



IMPROVING THE DONOR EXPERIENCE

Institute of Fundraising

The Institute of Fundraising (IoF) is the professional membership body for UK fundraising. We support fundraisers through leadership and representation; best practice and compliance; education and networking; and we champion and promote fundraising as a career choice. We have 575 organisational members who raise more than £10 billion in income for good causes every year, and over 6,000 individual members.

www.institute-of-fundraising.org.uk

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FOREWORD FROM SALESFORCE.ORG



We believe trust is pivotal to everything we do. And we know that this value is important to the nonprofit community as well. Last year, the Commission on the Donor Experience recommended best practices for charities in the UK to improve donor experiences and donors have been demanding that we change. Change takes time, and effort on behalf of each person within an organisation. Change also needs the support of your communities and your partners. In fact, the results from this research show that change is already under way, and that it is not only the larger organisations, but charities of every size that are making this a priority.

I hope you gain insights from this Donor Experience Project report as I have. It highlights how charities are investing efforts to better understand themselves and their donors and also how they are realising the benefits of meaningful, deeper connections with their donors. Today, we see the Donor Experience Project evolving from a set of best practices into a conversation within the sector, and a movement in its own right. This report is the continuation of a journey for the sector, one that includes its supporters and its industry partners.



Salesforce.org is proud to partner with the Institute of Fundraising on this project, and we are committed to supporting charities as they assess, design, and implement donor experience strategies across their organisations. We are ever inspired by the impact fundraising organisations have on those they serve, and the innovative ways that they accelerate that change. We are on this journey with you and look forward to a future where donors grow closer to their true impact.

Rob Acker, CEO, Salesforce.org

FOREWORD FROM THE DONOR EXPERIENCE PROJECT



The Commission on the Donor Experience's *Blueprint for Transforming Fundraising* opens with the observation:

“So deeply ingrained is the short-term, target-driven culture across fundraising in the UK that significant numbers of practising fundraisers, their leaders and their agents still struggle to genuinely understand this. Our purpose therefore is nothing less than a culture change among fundraisers and within the organisations that employ them, particularly their leadership and senior management teams.”

It is this desire to change the culture of fundraising that continues to drive the work of the Commission forward, in the form of the Donor Experience Project.

The Donor Experience Project welcomes this report, initiated by the Institute of Fundraising. The findings indicate that change is beginning to take place. It is clear that providing excellent donor experiences is of critical priority to many organisations. But it is also clear that the sector finds it challenging balancing short-term income targets against longer-term donor experience activities.

We recognise that cultural change takes time. Progress will be slow. But, if we are going to truly change the culture of fundraising in the UK what the sector really needs is:

- Genuinely inspirational fundraising leadership – practitioners who have the gravitas to champion real change
- Supporter-centric behaviours being role modelled every single day – we have to practice what we preach
- Improved and streamlined systems and processes to enable organisations to listen and respond effectively to supporters needs
- A comprehensive overhaul of how fundraising success is monitored and managed – we need to move beyond financial indicators and develop new measures that combine financial and non-financial supporter engagement perspectives

We look forward to continuing our work with fundraisers across the sector to improve the experience of donors. Our goal is to help fundraisers deliver a great experience so everyone feels good about giving.

Chris Washington-Sare
Chair, Donor Experience Project

For more information on the outcomes of the Commission and the future work of the Project, please see www.institute-of-fundraising.org.uk/groups/sig-donor-experience

ABOUT THE SURVEY

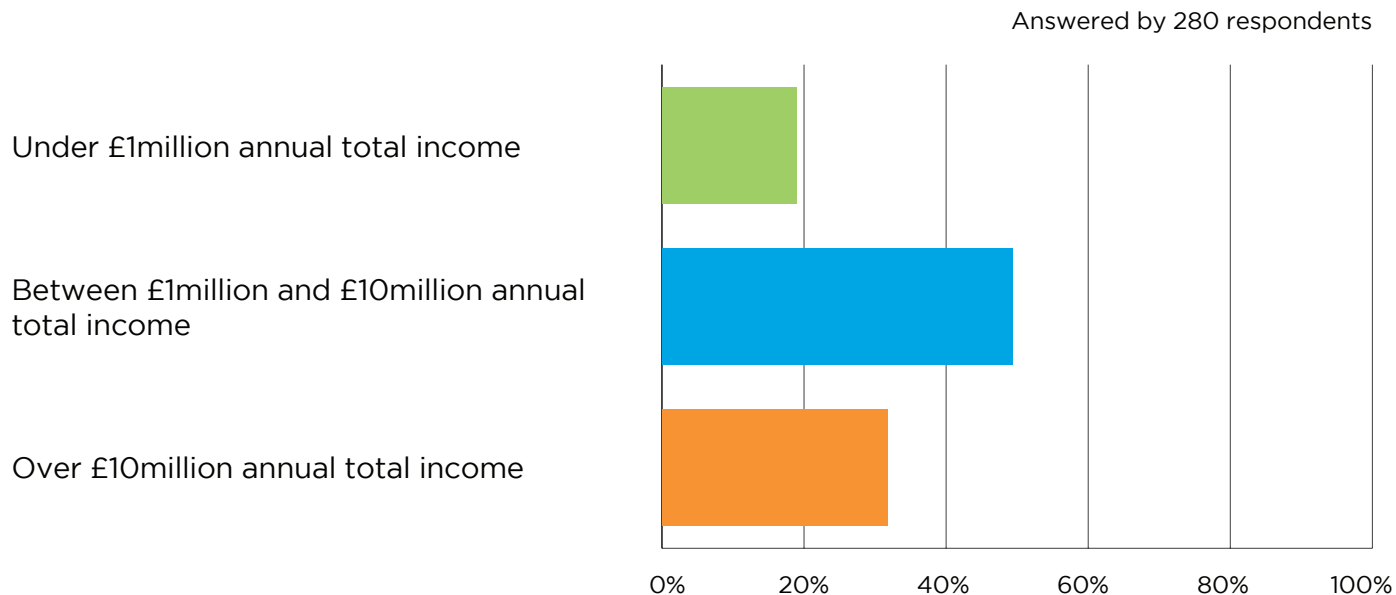
The Institute of Fundraising carried out a survey to find out what charities are doing to improve the donor experience following the publication of the projects from the Commission on the Donor Experience in July 2017.

The survey received 325 responses, the majority were charities (92%) and the rest suppliers. The survey was promoted to the Institute of Fundraising's members and more widely to the fundraising community through our emails and marketing channels. The survey was open from 24th April to 9th May 2018.

For the purposes of this research, small charities were defined as under £1m annual total income, medium charities between £1m and £10m, and large charities over £10m.

The results of the survey have been rounded up or down to the nearest whole percentage. Quotes and comments from respondents are included throughout, as well as three snapshot case studies from charities who are striving to improve the experience of their donors.

Breakdown of the overall percentage of respondents from different size charities



KEY FINDINGS



74%

We're encouraged by the 74% of respondents who said that building great donor experiences with the aim of satisfying donors is the bedrock of their fundraising and communications.



28%

Only 28% of respondents said they include information on their donor experience as a regular part of their reporting to the Board of Trustees – a figure which we hope to rise in the future.

85%

**SMALLER
CHARITIES**

56%

**LARGER
CHARITIES**

Improving the donor experience is something that goes across all sizes of organisations – although it's interesting that smaller charities (85%) are more likely to agree with the statement 'we go out of our way to meet the needs of our supporters' compared with 56% of larger charities.



20%

20% of respondents say that their organisation is resistant to change and they don't know where to start.



**DONOR
EXPERIENCE**

Responsibility for the donor experience is more likely to sit at a senior level (CEO and Trustee Board) at smaller and medium-sized organisations than at larger charities where it is more likely to be a shared responsibility across teams and departments.



IMPROVING THE DONOR EXPERIENCE: ACTIONAID



Change lives. **For good.**

act:onaid

Deb Baker,
Supporter Communications

What area of the donor experience did we want to review?

At ActionAid, we facilitate a 1 – 1 relationship between a sponsor and their sponsored child. A crucial moment in a sponsor's experience with ActionAid is the moment they are made aware they can no longer sponsor the child they currently do. Our aim is to make this moment as positive as possible, less about our work ending in an area but more about how amazing it was that we had reached that point, and ensure they are inspired to sponsor a different child with us. The discerning factor in this decision is their experience with us up to and at that point.

The end to a sponsorship relationship can happen for many reasons, but chiefly it is due to projects in the children's community achieving their objectives and coming to a natural end.

As the relationship between a sponsor and child is very emotive, ActionAid informing a sponsor it is time to say goodbye can lead to mixed feelings. Sponsors have previously expressed to us that they felt uninformed and unhappy when their sponsorship of a particular child came to an end – we needed to change this.

How we tried to improve the donor experience: a special communication

In 2017, a child sponsorship project in Nepal was coming to an end. As well as the usual phase out report we send to sponsors at this time, highlighting ActionAid's successes and achievements, we also sent a special letter to sponsors inviting them to write to the child they were sponsoring for one last time. Working with our amazing sponsorship colleagues in Nepal, these messages were delivered to the children as normal. Going above and beyond our normal process, the team in Nepal then arranged for the children to create an additional thank you and goodbye message for their sponsors. To ensure the best experience possible for supporters, we also photographed the children holding the messages they received from their sponsors to accompany the final message.

We seized the opportunity to test this type of additional communications impact on sponsors and sent them as soon as possible.

This activity allowed us to reinforce the tangibility and impact of sponsorship with sponsors at a time when they may be thinking of ending their support.

We know there is scepticism among the British public and some of our supporters about sponsorship. “Are the children real?”, “Do the children really write the messages?”, “Do my messages ever reach the children?” This activity directly answered these questions at a time when this scepticism may be acted upon – when we break the link with one child and invite the supporter to take up the commitment of sponsoring another child.

A fantastic response from our supporters

Our supporter contact team heard from several of the donors about what a joy it was to receive their messages and photos. Several sponsors shared their experience on ActionAid’s Facebook page. One sponsor commented how it was “great to receive the photographic proof” of the sponsored child with her message. The supporter was so inspired to share her experiences she independently encouraged other supporters to write to their child or support ActionAid in this way. She also had open debates with other Facebook users around the authenticity of ActionAid’s sponsorship model. She became a full advocate and influencer due to this communication.

Further to this, 90% of these supporters went on to sponsor another child with us, which is a fantastic result for the children and communities we work with. This reinforced just how important correspondence between the child and sponsor is to our programme.

What we learned about improving the donor experience and what we’re doing next

We learned that an additional message that directly answers sponsors fears about child sponsorship, at the right time, can have a huge impact on the donor’s experience and likelihood to continue their support. This learning will be rolled out across ActionAid International during 2018, and in the UK it has already impacted our plans.

In February this year we produced a communication for all sponsors, focusing on how much the sponsored children enjoy writing and receiving messages. We included a pre-paid postcard with the communication and encouraged sponsors to get in touch with the children. The mailed communication was also accompanied by a follow up email and blog.

On this occasion rather than ask sponsors to send their postcard directly overseas we asked them to return the postcards to us here in the UK. This has enabled us to monitor the response and capture the thoughts and feelings of our sponsors. The response to this latest mailing has been incredible, with a huge 11% response rate. When reading through the postcards the over-arching message from sponsors is “I have been meaning to write for a long time and then ActionAid sent me this postcard”, suggesting this easy to implement communication can have a big impact on the sponsors experience.

ATTITUDE AND LEADERSHIP

How are organisations thinking about the donor experience?

The importance of meeting the needs of supporters is evident in the responses, with 69% agreeing that this is something their organisation goes out of their way to do. Not surprisingly, many respondents (68%) also agreed that the money they raise is the primary concern for their fundraising team. However it should be noted that this does not inherently conflict with the other aims of building great donor experiences or meeting the needs of supporters.

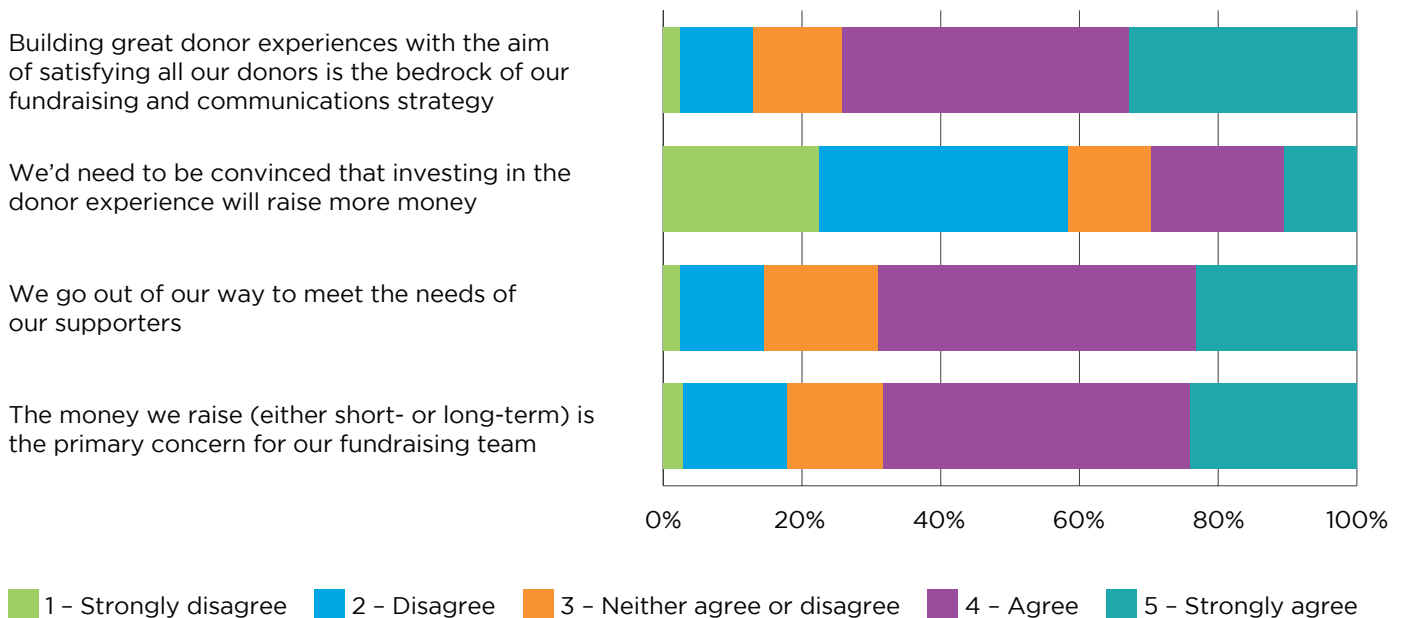
Interestingly, just under a third of respondents (30%) felt that they need to be convinced that specifically investing in the donor experience will raise more money.

When looked at by size of organisation, smaller charities were the most likely to agree with the statement that ‘they go out of their way to meet the needs of our supporters’, 85% of them saying they agree or strongly agree with the statement, compared with 72% of medium-sized organisations, and 56% of larger organisations.

A clear majority (74%) of respondents said that building great donor experiences with the aim of satisfying all donors is the bedrock of their fundraising and communications strategy.

All respondents

Answered by 210 respondents



Small charities

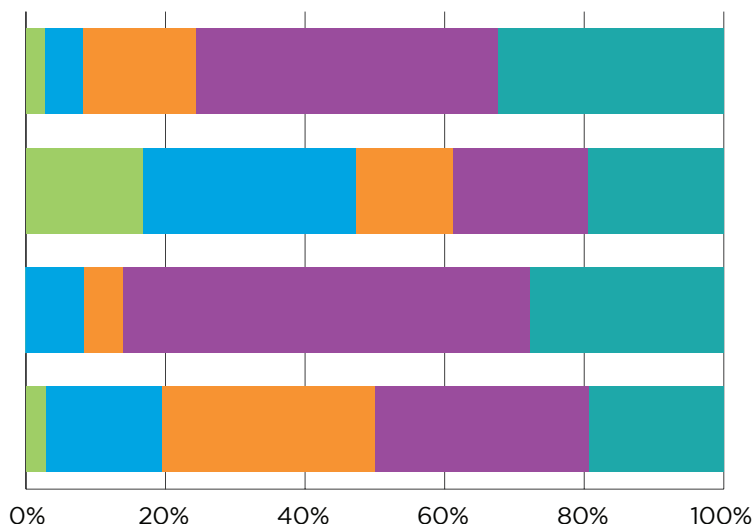
Answered by 37 respondents

Building great donor experiences with the aim of satisfying all our donors is the bedrock of our fundraising and communications strategy

We'd need to be convinced that investing in the donor experience will raise more money

We go out of our way to meet the needs of our supporters

The money we raise (either short- or long-term) is the primary concern for our fundraising team



1 - Strongly disagree 2 - Disagree 3 - Neither agree or disagree 4 - Agree 5 - Strongly agree

Medium charities

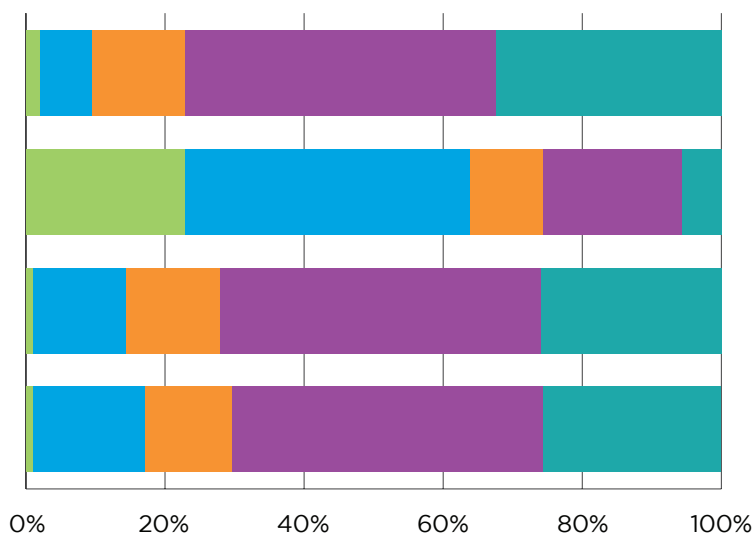
Answered by 105 respondents

Building great donor experiences with the aim of satisfying all our donors is the bedrock of our fundraising and communications strategy

We'd need to be convinced that investing in the donor experience will raise more money

We go out of our way to meet the needs of our supporters

The money we raise (either short- or long-term) is the primary concern for our fundraising team



1 - Strongly disagree 2 - Disagree 3 - Neither agree or disagree 4 - Agree 5 - Strongly agree

Large charities

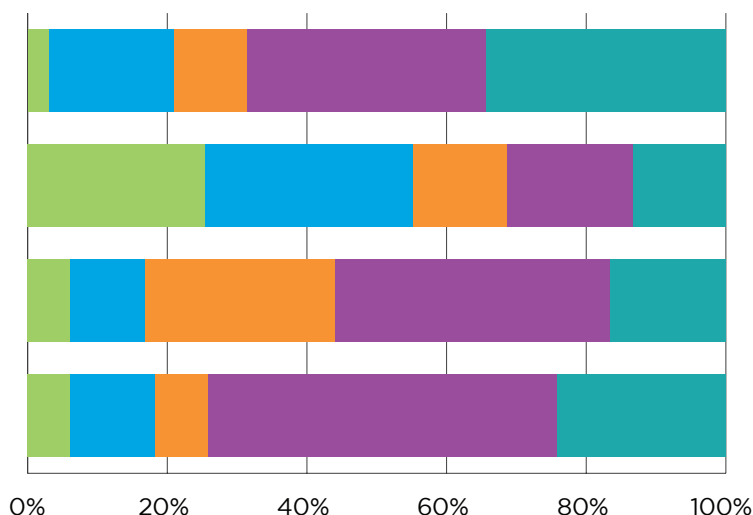
Answered by 67 respondents

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We'd need to be convinced that investing in the donor experience will raise more money

We go out of our way to meet the needs of our supporters

The money we raise (either short- or long-term) is the primary concern for our fundraising team



1 - Strongly disagree 2 - Disagree 3 - Neither agree or disagree 4 - Agree 5 - Strongly agree

Whose responsibility is it?

88% of respondents said that at least someone is responsible for reviewing the donor experience and instigating change within their organisation. The most popular option from 40% of respondents was to indicate that the responsibility was shared across teams and departments, with almost a quarter (23%) saying that the fundraising director has the main responsibility for this. Across charities of all sizes, 13% said that 'no one' was mainly responsible for this.

Not surprisingly, the responsibility is more likely to be shared across teams within larger charities, while in smaller charities it's most likely to be the Fundraising Director's task.

All respondents

Answered by 209 respondents

We have a dedicated member of staff whose main responsibility is reviewing the donor experience

Reviewing the donor experience is a specific shared responsibility across relevant teams and departments

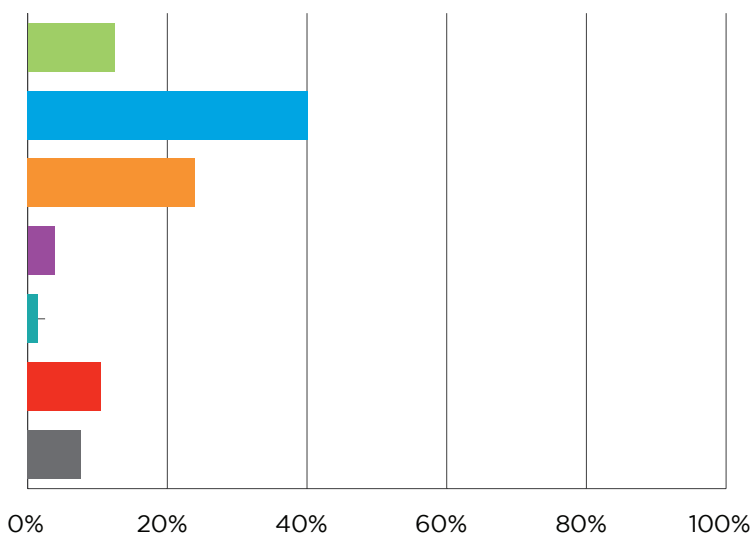
Our fundraising director

Our CEO

Our Trustee Board

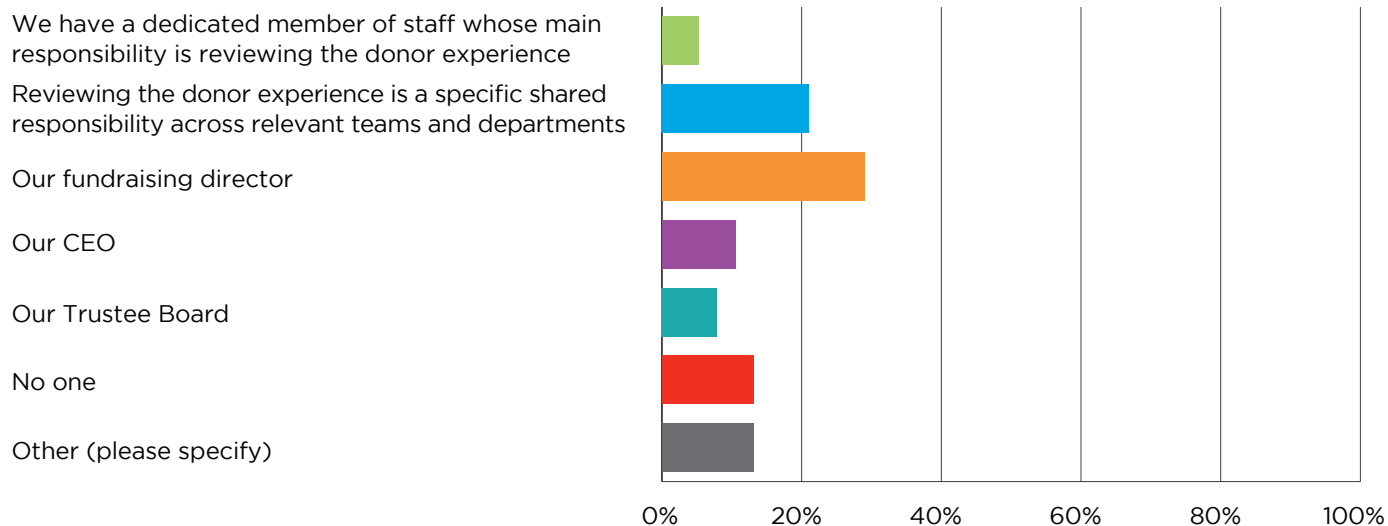
No one

Other (please specify)



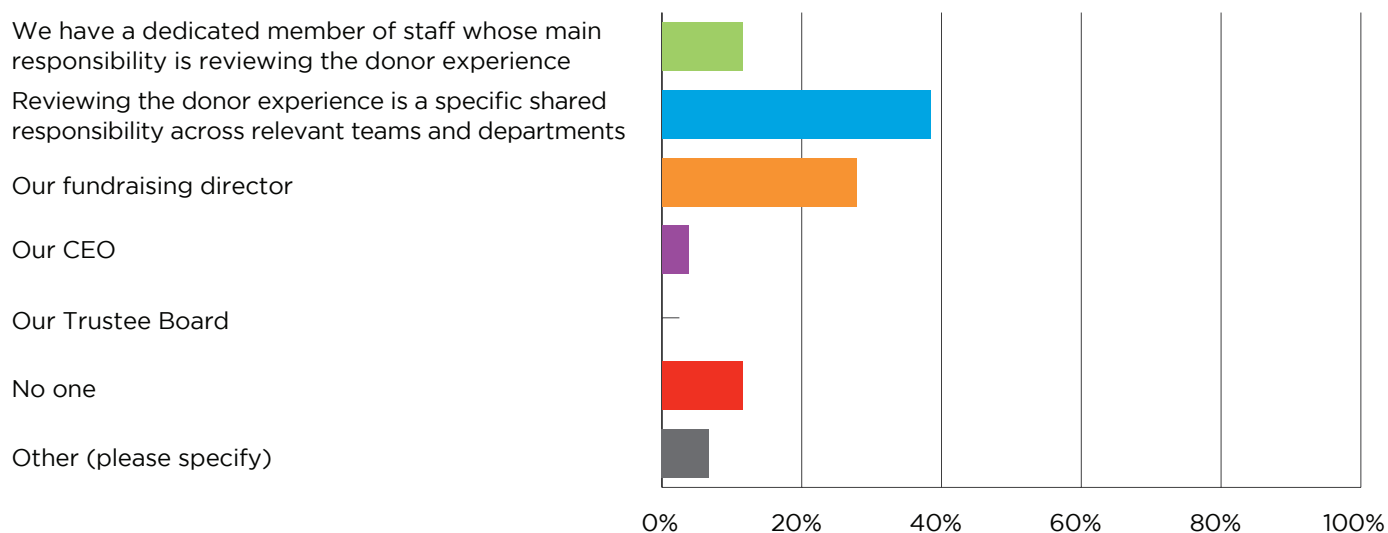
Small charities

Answered by 38 respondents



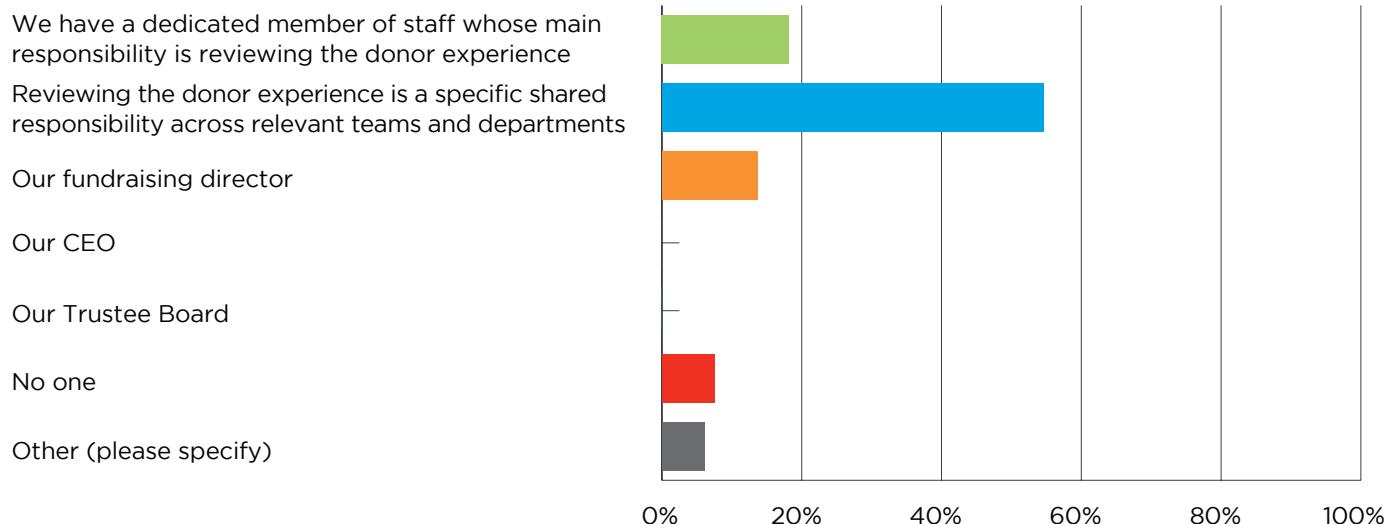
Medium charities

Answered by 104 respondents



Large charities

Answered by 66 respondents



“We created an entire organisation wide supporter engagement strategy and plan”



IMPROVING THE DONOR EXPERIENCE: MENINGITIS RESEARCH FOUNDATION



**Jenny Robinson,
Student Team Manager**

What we did

What I find my team lack most is time. It appears to be something everyone in the charity sector could do with some more of. However this is exactly what we had to find to be able to review and improve our student challenge programme.

My team took two days out of their very busy schedules, away from desks, phones and emails to focus on evaluating what we offer. We looked at everything in our programme including our communications plan, fundraising support, opportunities and resources as well as our donor journey from start to finish. We also took the opportunity to research and evaluate what other charities provide. The two days provided us with plenty of solutions, more questions and left us needing to find more time in order to make the changes we wanted to implement.

What we found out

It took even more time to implement these changes and there were plenty more reviews and improvements along the way. However, I took two main learnings from this process.

Firstly it's not about spending money. You can make plenty of improvements, whether it's the content of email communications and guides or creating some in house social media templates to keep on brand, it doesn't have to be expensive.

Secondly, most of the changes we made were about changing the ways we worked and the processes we had in place. Over time it became apparent that we were actually saving ourselves time through changing some processes. Just changing the way in which we offered our fundraising opportunities meant that we saved staff time as well as raising more funds.

How it's improved

Ultimately making these changes to our student challenge programme meant that we could provide a better donor experience through what we offer. We can now provide better fundraising support and opportunities to help student fundraisers meet their targets and take on their amazing challenges. For example the amount raised by students towards their totals from the fundraising opportunities we have organised for them has doubled since changing our processes.

It also meant that the time we had created for ourselves could be used to support our fundraisers more through university visits, bespoke fundraising plans, member talks designed to connect students to the cause as well as just having more time to appreciate the fantastic work our fundraisers do.

Why it's important

Offering the best possible donor experience is what we all want to provide. Ensuring our student fundraisers have a great experience as a fundraiser for us not only helps them to reach their fundraising target and attend their challenge but will potentially encourage them to support us in some form in the future and will help to maintain our reputation for being a worthy cause to support.

IMPLEMENTATION AND ACTION – WHAT ARE CHARITIES DOING?

How do charities engage with their donors?

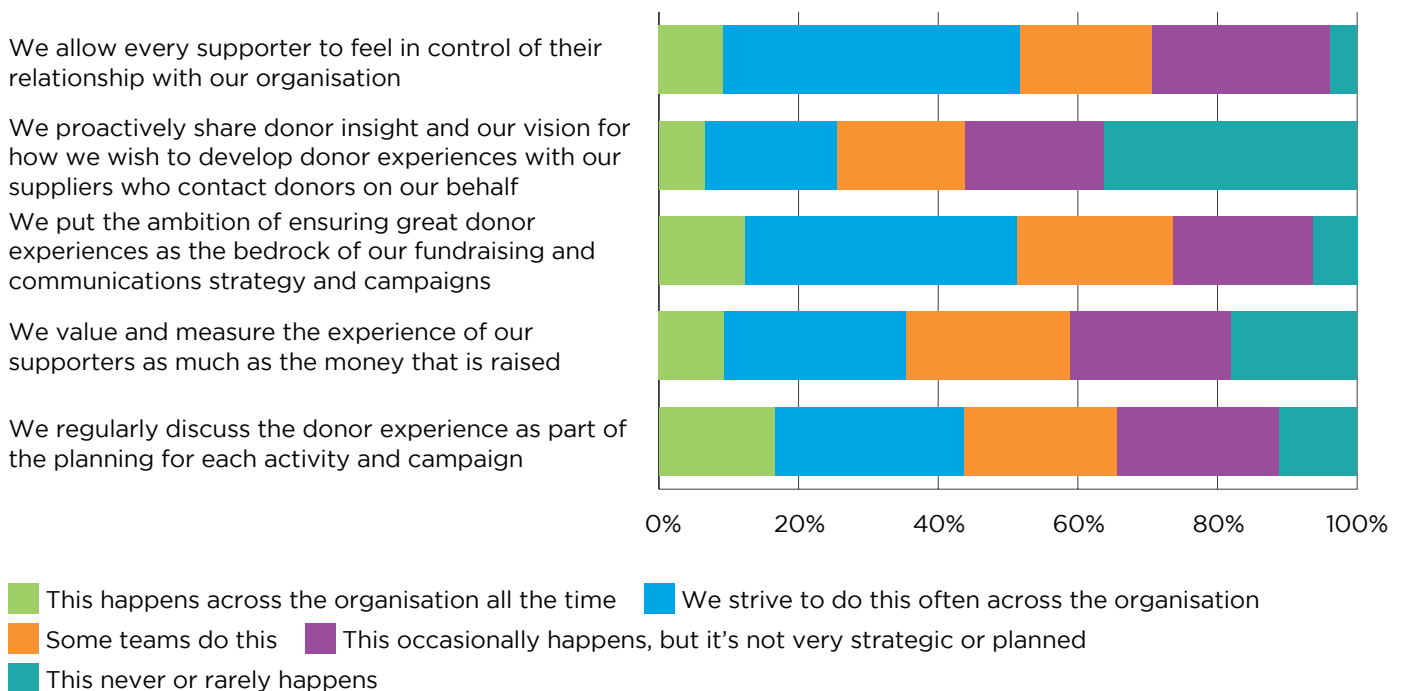
Of the different ways to engage their donors, allowing supporters to feel in control of their relationship with the organisation was done by 52% of all charities 'often' or 'all the time'. Organisations endeavoured to ensure that great donor experiences were at the bedrock of their fundraising and communications strategy and campaigns, with 39% of all respondents stating that they strive to do this.

44% of respondents said they regularly discuss the donor experience as part of the planning for each activity and campaign, and 49% of small charities said they were doing this either often or all the time (slightly more than the respondents from medium and large organisations).

The smallest charities find it most difficult to proactively share donor insight and their vision for how they wish to develop donor experiences, with 56% of those with under £1m annual income saying that it never or rarely happens.

All respondents

Answered by 208 respondents



Small charities

Answered by 37 respondents

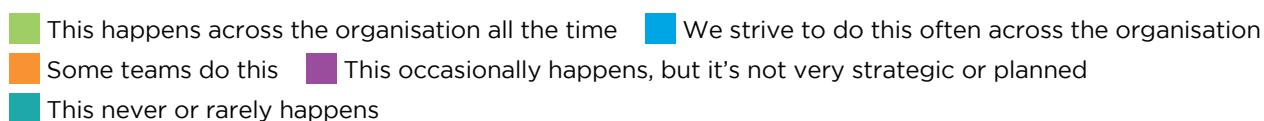
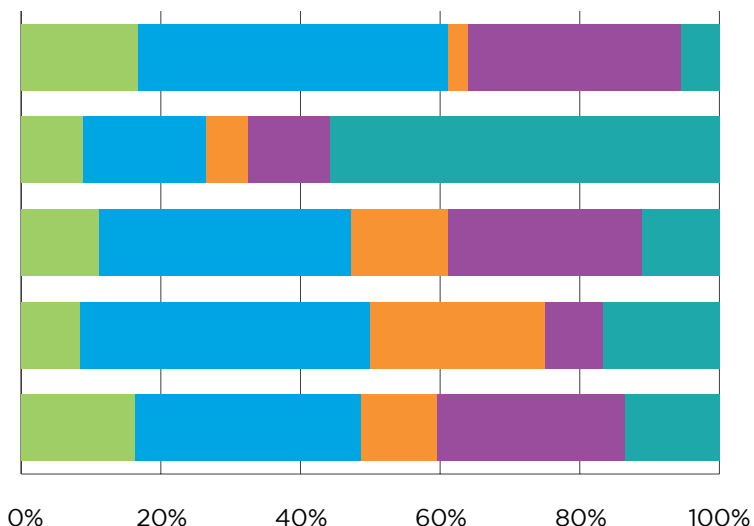
We allow every supporter to feel in control of their relationship with our organisation

We proactively share donor insight and our vision for how we wish to develop donor experiences with our suppliers who contact donors on our behalf

We put the ambition of ensuring great donor experiences as the bedrock of our fundraising and communications strategy and campaigns

We value and measure the experience of our supporters as much as the money that is raised

We regularly discuss the donor experience as part of the planning for each activity and campaign



Medium charities

Answered by 105 respondents

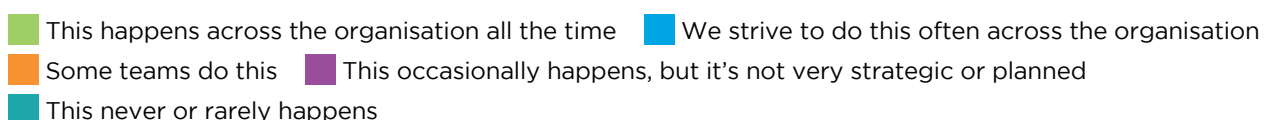
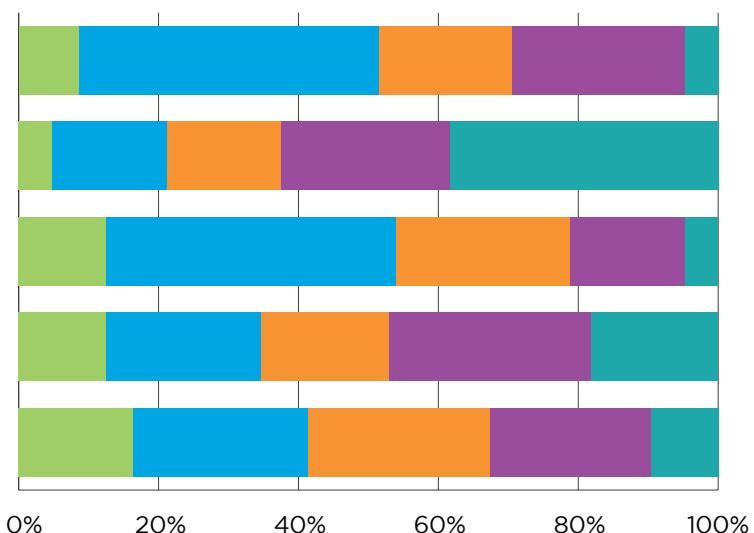
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Large charities

Answered by 65 respondents

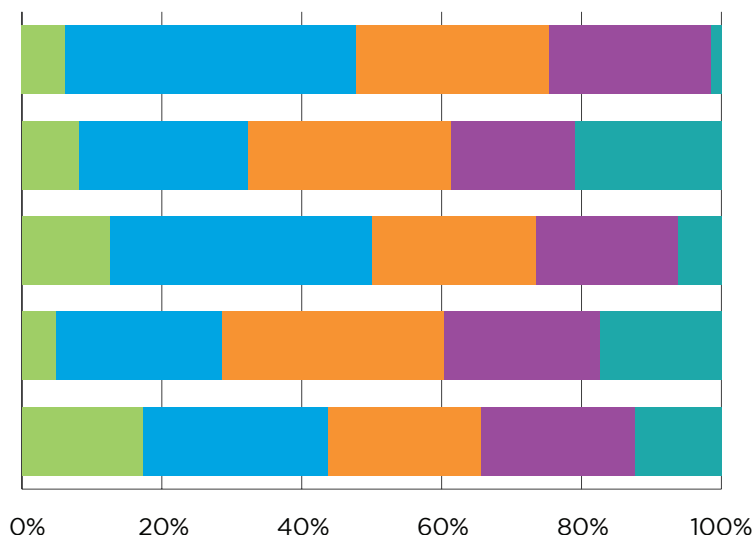
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We regularly discuss the donor experience as part of the planning for each activity and campaign



- This happens across the organisation all the time
- We strive to do this often across the organisation
- Some teams do this
- This occasionally happens, but it's not very strategic or planned
- This never or rarely happens

What actions have been taken?

When asked what actions a charity has taken or plans to take in relation to supporter communications, almost three quarters (73%) of respondents said that they send communications about their organisation's work without a specific ask for more financial support. Two thirds (67%) said that they give supporters the ability to immediately feedback when they contact them, with 65% also saying that they encourage supporters to get in touch with us to share views and experiences through all of our communications with them.

38% of respondents say that they have a Supporter Charter, Supporter Promise or similar agreement, permanently in place, with a further 38% saying that they are definitely planning or are considering putting this in place.

In terms of future plans, the most popular future plan that charities say that they definitely will do or are considering doing (42%) is to 'ask our donors which areas of our work or cause they are particularly interested in'.

All respondents

Answered by 179 respondents

We send some communications (letters or emails) on our work but with no specific ask for more financial support

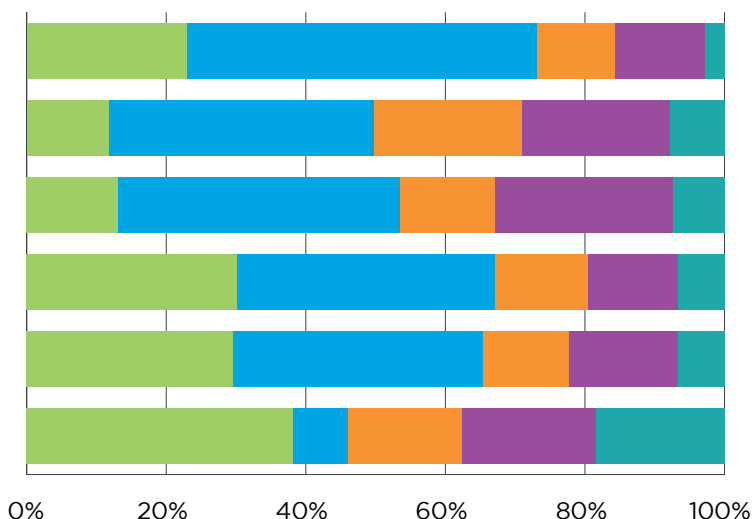
We ask our donors which areas of our work or cause they are particularly interested in

We send individual communications to them when we have something we think they will find particularly relevant or interesting

We give supporters the ability to immediately feedback when we contact them

We encourage supporters to get in touch with us to share views and experiences through all of our communications with them

We have a Supporter Charter (or Supporter Promise or equivalent)



■ We always do this or have this permanently in place
 ■ We often do or have done this
 ■ We definitely plan to do this or put this in place
 ■ We would/are considering doing this but haven't done it yet
 ■ We don't do this and don't have any plans to

Small charities

Answered by 32 respondents

We send some communications (letters or emails) on our work but with no specific ask for more financial support

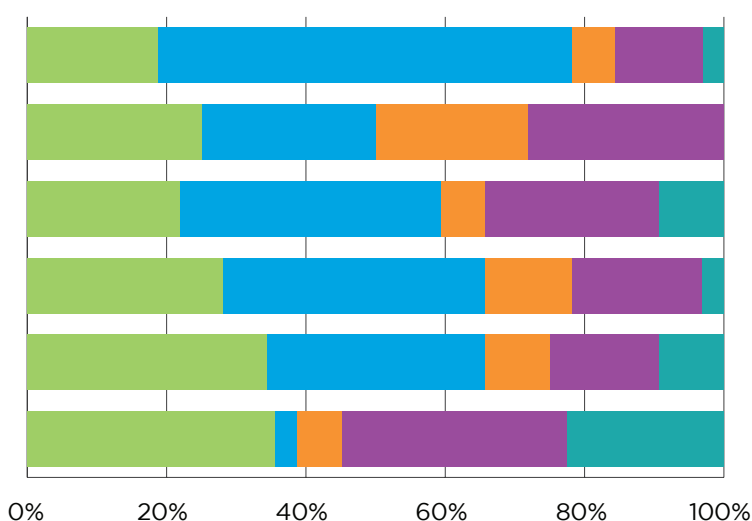
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Medium charities

Answered by 93 respondents

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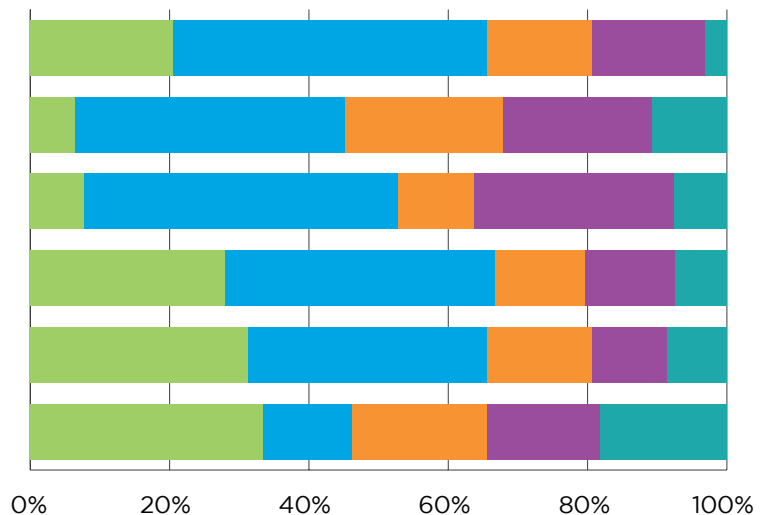
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Large charities

Answered by 53 respondents

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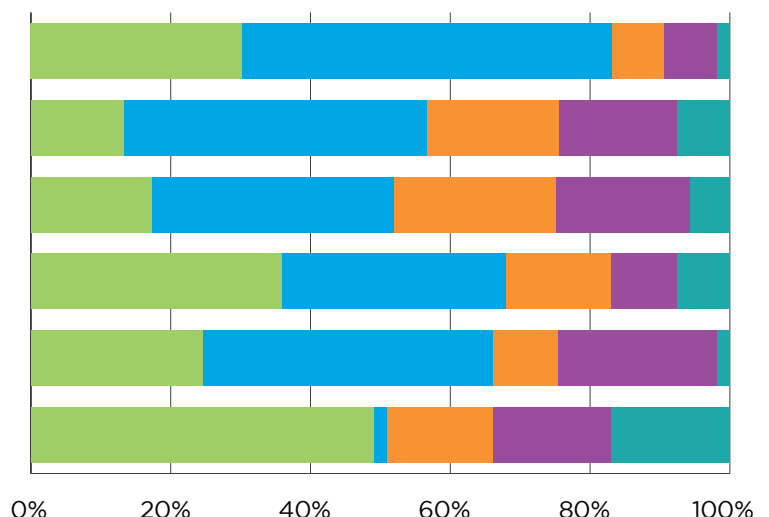
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Improving the donor experience

When asked what actions they have taken to review and improve their donor experience, 72% of respondents had already taken some action or put in place permanent systems.

The most common practice is to recognise and showcase their donors (in an Annual Report for example), which is being done by 65% of respondents.

Sharing feedback from supporters with staff was also a popular action, a practice done by 72% of small charities, 60% medium and 58% large.

The initiative that charities said they would definitely plan to do or consider is offering training to all staff on what they need to do to give donors a great experience, with almost half (47%) thinking about this.

The practice that is least used in the sector is using a donor panel that advises on fundraising and communications – however it's also an initiative that many organisations are thinking about, with 43% saying they are thinking about or have definite plans to introduce these.

In terms of reviewing and measuring information on the donor experience, the majority – 79% – report on information on complaints. This can run alongside the other methods, such as seeking input and feedback from key supporters to share their views on their experience. This is done by 62% of respondents.

Only 28% of respondents said they include information on their donor experience as a regular part of their reporting to the Board of Trustees – a figure which we hope to see rise in the future as more organisations review the donor experience and put in place the plans they have set.

All respondents

Answered by 179 respondents

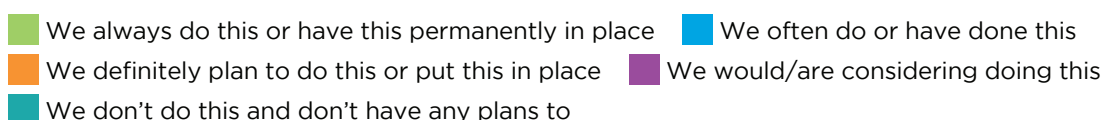
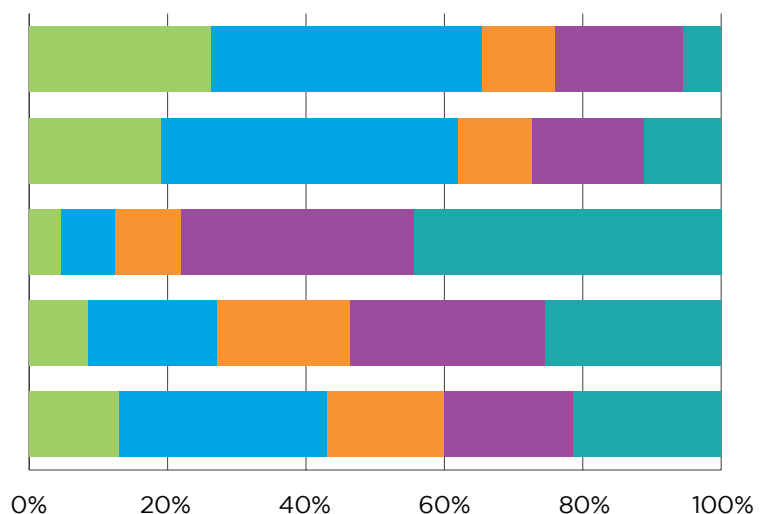
We have a way of recognising and showcasing our donors (e.g. in our Annual Report, online etc)

We share feedback from supporters with all staff

We have a donor panel that advises us on our fundraising and communications

We offer training to all staff on what we need to do to give donors a great experience

We have invested in new technologies or systems to help us improve the donor experience



Small charities

Answered by 32 respondents

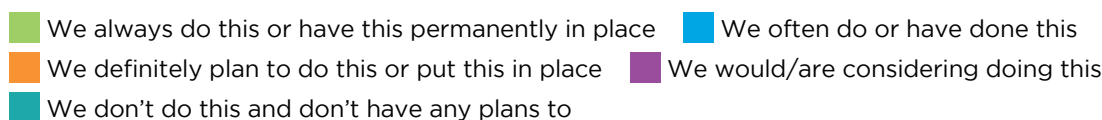
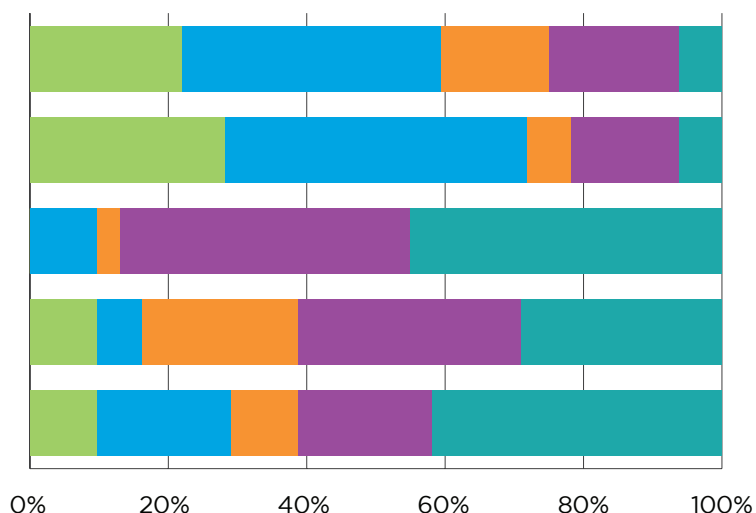
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Answered by 93 respondents

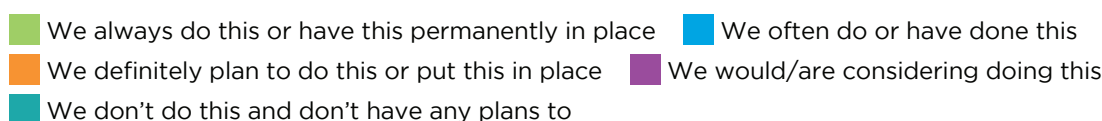
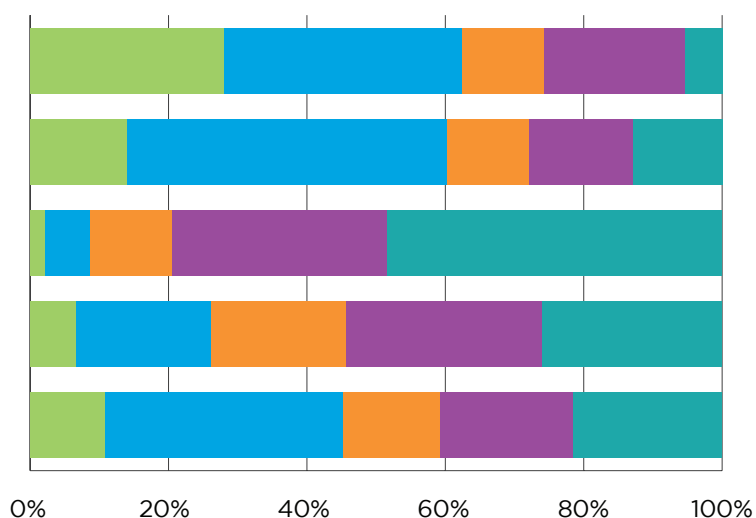
We have a way of recognising and showcasing our donors (e.g. in our Annual Report, online etc)

We share feedback from supporters with all staff

We have a donor panel that advises us on our fundraising and communications

We offer training to all staff on what we need to do to give donors a great experience

We have invested in new technologies or systems to help us improve the donor experience



Large charities

Answered by 53 respondents

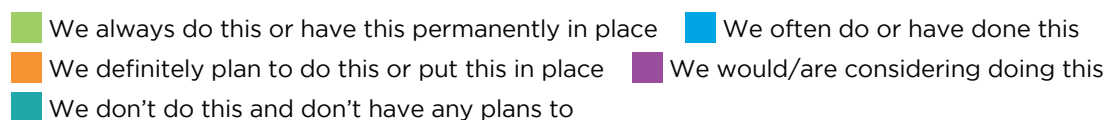
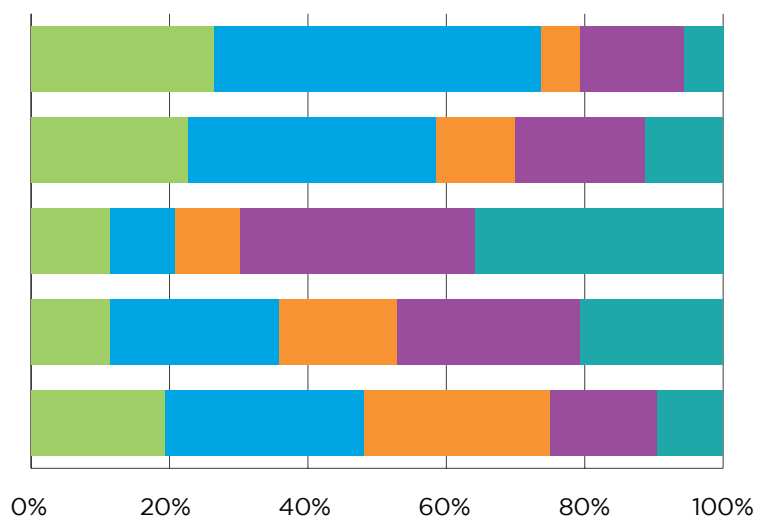
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We have invested in new technologies or systems to help us improve the donor experience



“We’ve conducted a full fundraising practice policy review over the last year, specifically with improving donor experience in mind. We’re now implementing the identified changes and have an ongoing process in place to work towards this goal”



IMPROVING THE DONOR EXPERIENCE: INNOVISTA



Innovista

**Robin Peake,
Development Manager**

Innovista are a Christian charity who train leaders to run churches and community projects across Europe, Russia and Central Asia. As a small charity, retention has always been an important part of our fundraising strategy because we've lacked the funds and expertise to invest in acquisition. Yet we've also found that being small has its advantages.

The Culture

To improve the donor experience, we re-structured processes so that it is the fundraising team, not the finance team, who first know of donations that arrive, so donors are thanked before their cheques are cashed. Mail-merged thank you letters are discarded in favour of handwritten (and non-branded) thank you cards which are delivered speedily (our record is 2 hours from an online donation to a card hand-delivered to a local donor).

The team has embraced this culture. The Oxford office have hand-written Christmas cards and baked personalised cakes for donors. Our overseas team have been involved too, epitomised by the time when one of our Ukrainian team, when he heard that his cousin was flying to Calgary in Canada, took the initiative to give his cousin some local delicacies to hand-deliver to a donor who lived there.

By building a culture that values our existing donors, we've found that they've decided to stick with us. Of 272 individual donors who gave in 2016, 215 gave again in 2017 (a retention rate of 79%). Retention of Trusts was 87%.

The Idea

Like any charity, we know that if our supporters don't give, we can't achieve our mission. Conversely, when they give loyally and in increasing numbers, more impact happens. That was certainly true in 2017, when we saw more money donated (£617k) and more leaders trained (1,242) than in any other year in our history.

It was our Chief Executive who proposed the idea of sending a thank you video to those who had given to make this possible. We decided to create personalised videos for our most loyal supporters – Trusts, Major Donors, non-programme specific regular supporters, and a few key new donors. The video was to let supporters know how many leaders they had provided training for and thank them for playing their key part in this.

The Process

Skypes were held with Anatoliy, our Field Director in Ukraine, and one of his team, Irene, to get buy-in. A script was produced for a 30-second video (any longer, and the file would be too big to send by email). 88 names were identified from our CRM, and the donors' first names (and phonetic spelling for Welsh names like Hywel!) were sent to the team in Ukraine.

Anatoliy made 88 unique videos, each with a different greeting addressing the donors by name at the start of the video. There was no topping and tailing: clips were all delivered in one-take so that the donor knew that this was made just for them. Filming (by Irene on her smartphone) took 9 hours in total, including breaks when Anatoliy's throat got sore.

The Chief Executive, Development Manager, and Trusts Fundraiser then sent out the videos to their assigned contacts from the list, usually as an email attachment with a short note, but sometimes via WhatsApp where we had had previous contact with donors via mobile.

The Response

This was a pure thank you piece, with no ask for a response. Yet 23% (20/88) of donors responded – some with short acknowledgements of gratitude, and others with longer emails, such as:

From Chris, who gives £40 a month: *“This is brilliant and brought tears to my eyes! It's easy to set up a standing order and then to forget that there are people at the other end of the transaction.”*

From Sue, who's been giving non-stop to Innovista for 15 years: *“Great to see Anatoliy in person and to hear those stats. You guys at Innovista are just the best at making your supporters feel valued.”*

CHALLENGES AND WHAT CAN BE IMPROVED

What are the challenges?

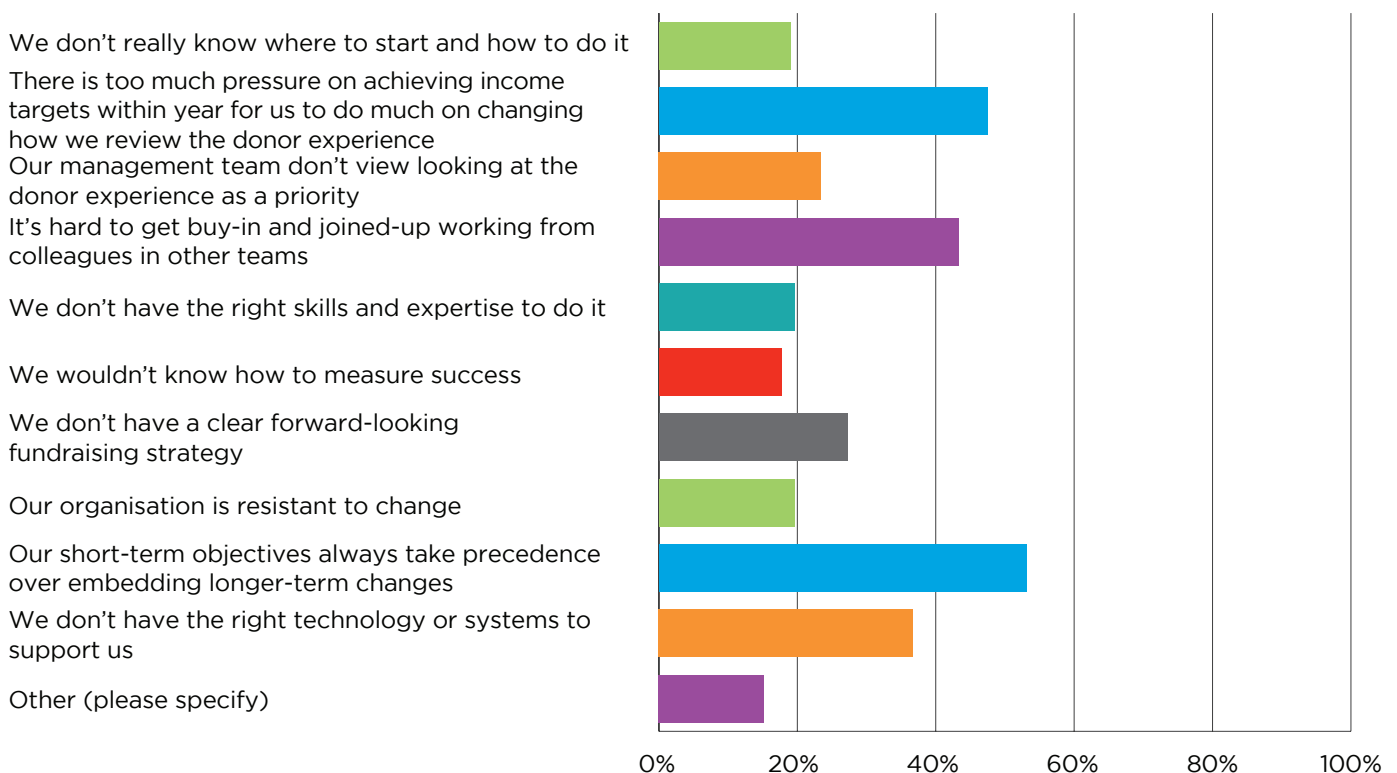
Many organisations find it difficult to take time away from regular operations to review their donor experience:

- 47% of charities said that the pressure to achieve income targets do not allow them to review their donor experience
- 68% believe the money raised is the primary concern for their fundraising team – although this is more common with 56% of larger charities, compared with 28% of small charities.
- 53% say that the short-term objectives of the organisation always take precedence over embedding longer-term changes.

Some respondents commented that organisations don't plan in the long-term, stating "our trustees like to see immediate ROI" and report a "lack of time and resource" to tackle these challenges.

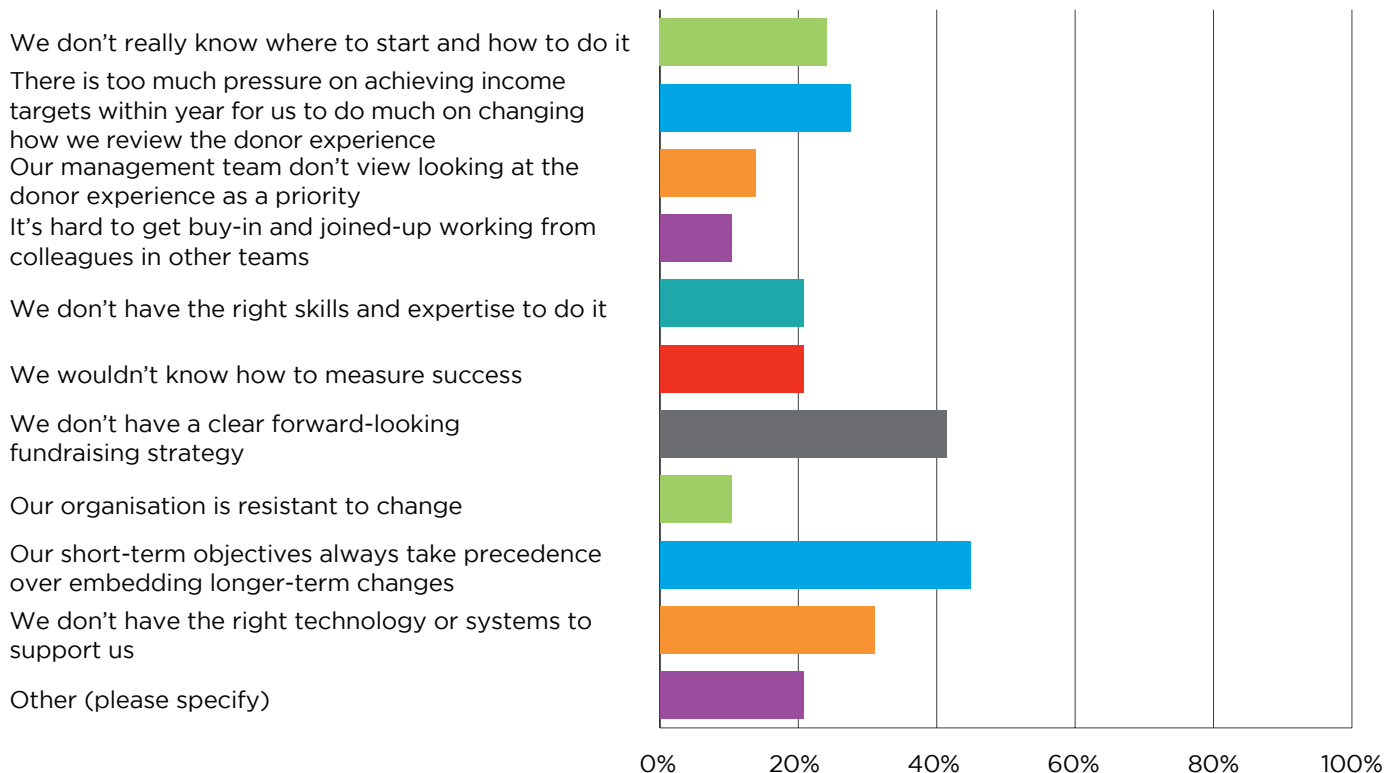
All respondents

Answered by 158 respondents



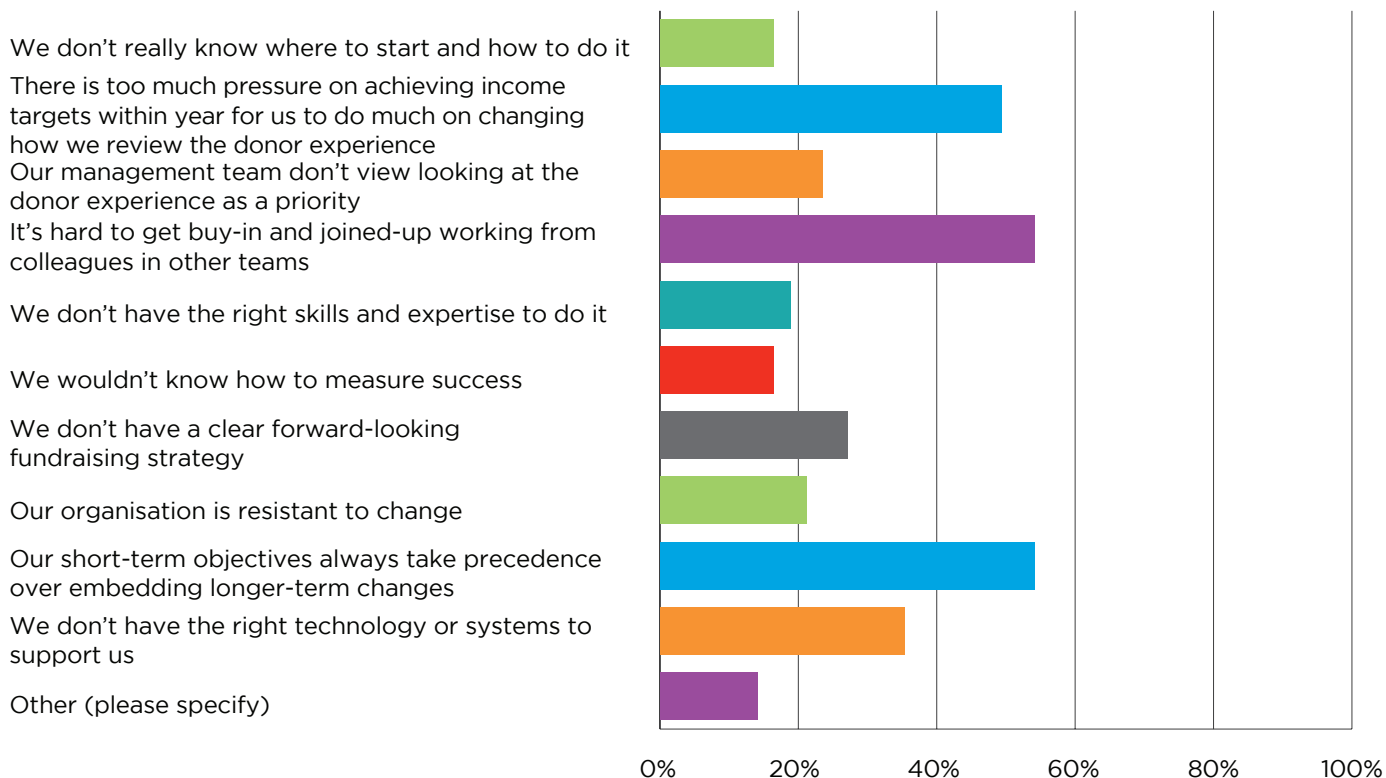
Small charities

Answered by 29 respondents



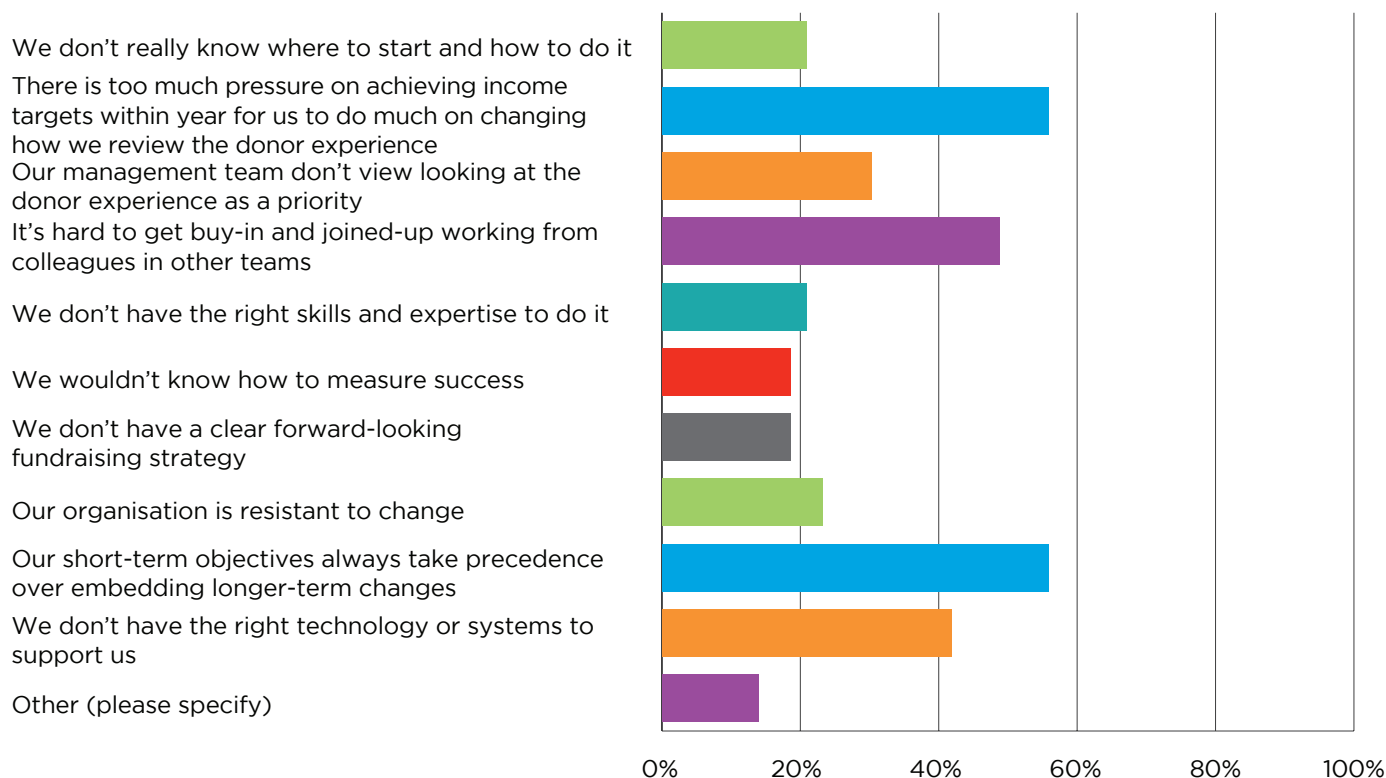
Medium charities

Answered by 85 respondents



Large charities

Answered by 43 respondents



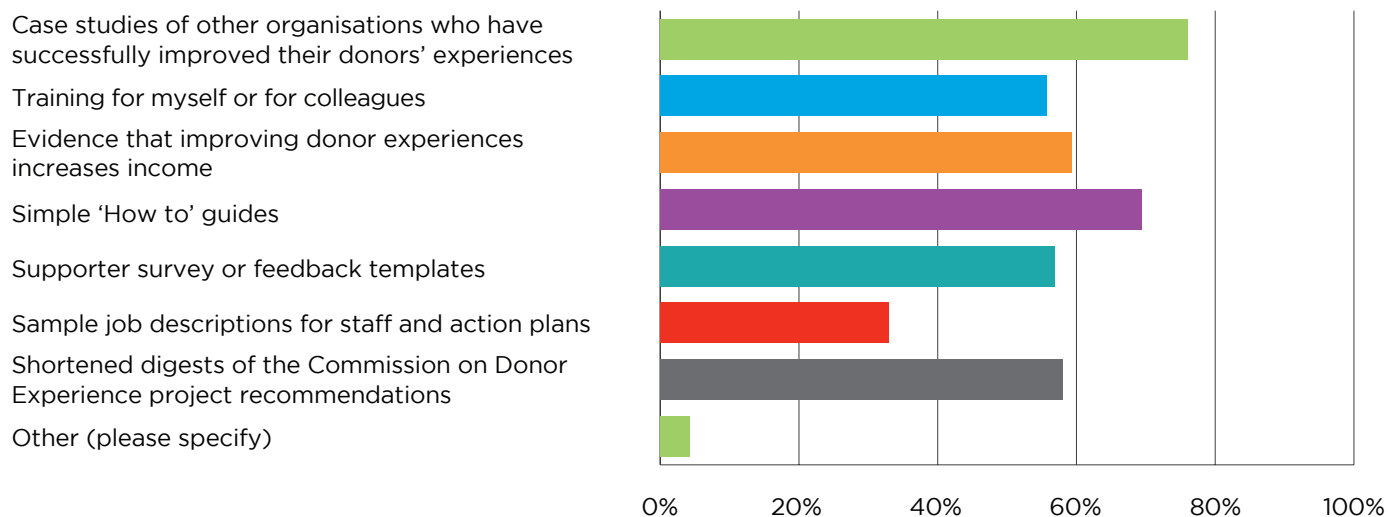
The need to raise awareness and inspire

19% of respondents said they wouldn't know where to start or how to review their donor experience and, interestingly, 52% could neither agree nor disagree if it was easy to implement the recommendations. However results show the need for guidance in several areas;

- 69% would like simple 'how to' guides.
- 28% said that they would or are considering offering training to all staff on what they need to do to give donors a great experience.
- 76% would like case studies of other organisations who have successfully improved their donors' experiences.
- 59% would like to see evidence that improving donor experiences increases income.
- 58% would like shortened digests of the Commission on Donor Experience project recommendations.

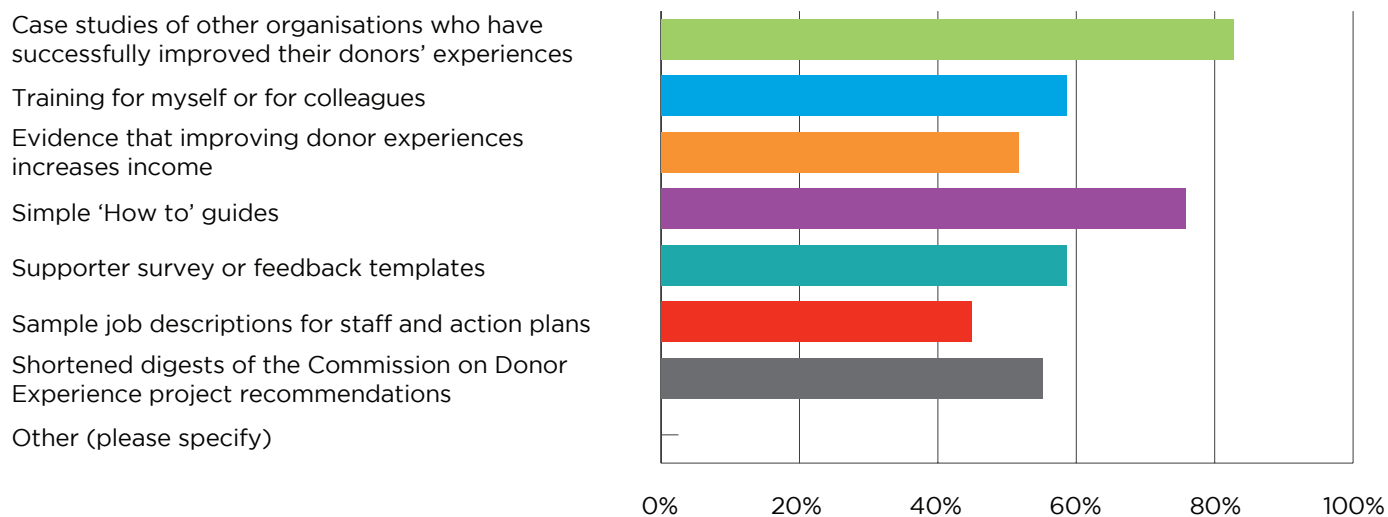
All respondents

Answered by 167 respondents



Small charities

Answered by 29 respondents



Medium charities

Answered by 90 respondents

Case studies of other organisations who have successfully improved their donors' experiences

Training for myself or for colleagues

Evidence that improving donor experiences increases income

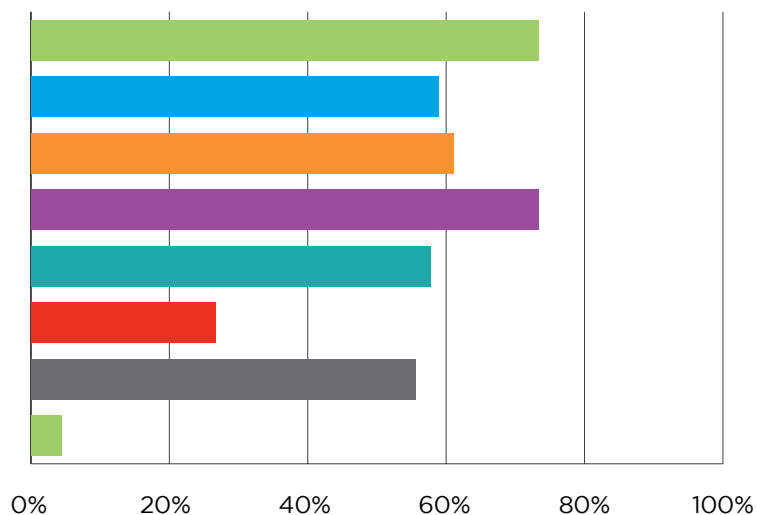
Simple 'How to' guides

Supporter survey or feedback templates

Sample job descriptions for staff and action plans

Shortened digests of the Commission on Donor Experience project recommendations

Other (please specify)



Large charities

Answered by 47 respondents

Case studies of other organisations who have successfully improved their donors' experiences

Training for myself or for colleagues

Evidence that improving donor experiences increases income

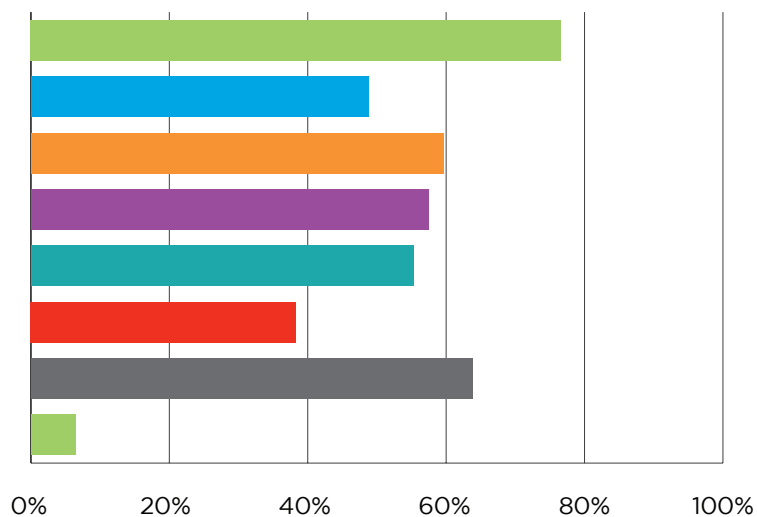
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IMPROVING THE DONOR EXPERIENCE

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