both charities and their staff. Organisations will be able to reduce their property and running costs, recruit from a wider pool of candidates, and enjoy increased productivity. Employees will benefit from being able to work from more locations, reduce the number of stressful and expensive commutes and enjoy a better work/life balance.

On the flip side, more working from home has likely impacted our creativity and problem-solving capability – particularly when looking to solve challenges as a team. It also can make learning by osmosis, particularly for new starters or those in first or second jobs, very difficult. The drop in face-to-face, in-person interaction and socialising will impact how connected to an organisation an employee feels and will likely increase staff turnover. This is also likely to lead to an increase in fixed term contracts, interim assignments and job-sharing opportunities as organisations adapt to their changing staffing needs. To mitigate against this, it will be increasingly important to schedule in regular face-to-face interactions to help re-balance the drive towards more home working.

The changes to how we work have clearly also impacted how we monitor and protect staff health and well-being. 79% of respondents to the Blackbaud survey said that they were worried about the effect of the crisis on their mental health. With 48% saying that their overall well-being has declined during the pandemic.



79%

OF RESPONDENTS TO THE BLACKBAUD SURVEY SAID THEY WERE WORRIED ABOUT THE EFFECT OF THE CRISIS ON THEIR MENTAL HEALTH

Technology

An increase in remote working will also impact how teams learn and share information and expertise. As stated previously, this will have a bigger impact on colleagues earlier in their career who may now miss out on learning and development opportunities they would have received in an office-based environment. Organisations will now need to develop new ways of coaching and training their teams to ensure a post-COVID skills gap does not emerge. The sector will need to establish formal coaching and mentoring programmes to replace the interactions younger staff would have received in-person. It is important for managers to ensure that joint working isn't just screen based and that regular face-to-face workshops are also included in a team's planning cycle.

Unsurprisingly, ensuring staff have fit-for-purpose software and hardware is now more important than ever. Organisations that limit or cutback investment in IT and infrastructure will likely regret this short-term penny pinching down-the-road. With the pace of change at an all-time high, ensuring employees have the latest software and hardware is now absolutely critical to doing our jobs.

Again, the Blackbaud study found that nearly a quarter of those who wanted to return to the office said that the reason was insufficient access to software. 87% of fundraisers said that technology had been a key factor in being able to work effectively from home.



Asynchronous working



As with other industries, it can be said that many charities meet too frequently. Many pointless in-person meetings have just been replaced with pointless video meetings. To solve this, charities need to get more comfortable with and be better at asynchronous working.² This can be achieved through more efficient use of Teams, Trello boards, Slack or Yammer channels, video messaging, internal intranets and better use of shared documents.

Ultimately, flexible working policies and cutting-edge technology will only go so far, if the surrounding processes and how we communicate don't change with them.

The major positives to asynchronous working are that it leads to fewer interruptions and allows staff to prioritise key tasks and tackle detailed work. This allows colleagues to respond and contribute to work-in-progress without disrupting the flow of their day and helps reduce the number of meetings to just the essential. It helps to remove the pressure of immediate response, but this needs to be adopted fully to effectively work.

The power of asynchronous communication lies in it encouraging proactive rather than reactive work allowing more time to digest and consider responses rather than rushing responses to appear efficient. When staff are not tied to meeting structures to deliver all of their outputs they plan and work through actions more efficiently and effectively.

Asynchronous working also plays to a varied team's strengths enabling individuals to work at their own prime time. Some are efficient at 5am, others later in the evening. By adopting a flexible culture, productivity and work quality increases.

Organisations and managers now need to trust their teams more than ever. Gone are the days of clocking in at 9am and leaving the office at 5pm. For asynchronous work to be truly successful, teams need to have a shared understanding built on trust, flexibility and a well-defined process.

² Asynchronous work is work that doesn't happen at the same time for everyone. Asynchronous communication can be an asset for remote teams for many reasons, but especially if you have staff across multiple time zones. Businesses now need to make sure that no one is excluded from important discussions and collaboration because of where they live and the hours/days they work. (Buffer blog, March 2020)



Questions

- With dramatic changes to working patterns expected to continue for the long-term, how are you monitoring and protecting your staff's mental well-being?
- How regularly is your organisation planning on investing in the right software and hardware to make flexible working a success? Do you have a technology roadmap for the next five years?
- What is your organisation's approach to asynchronous work? Are you too reliant on meetings and email to accomplish your goals?
- How will you ensure that you continue to develop your team and keep them engaged with the new look working environment?



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EQUALITY, DIVERSITY AND INCLUSION

4

We've made the first steps on a long journey

For much of 2020, we were talking about the death of George Floyd. At the time, not all organisations felt it necessary to speak about the issue let alone reflect on the impact it might have had on their staff and particularly staff of colour. But the outpouring that followed this awful killing seemed to signal a shift in society and in turn our sector.

A year on, and nearly all organisations, charities included, issued messages on the anniversary of George Floyd's death both internally and externally.

Many see this as an indicator as to how much has changed over the last year. There has been a feeling that society has woken up to the disparities that exist in society and in our organisations, and that no longer will we stand by and allow the lack of diversity and inclusion to go unnoticed or overlooked.

But it's sometimes hard to feel that progress is being made when there are still societal indicators that point to ongoing issues. Assaults and deaths of people, sometimes quite young people, being linked to racism and transphobia; women not being properly protected from mental and physical attack; footballers being racially abused for missing penalties; and a race report that concluded that there is no systemic racism in this country.

However, there has been lots of change, particularly in our sector. Charities have proudly talked about the anti-racist training they are doing; the work being done to explore power and privilege; the research to identify whether we are achieving diversity in our services and our workplaces; and the review of our recruitment practices to ensure no biases are being applied. This all feels like progress.



We saw the first BAME Fundraising Conference in 2020 which has been repeated this year. Moreover, other conferences are much more aware of having speaker panels that reflect diversity. The challenge that faces us now is how do we harness these good actions to bring about actual change?

Rethinking workplace diversity has been top of mind for many charities. With more and more organisations embarking on diversity programmes, it is essential to understand what that truly means. It has to be more than a numbers game or having some visual indicators. Indeed, we will need to identify clear goals, outcomes, competencies and measures. Cultural intelligence will be needed to ensure that we are creating environments where people from different backgrounds will identify with us enough to want to join our organisations. And that we are able to acknowledge the influence of different cultures on value and behaviours.

Tackling diversity and inclusion with those connected to but outside of our organisations will continue to take courage. In fundraising we have an army of constituents: donors, supporters, DIY fundraisers, volunteers, advisers and influencers. We must be careful to not compromise our commitment to diversity and inclusion to satisfy supporters. Allyship will be increasingly important and should be encouraged across our organisations. We must all actively champion people different from ourselves as this is what leads to productive conversations about differences.

It is important that the sector recognises the progress it has made thus far but does not see this as 'job done'. Lifetimes of systemic bias will not be undone overnight but small and continuous changes will make a difference. An ongoing commitment to inclusion will be needed until workplace diversity has been normalised.



Lisa Russel

Associate Partner Consultant
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Where to next?

We have experienced more change in the last tumultuous year than most of us can ever recall, what has made this even more intense is that it was a collective and universal experience. Within these moments whether social or professional the nature and content of discussions regarding equality, diversity and inclusion have also shifted.



So where do we go next? The Chartered Institute of Fundraising wants to work and collaborate with everyone who is passionate about our sector, whether they are from the wider charity community, already within our membership and networks or not affiliated to us in anyway. Different approaches, perspectives, experiences and skills all have to be combined and we believe that we are well placed to amplify the desire for measured and meaningful change in this area.



As a sector we are rightly proud of our campaigning credentials and heritage, we must therefore acknowledge the ongoing work of #CharitySoWhite in making the sector recognise the lack of diversity and inclusion within organisations. This, coupled with the success and feedback from the BAME Online Conference, hosted by Fundraising Everywhere curated, presented and delivered by Martha Awojobi and Camille St-Omer Donaldson, highlights why listening and learning from Black Fundraisers, Asian Fundraisers and Fundraisers from all minority groups in the charity sector must be a priority.

Change also brings big questions. What are the opportunities for our organisations to consider EDI when it comes to future support? We know the impact of COVID-19 has had a disproportionate impact on marginalised communities – so how do we move towards addressing those challenges with regards to funding, services and provision? As a sector we need to be more attuned to the needs of different audiences, how can we be relevant to younger more socially conscious and demanding individuals? How do we sustain the positive change regarding accessibility and engagement achieved through online platforms and remote working for those who with a disability, vulnerable or with caring responsibilities? We need to come together, share knowledge and best practice to accelerate, prioritise and normalise progress in these areas.



We believe this change has to be supported from the inside out, so collectively we need to be more conscious around governance and ownership of EDI at leadership level and consideration of the impact of strategic decisions that we make around thematic work streams. How we recruit, develop and retain new individuals is key, our recruitment guides developed for the sector are an incredible useful resource. Culturally how we proactively build inclusive environments with well-being and work-life balance at the centre of hybrid working patterns is a priority for the sector. Intersectionality must remain front of mind, wherever possible so we address the commonalities that occur across multiple protected characteristics and create environments that are equitable addressing the needs of all.

So there is much to do, but it is not the role of those in the minority to be tasked with making this change happen alone. The task is to change attitudes and behaviours of those in the majority; by reaching the gatekeepers with both the influence and networks who can be catalysts for change. These individuals need to be pro-active, recognising the lack of diversity in the areas they occupy, and bringing individuals from under-represented groups into areas where they currently have limited or no visibility and most importantly also empowering them.

The past year has demonstrated how adaptable we are, how quickly we can be shifted out of our comfort zone and not just survive but thrive. Change comes from collective action so let's continue to drive change.



David Mbaziira

Head of EDI

Chartered Institute of Fundraising

FUNDRAISING AFTER COVID

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Planning for the future in fundraising is never easy. At any particular moment in time there are uncertainties that impact fundraising activity, whether it's an upcoming election, changes to economic forecasts, technological developments, or shifts in public attitudes and consumer behaviour. Before COVID, we were already in a period of uncertainty, the Office of Budget Responsibility (OBR) was warning of a full-blown recession should we leave the EU without a deal. Now we have left with a deal, lockdown has meant we are yet to completely understand the full impact of post-Brexit arrangements on donors.

Discussions around 'the future' were hard to answer back in the early months of 2020 – and even more so now as we enter the winter of 2021. What will the long-term economic impact be – an immediate bounce back or a slow and prolonged slump? Are social issues and renewed awareness of the work of charities here to stay, or were they inextricably linked to experiencing a pandemic? How, and how much, will people continue to give? It may be a cliché to say we have many more questions than answers right now, but that doesn't make it any less true. And as each organisation grapples with what it means for them and their future plans, it's worth thinking through some of the wider issues and themes out there which may well have an impact on how you approach the coming months.



Brexit and the economy



The pandemic has been all-consuming, everything we look at right now is being seen through the lens of COVID. That means that the impact of and changes following Brexit have been somewhat masked or deferred. The biggest impact of Brexit on fundraising was always going to be the economic consequences it would bring: would people have more or less disposable income to donate to charity, would there be a rise in unemployment, would pension pots and house-prices be affected, would grant funders and businesses have less available money to fund or donate to charities? It will, for the current time at least, be impossible to untangle the impact of Brexit and the impact of the pandemic, but for fundraising purposes it's a bit of a moot point – the key question is and will be how well the economy performs over the coming months and years.

The future of the economy is widely uncertain. Although the OBR is cautiously optimistic that the rapid vaccine rollout will help the economy and unemployment rebound swiftly, its unclear how this will impact donor behaviour. The pandemic's impact has not been felt equally, meaning whilst some donors might be ready to give, others will be tightening their belts. So you must take this time now to consider where you donors sit on this spectrum – how have job losses affected them, how can you give them a great supporter experience, and how can you remain agile as the situation unfolds?

Charities that have previously relied on EU structural funds will need to see how, where, and if they can access replacement funding. Time will tell if in the short term, the UK Community Renewal Fund will help charities navigate this period of transition, and if in the long term, the UK Shared Prosperity Fund will be an adequate substitute. If you are a charity who has previously received EU funding, you should look at how you will work with these funds, if there is potential to take part in any of their pilot projects, and whether you need start to diversify into new income streams.

A fundraising profession fit for the future

The fundraising profession never stands still. Continual evolution, progression, and development is part of a fundraiser's DNA. Alongside individual professional development we also need to recognise and support change across the fundraising community and wider sector. As part of your look to the future, an area that should always be considered is how you and your fundraisers will change and develop too, whether that's reflecting on your progression and steps to be more equal, diverse, and inclusive, or in investing in your fundraising capacity and skills development.

At the Chartered Institute, receiving our Royal Charter last year was a crucial step in the wider recognition of fundraising as a profession. Alongside the launch of our new Competency Framework, which aims to help fundraisers understand and progress the behaviours and values that underpin excellent fundraising. It's worth taking the time to think about how the key behaviours – inclusive, resilient, empathetic, ethical and innovative – can be embedded into your fundraising.



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The focus that will bring us the greatest return is how we can best answer our audiences short, medium and long term needs through our portfolio, channels and services. Then we need to determine how we can align the charity’s common goals and priorities, so we can leverage the strength of the entire organisation to achieve that growth.”

Clare Moore

Director of Fundraising
Products & Portfolio
Strategy
Cancer Research UK

Trust and impact go hand in hand and charities who can show meaningful impact throughout their supporter journey will build relationships with donors that can weather any storm. This is where innovation can make you stand out from the crowd and you should look at finding new ways to show your donors their support is making a meaningful difference. Innovation is perhaps one of the few positives we can take from the pandemic. Fundraisers became agile and innovative, embracing digital technologies to develop new ways of working and fundraising products. As we move forward, donors are going to continue to expect new opportunities to engage with charities both in the digitally and in-person.

The road ahead has many questions, the answers to which will be unique, depending on your donors, fundraising capacity, and organisation’s culture. While you can’t predict the future, having a plan centred on building trust with supporters and being agile in the face of change will see you through the next phase of uncertainty.



Charlotte Sherman

Policy and Information Officer
Chartered Institute of Fundraising





In an unpredictable world, having clarity of purpose helps keep the team on track and makes checking progress easier down the line. As fundraisers, our approach is to plan for and manage those elements that we can positively influence whilst learning quickly from those around us. We understand that the mix of how and what people respond to is different. We also know that our cause appeals and the public will respond if asked. We aim to work safely, positively and recognising valid concerns that influence our supporters' decisions and their willingness to engage and give."

Paul Morgan

Director of Fundraising
and Communication
Naomi House
& Jackspace



Questions to consider

- 1 How will the consequences of Brexit impact your organisation and your supporters?
- 2 What is the public policy agenda for the area your organisation works in? How might that relate to your supporters and fundraising activities?
- 3 How is the economic forecast likely to impact your supporters and their ability to give?
- 4 How will the continuing impact of COVID-19 affect your organisation, your supporters, and your fundraising?
- 5 How would you prepare if there was a return to lockdown restrictions or a new wave of infections over winter?
- 6 How would your organisation respond to potential use of vaccine passports for your fundraising events or work with third parties?
- 7 What has your organisation learned through COVID-19 about how you work, your culture, and your responsiveness to change?
- 8 What is the changing expectation of supporters to online, digital, or virtual events and new ways of fundraising?
- 9 How is your supporter experience responding to continue to meet the public's expectations and preferences?
- 10 How will your fundraising teams be working in the future – remote/home working, hybrid models, continued flexibility, return to offices?

Together we are the future of fundraising

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

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About THINK Consulting Solutions

THINK Consulting Solutions has been working with charities and not for profits in the UK and across the world for almost twenty years. THINK offers a unique portfolio of services – consultancy, research and insight, interim management and specialist forums – all tailored to meet the distinctive requirements of each client.

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