

<Toolkit>

5 fundraising lessons that could help 99% of charities



This toolkit provides 5 valuable lessons for fundraising that could be critical for the 99% of UK charities with an annual income of £5 million or less. The lessons include how to start an Individual Giving programme, how to raise funds for difficult causes and how to get the basics right. These insights could help you recruit more supporters and maximise their value for the long term.

Introduction

If you were to attend a fundraising conference or read a fundraising blog in the UK you might be under the impression that most charities are undertaking massive, integrated fundraising campaigns using the latest sophisticated techniques. But this is not the reality for most charities.

95% of charities in England and Wales have an income of less than £500,000 per year. Only 1% have an income above £5 million. So, there are a few large organisations with big budgets and big teams that are able to try big, groundbreaking campaigns but most charities and not-for-profit organisations are small or medium sized and have limited resources so **their priority has to be to do the basics well** - and focus on getting the **best long-term income possible within their limited resources**. This paper will explore how to do this.

We will explore 5 key lessons from ChangeStar's decades of experience and success in working with UK charities.

Contents

Section	Page
1. How to start an Individual Giving (IG) programme	3
2. Do a touch point review	6
3. How to raise funds for difficult causes	9
4. When recruitment is working, spend more on it	14
5. Get the basics right	17

Lesson 1 - How to start an Individual Giving (IG) programme

We talk to a lot of non-profit organisations who want to start up an individual giving programme because they need to diversify their fundraising channels or build a more stable income base.

Some of the questions that come up a lot are: how to start up a programme like this, how much it will cost and how long it will take to reach profitability, and we find a lot of organisations have inaccurate expectations of what's possible and don't take the steps needed to start off in the right way. This can lead to the programmes failing after a while or not achieving what they could. So, the first lesson from is what to think about and do when you're looking to set up an IG programme.

Here are some of the key initial things you need to do:

- **Clarify your aims** – you need to have an idea of what you want to achieve with your IG programme and how much you have available to spend on it. You may have a certain amount of budget available and want to build a programme as best you can over time within that. Or you may have ambitions to reach a certain level of annual income or number of supporters, and are willing to invest whatever resources are needed to get there. It's important to be clear about these aims from the start. These might not come from you though – and that is why the next point is so important...
- **Set realistic expectations within your organisation** – professional fundraisers know it takes time and money to build IG programmes, but often the people who are making the decisions about budgets and activities – senior management and trustees – don't. So, your first step needs to be helping senior management in your organisation understand how IG works, what a programme involves and what it costs, and what income is possible to generate from it. This stuff may seem obvious to you but it's not to others and it's your job to educate them. We have seen lots of charities get into problems when they fail to do this. Just take resources as an example:

- People often **underestimate the amount of investment** that is needed to run an effective IG programme. Even if you are only recruiting a few hundred supporters a year, you still need a full programme of development activities like cash appeals, regular giving appeals and legacy appeals in order to generate money from these supporters. You need budget to pay for these activities as well as the staff to manage them.
- People also need to understand that **it's a long-term commitment** – an ongoing process of increasing investment every year, not a quick way of raising funds in the short term - so your senior team need to be in it for the long run, in both their commitment to it and their willingness to invest budget over the long term.

To help you set these expectations (and your aims) **we suggest developing a rough plan and budget for the IG programme** early on just to illustrate how much money is needed to run the activities needed each year (and this will need to increase each year), as well as the likely income each year that will be raised by it – including the ongoing impact that regular gifts are making. You can produce different scenarios for different levels of budget. This should make it really clear that ongoing investment is needed and that the programme may not even make a profit initially, but that after 2 or 3 years you will see it building as a sustainable source of ongoing income, through regular gifts, legacies and other donations.

- **Get your senior management team behind you** – this is the only way your IG programme is going to work. Your senior management and trustees have to be committed to providing investment in it over the long-term, as well as understanding that it will take time to build profitability, and that some tests won't work. They also need to have enough understanding of the process to support you through it over time.

If you don't feel reassured that you have this commitment or realistic expectations from senior management you may want to question whether IG is the right thing for that organisation or whether you want to be the person trying to make it work there!

The next steps are to be taken once you have commitment from your senior management team.

- **Build an Individual Giving plan** – this needs to set out your aims and the activities you will undertake to meet them, as well as detailed budgets and income forecasts. Again, this may sound obvious but many charities in the UK with established IG programmes either have no IG plan or a very poor one. This makes it harder to see the bigger picture or whether you are making the right progress towards achieving your strategic aims. We'd suggest developing a detailed plan for the first year and then broader aims for the second and third years. ChangeStar can help you put together one of these plans, or train your team in how to do it in-house.
- **Review progress on your plan** – it's critical to take time to regularly stand back and assess your progress against the targets in your plan, including reviewing your results and how different fundraising activities have gone, and then make any adjustments to the next few months activities you need to. We suggest having a review meeting like this every quarter, as we do with our clients when providing them with strategic support.

Example - Humanists UK fundraising and communications plan

Humanists UK is the national charity promoting humanism – helping people to live good lives without the need for religion or belief in God, and campaigning against the overreach of religion into society. They had done a lot of campaigning and stored a set of names and addresses of people who had taken part in campaigns, but wanted to build their IG programme so that they could develop a sustainable base of funding, as they found it hard to get grants. So, they had a clear aim for the IG programme and an idea of the budget they had to spend. We then developed a comprehensive 5-year plan for them, which aimed to integrate their campaigning and fundraising messages so that when someone joined in a campaign they were then asked to donate and to commit to a regular monthly gift. We also looked at other ways they could recruit new supporters – like through Facebook advertising, which was very effective for them. Since the initial plan their membership base has grown massively and they now have a successful IG and membership programme generating a good level of ongoing income.

Lesson 2 - Do a touch point review before spending money on recruitment

Recruiting new supporters is the most expensive part of IG fundraising – partly because of the cost of using media and channels to find potential supporters, and also because many of these media titles (such as a particular magazine) can only reach a few people who are the right target audience for your charity – so a lot of money is wasted sending messages to people who aren't.

So, before you spend money on trying to locate these people through expensive channels, you need to focus your supporter recruitment activity on people you know actually care about your cause – in other words, those that come into contact with your organisation on a day-to-day basis, in whatever form, whether it's through your website, events, services, reception desk, social media or anything else. These touch points are also low cost or even free to access, as your organisation owns them.

To do this we suggest running a touch point review - something we have helped a number of charities to undertake. This is a process in which you **review all the ways in which individual members of the public might come into contact with your organisation** (we call these 'touch points'), and then identify the most effective ways to use each touch point to ask people for donations.

Below is a quick summary of how the process works:

- List your touch points – and for each one estimate the number of people it comes into contact across a whole year. For example, 'Website - 1,000,000 people per year'.
- Use this list to prioritise the most important touch points to work on first – i.e. those that could make the most impact on your fundraising income. This ranking could be based on a mix of how many people you encounter in each touch point, the likely commitment and responsiveness of these people and how easy it will be to set up a strong fundraising ask in that touch point.
- Evaluate what the charity is currently doing to recruit new supporters from each touch point. For example, 'Website - donation button linking to one-off donation page'.

- Then work out how you can use this touch point more effectively to recruit supporters and fundraise. For example, 'Website - increase size and prominence of donation button. Link to monthly regular gift page. Simplify the RG form to make it as simple as possible to fill in'.
- And the final, key stage is to have a clear supporter journey for following on from each touch point (keep it simple to start with) and integrate these into your overall IG communications plan – otherwise your efforts in recruiting them will have been wasted.

This can take time to do but it's well worth it, as these touch points are your most important resources for IG fundraising. The example on the next page illustrates the level of detail that you can go into for one touch point in order to optimise it for fundraising. And if you apply this to all your touch points, you will be making the most of your opportunities to recruit new supporters from every source.

Example - Albion in the Community (AIRC) touch point review



AIRC - the community charity linked to Brighton & Hove Albion football club - commissioned us to run a touch point review and then build a regular giving product. We suggested they promote monthly regular gifts as the core way of giving to the charity through these touch points. We won't discuss the whole review, which was very detailed, but we can use it to illustrate how each charity may have a unique set of touch points.

AIRC had the usual touch points such as a website, social media and emails that we included, but they also provided football schools to kids in the community. When we examined that touch point and considered how to optimise it for fundraising, we saw that the charity has a reception table at the football pitch when parents turn up to drop their kids off. We realised this was a chance for the people on the desk to make a simple RG ask to the parents when they picked their kids up – not when they dropped them off as they may be in a rush at that point.

We therefore asked the people on the desk to say one sentence to promote regular giving to each person as they left – 'Would you like to support our work and join us as a community champion? You'll get 10% off soccer schools and some other great benefits'. They would then show each parent the welcome pack for the RG scheme, featuring badges and other nice benefits. The parent would be encouraged to fill in the form there and then, so they didn't forget to do it, and if they did, they could be given a welcome pack at the time, with something to take home. Those that didn't sign up would be given a leaflet and followed up in the soccer school email with a reminder ask.

Lesson 3 - How to raise funds for difficult causes

Many non-profit organisations and groups represent causes that can be niche or divisive, like refugees or political issues. ChangeStar has worked with many causes like this, and below we offer some suggestions on how to approach raising funds for them - specifically, in relation to recruiting new supporters.

If you have a more controversial or difficult cause you may worry about:

- Having a much smaller target audience and pool of possible supporters to access
- Some people being against your cause - perhaps due to some form of prejudice etc.
- The danger of controversy and alienating lots of people
- A lack of resources - people, financial - this is a real issue for many 'difficult' causes
- Competition - why would people give to your cause rather than a sexier, cuddlier one?

Fortunately, some of these challenges may not be so significant when we adopt a targeted, focussed approach.

The central issue is that there are some charities out there who can potentially appeal to a very wide audience because a lot of people are interested in their cause – e.g. cancer research or animal welfare. These causes are also uncontroversial – no-one is going to be against cancer research. The two differences when you are raising funds for a difficult cause are that a) fewer people will be interested in your cause and b) some people will be actively against your cause.

The good news is though that, **whatever your cause, you DO have an audience**, and this can really focus your attention. Your aim is to find these people who care about your cause and communicate your message to them in an emotive way.

Your job is not to try and make your cause accessible to everyone, as that's just

not possible. And this is a trap that less controversial charities fall into when they try to dilute their messages to appeal to everyone – because they fail to engage the people who do care about their cause. And the other good news is that you can just ignore the people who are against your cause because they're very unlikely to donate!

Here are a few steps you can take:

- **Focus on your target audience** – however niche or controversial your cause is, you will have an audience that cares about it and is willing to donate. You just need to find it. To do this you need to...
- **Understand your audience** –to get to know who the people are who might care about your cause, including their profile, interests and beliefs about other issues including politics. For example, potential supporters of a refugee charity might be middle age, enjoy going for walks and have liberal political views. Build a profile of them. There may be several types of people that might support you so build several profiles. This will help you think about where to find them.
- **Think about where to find them** – use these profiles to help you think about the media and channels they might use and that you could use to target them. For example, in the UK, if you're thinking of putting inserts in magazines, you could select liberal political titles, those relating to the outdoor life etc.
- **Be bold in how you communicate with this audience.** Talk to them in a way that will motivate them – with emotion, clarity, conviction, passion. Don't worry if it alienates some other people as you're not trying to raise money from them, and don't try to be all things to all people in a bid to reach a bigger audience. This will dilute your message. Instead, focus it.



Consider this pack we did for Greenpeace. Everyone knows Greenpeace - they are a dynamic, uncompromising, action-led organisation whose team go to great lengths to protect the natural world. Look at the language and the pictures - it's powerful, opinionated, emotive stuff, which will alienate lots of people who aren't their audience, but their own audience loves it. It raised hundreds of thousands of pounds and got brilliant results - some of the best they've ever had. So, be bold and passionate.

- **Going beyond your target audience** – if you feel you've got the most you can out of your core target audiences and need to recruit more people from wider audiences you can seek people who could be convinced by parts of your cause. Here are a few approaches to this:
 1. **Test a simple adjustment of the message you are using to your core target audience**, or try toning down the language rather than diluting the message. Make an appeal to universal values such as fairness and justice.
 2. **Find 'hooks' – different ways into your cause, instead of the whole cause.** This enables you to test some different theme - for example, the impact of your cause on issues such as health, education, politics, children etc. An example here is a press ad we produced for Humanists UK - a charity helping people to live good lives without the need for religion or belief in God, and campaigning against the over-

reach of religion into society. After running a few general fundraising press ads about their work, we produced a fundraising advert about the overreach of religion into one specific area – education. This proved very successful.

3. Following on from this idea of hooks, if you can find a hook, try to **identify some specific audiences who might care about an aspect of your cause** relating to one of these hooks, and who have specific media titles you can target. In the case of the Humanists UK education ad, this might be teachers and parents of schoolchildren.

See the next page for an example of successful supporter recruitment for a potentially difficult cause.

Example - British Pregnancy Advice Service (BPAS) fundraising press ads

EVERY DAY WOMEN ACROSS THE UK ARE HARASSED AND INTIMIDATED WHILST THEY SEEK MEDICAL TREATMENT.

You can help end their ordeal by giving £25 today.

Familial campaigners are increasingly protesting outside UK abortion clinics, confronting and intimidating women who are attempting to access a legal healthcare service in confidence. By making a donation today, you can help to create safe zones around clinics to stop the harassment.

Shouted at, bullied and even threatened - this has to stop
Many women confront aggressive clinic attendants, being kept barriers with obstructing signs and blocking paths, the constant shouting and intimidation. Others follow women making their way through and trying to scare them away from treatment when their women identify themselves as experienced with patients in hospital. This is not a safe place to be. It could well be a sign to call the police and the clinic always come out to help if it is threatened.

Imagine if you were filmed or felt threatened when accessing medical treatment
No one else experiences this kind of bullying or intimidation when accessing healthcare. Respect the health of a patient, personal life, and people should be free to make choices in private. Please support BPAS (British Pregnancy Advice Service) to fight for legislation to create safe zones and end the harassment of women.

It distresses healthcare workers too
Nurses and staff are also being targeted, reports women who have been followed by protesters when leaving their place of work. These healthcare professionals should be able to go to work without the fear of being treated.

We can end the intimidation
The belief in freedom of speech - and if people want to campaign to protect women's reproductive choices, there are plenty of ways when they do so. But the special circumstances include stress shouldn't be one of them. With your help, we can establish intimidation-free zones outside centres to safeguard women and healthcare staff.

Your support can help us campaign for a change in legislation
We urgently need your support to help us lobby for legislation that ensures women can access pregnancy advice without any interference or bullying. Other countries already have this legislation in place. Your gift today will help make sure that women can make their own personal decisions about their own pregnancy.

This is how your donation could help
 £8 could help us collect legislation on a petition to get safe zones discussed in parliament.
 £15 could help us work with members of parliament and other influential groups to get the case forward for legislation.
 £25 could help us raise legal challenges to ensure the police protect women from harassment.

To donate, visit www.bpas.org/donate or complete and return the form below. Thank you.

YES! I want women to be able to make decisions about their health without intimidation and harassment

I'd like to give:
 £25 £15 £10 £5 Other £
 enclosed cheque payable to BPAS
 wish to pay by Visa/Mastercard/Amex/Debit/Apple Pay

Card No: _____
Start Date: _____ **Expiry Date:** _____
Issue Number: _____ **3 Digit Security Code:** _____

Please return to: FREEPOST BPAS, 10-11 Farnwell Street, London EC4A 3UQ. You can also donate online at www.bpas.org/donate.

bpas

In 2016, abortion is still illegal in the UK and punishable with a life sentence. Give £25 today and help us stop this outdated law – and give women a choice.

In 1968, ending your pregnancy was made a crime punishable by life imprisonment. Despite reforms in the 1990s, this 50-year old law still stands – and women today are still not trusted to make their own decisions about their pregnancy. With your donation of £25, we can give women proper choice by removing abortion from the criminal law for good.

DID YOU KNOW?
 1 One in three women in the UK will have an abortion.
 2 More women aged 35 or over have abortions than women under 20.
 3 Our legislation is outdated, unfair and unsafe for women.

There is something you can do to change this ridiculous law!
YES! I WANT TO HELP DECriminalISE ABORTION AND GIVE WOMEN A CHOICE BY GIVING:
 £25 £15 £10 £5 Other £
 Just £25 could help us collect signatures on a petition to get this outdated law debated in parliament.

YES! I WANT TO HELP DECriminalISE ABORTION AND GIVE WOMEN A CHOICE BY GIVING:
 £25 £15 £10 £5 Other £

Our abortion laws are hopelessly outdated
Everyone should be able to make choices about their healthcare. Yet a Victorian law gives other people control over a woman's body. Legally, most doctors have to approve a woman's request for terminating a pregnancy. But getting approval can be distressing and humiliating. Any woman who ends a pregnancy can still be penalised, wrong for not having received permission. The world has moved on, safety since 1968. It's time to back the law you history.

Women are suffering as a result
Abortion care must be provided according to the latest clinical practice in 2016. Women are suffering because 2 doctors must approve their request. It's time to give women a choice of a safe abortion.

Your donation will help us campaign to get the law changed
It may be a long battle, but it's one we'll win with your support. At BPAS (British Pregnancy Advice Service) we've already made our abortion rights campaign to free women's choices. Now we need your support. Make a donation today and help us campaign to decriminalise abortion.

To donate, visit www.bpas.org/donate or complete and return the form to the right. Thank you.

bpas

The British Pregnancy Advice Service is a charity that provides abortion services and campaigns for the right of women to access abortions safely. This is obviously an emotive issue that divides opinion - especially as, at the time of us working with them, they were campaigning for safe zones around abortion clinics, as anti-abortion protesters were intimidating women who were trying to access these clinics.

BPAS wanted to recruit new supporters, and as there was no way of being able to target people directly who cared about this issue, we used press advertising in national media to draw out people who would care about this issue.

We built a simple profile of the target audience, including people who were liberal, interested in politics, human rights and literature. We used these variables to select media titles to use. We chose progressive liberal media titles, including left wing political magazines, as well as literary magazines as we thought these a good starting point to find the audience.

In the creative we produced, we aimed for a hard-hitting, passionate approach to highlight a) threat and b) injustice, to build emotions in people who already care about this issue. So, we were deliberately targeting people who care, not trying to make the cause accessible to all.

Results were interesting and prove our point. These ads didn't work in some media titles. But in others, they did incredibly well, and we knew we'd found some places where their niche audience could be found. This helped us to learn where we should invest more recruitment money.

Lesson 4 - When recruitment is working, spend more on it

We've said that recruiting new supporters is the most expensive part of fundraising. So, if you're going to go beyond your existing touch points and spend money on activities like door drops, press advertising or Facebook ads, you need to make sure you're getting the best value from it.

We all know that direct marketing is a science, and that IG is about testing different approaches and seeing what works best – for example, testing the same advertisement in 2 different media titles. What some charities forget however is **the importance of rolling out recruitment appeals in larger volumes when tests have been successful.**

This is a critical lesson, as it's such a wasted opportunity – and sadly, the BPAS examples we presented in point 3 were examples of that – they did well in a range of titles but BPAS sadly didn't invest in more ads to more people in those titles.

On a personal level, there's nothing more depressing as the head of an agency than seeing the recruitment appeals that your team has worked so hard to produce and target working well in a test, and then the charity client fails to roll it out. Why is this so annoying? Because it's such a waste! It costs a lot to test supporter recruitment appeals – developing creative, media costs, staff effort – and it doesn't always work, which can lose charities money. So, the only way to make this money back is when a test does work, to roll it out in bigger numbers – and this is the essence of how to build your supporter base. So, **be brave and focussed and invest more when tests work – in fact, keep investing until they don't work anymore.**

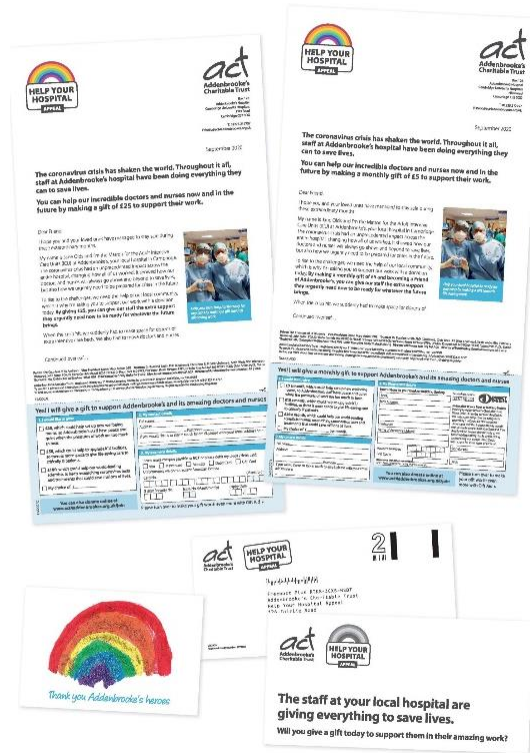
One reason charities might be reluctant to invest more after a test is if they've run out of money – but this shouldn't be happening if you've planned properly, as we discussed in the first lesson – because **you will have put budget aside to roll out successful tests**, and your senior management team will understand that this is a calculated risk and an essential investment.

Another reason charities might be reluctant to roll out successful tests is that they might just be bored of that appeal and want to move on to something different

and more exciting. **Beware of this desire for novelty** – the art of building a good individual programme is to do the boring stuff well and if something is working keep doing it – especially in supporter recruitment.

On the next page is an example of a client that was brave and invested money after their tests proved to work.

Example – Addenbrooke’s hospital door drop



Addenbrooke’s Hospital is based in Cambridge and is one of the leading hospitals in the UK, both for its hospital care and its research work, and for several years now we’ve helped them successfully build their IG programme. During the COVID-19 pandemic there was a massive surge in goodwill and gratitude towards the national health service and all the doctors, nurses and other health professionals who were helping people and saving lives during the crisis. We decided to run a door drop campaign to recruit supporters in the East of England, where the hospital is based.

We tested two door drop packs - one with a cash ask and the other a regular giving ask - to recruit new supporters, which focussed on the wonderful job the NHS was doing during the crisis and gave people the chance to do their bit to support it by donating to their local hospital. The results were spectacular – better than 2:1 ROI overall, including better than 1:1 year 1 ROI on recruitment to monthly DD, which is incredibly rare in recruitment appeals. As soon as we saw the results coming in, we were urging the charity to book another door drop for that pack, in larger numbers, as there was clearly a limited window of opportunity when people would feel so strongly about the hospital. The charity took a while, but they secured the budget in the end and mailed it again in larger numbers. It did brilliantly. And they did it again, and again. And they’re still sending that pack – or a variant of it – that they started sending during the Covid crisis – because it still works. **By investing when a test worked, and continuing to invest until the results told them not to, ACT recruited thousands of new supporters.**

Lesson 5 - Get the basics right

It is critical to maximise the long-term value of your existing supporters before you begin substantial additional recruitment activity, as these are the people that are most likely to support you again, and that you've probably spent time and money recruiting. So, you need to choose the right activities.

Unfortunately, many charities (including hospitals) focus their time and investment on the wrong supporter development activities or their activities suffer from poor execution, which both lead to them raising much less income than they could do.

So, here are some of the key activities to prioritise. This may seem basic but many charities aren't doing these as well as they could, if they are doing them at all. To maximise your income from supporters **make sure you are focussing on the activities that will maximise your long-term income**. We will just focus on a few key activities below.

Regular giving

First, you need to focus on asking people for regular monthly gifts when you possibly can, as these will get you the most long-term income. Everyone knows this but many fundraisers don't build their activities to make this happen and they waste opportunities to do it. This is particularly important in hospitals in supporter recruitment, given that you have a large warm audience of prospects in and around your sites, giving you a great opportunity to make a regular giving ask.

You need to make it clear to supporters that the way **you'd prefer them to give to you is through regular gifts**, although you're grateful for cash gifts too if they can't do that. This focus on regular giving should ideally start in your recruitment activity if you are lucky enough to have a cause that has enough warm prospects coming through its touch points to do this (such as hospitals or football club charities), but whether or not you are recruiting through cash gifts, regular gifts or lead generation, once a contact is on your database you need to make sure you

ask every individual contact to give a regular gift – and make this ask when you have the best chance of success. This will be at two points:

- **Ongoing RG conversion asks** - these should be sent shortly after the new contact has had their first contact with your organisation, regardless of the type of contact – an enquiry, campaigning action or donation, for example. These are all people who've shown an interest in your cause. So, make sure you send an automatic email or letter with a strong ask for a regular monthly gift within a week of someone enquiring, campaigning, donating or just contacting your charity for the first time. This is an ongoing process that can be automated for different groups.
- **Annual conversion/upgrade ask** - with the above ongoing asks in place, everyone will receive a RG conversion appeal upon their initial contact with the organisation. In addition to this, make sure you send every individual contact a regular giving conversion ask once a year – ideally using telephone, but if not mail, or for lower value contacts, email. This is to maximise your chances of the supporter being in a position to support you in this way. You can adapt this communication to be a RG upgrade appeal too, for people who are already giving a regular gift, to ask them to upgrade the value of this gift. The ask levels in this should be personalised according to the giving history of each donor, in order to optimise their giving levels.

Legacy appeals

Gifts in wills may be one of your biggest opportunities for long-term income generation. 20 years ago, charities were nervous about talking to supporters about death, and in asking directly for legacies. But this has changed, as this nervousness was a huge mistake. First, the potential income you can get from legacy fundraising is massive – the average value of a charitable legacy in the UK is over £60,000 ([Legacy Foresight](#)), so it's crazy not to ask people for them. Second, asking people in a sensitive way to leave a gift in their will does not offend them – when we asked our clients about this, they said they receive fewer complaints about legacy appeals than normal cash appeals.

You therefore need to ask for legacy gifts – but you need to do it in a particular way:

- **'Drip feeding' asks** - your charity may already be putting legacy asks and messages throughout your communications to supporters during the year – such as newsletters or emails – to make them aware that they can leave legacies to your charity. This is good practice and is important to do as it can make a real difference in making them aware that you'd like these gifts.
- **Dedicated annual legacy appeals** – the bit many charities don't do however, and that you must do, is send a dedicated legacy appeal mailing to your supporters every year. One of our clients analysed the difference that sending this annual mailing made to their legacy income, and **they found it multiplied the number of legacy pledges they received each year by 8 times** the amount they got from just drip-feeding legacy messages. Try it out on a segment of supporters initially if you want to – but make sure you extend it to as many supporters, volunteers and database contacts as you can – because the value of just one potential gift is so high that it's worth it, and because legacy prospects aren't just people who are cash rich like one-off or RG donors – they might be cash poor but asset rich. See the next page for an example of a dedicated legacy appeal.

Example - Sightsavers legacy pack



Sightsavers asked us to develop a legacy pack for them. We felt they had an incredibly powerful legacy proposition, which was that gifts in wills have a realistic chance of eliminating the disease of Trachoma from all the areas that the charity works in within a decade or two - potentially saving the sight of millions of people.

We believe the aim of these legacy appeal packs should be to inspire people about the difference they could make to your cause if they leave a legacy – and how good that could make them feel. It also needs to ask them to pledge a legacy.

For Sightsavers, we produced a modular pack, including a folder in which the enclosed items could be changed over time. These items included a booklet with a timeline to illustrate the achievements and credibility of the organisation to date, and its possible impact in the future, a letter from a legacy pledger (to provide peer evidence of the value of legacies and the satisfaction of leaving one), a pledge form so the recipient can let the charity know their plans, and a personalised cover letter to emphasise the impact the recipient could have with a gift in their will, and how good this might make them feel. The pack performed very well, generating a number of legacy pledges and end enquiries to be followed up.

Thanking

The most 'basic' point to mention, and perhaps the most important way to build loyalty from your supporters, is to thank people properly. We have already set out some of the things you can do to ask your supporters for money, but your actions and communications once they've given some money will really affect how they perceive your cause and their loyalty to you in the future. So, make sure you thank people quickly (within 24 hours of their gift if possible) and in the most personal way possible.

Ideally you would pick up the phone and thank every supporter individually but this is unlikely to be possible for most charities. In this case, think carefully about how you can get as close as possible to this with the resources and time you have. One possibility is to commit to calling people who've given gifts above a certain amount (which will depend upon your team's capacity) and emailing the rest.

Of course, supporter care isn't simply about how you thank people. It is about how you can build strong and mutually beneficial long-term relationships with your supporters for the long-term, not simply a series of transactions. Make sure you give at least as much thought, care and attention to how you build these relationships over time as you give to your fundraising activities.

Summary

A quick recap on the 5 lessons:

1. How to start an Individual Giving (IG) programme
2. Do a touch point review before spending money on recruitment
3. How to raise funds for difficult causes
4. When recruitment is working, spend more on it
5. Get the basics right

Follow these 5 lessons and you'll give your organisation the best possible chance of building its income from individuals.

More information and next steps

We hope you have found this toolkit useful. If you have, please feel free to share it with your colleagues and networks - both online and in person.

If you have any questions, want to find out more or want to see how ChangeStar can help you with any aspect of your fundraising, please contact Richard, our director, on richard@changestar.co.uk or on 01273 96418. We'd be pleased to arrange an initial meeting with you free of charge, to discuss where you're at.

Finally, you'll find lots of videos and articles giving advice on all areas of fundraising and seeking change – from writing strategies to developing successful appeals – on our website at www.changestar.co.uk. While you're there you can sign up to our occasional newsletter to receive news of our other free resources, including our regular free online workshops.