In partnership with

Institute of Fundraising

The Status of
UK Fundraising
2020 Benchmark Report
At a time when fundraisers rightly have a lot of focus on strategy and planning, research like this is more important than ever and I am delighted that the Chartered Institute of Fundraising has been able to work with Blackbaud again for the 2020 edition of Status of UK Fundraising. It gives us a read of the room, allows us to see how different organisations have responded during the coronavirus pandemic, and what learnings fundraisers can take back to their own organisations to help inform the decisions that are taken forward.

Throughout the current crisis, I have been blown away by the creativity, resilience, and innovation that fundraisers have shown every day. This is reflected in the research, with fundraisers that didn’t shy away from trying new and different activity now being more confident in their organisations ability to weather this storm. The number of fundraisers experimenting with types of virtual fundraising they hadn’t ventured into before, and finding success, is a testament to this.

Unsurprisingly, the pandemic is seen as the biggest challenge to overcome, but I am struck that the reasons given for managing to grow income remain the same as last year: having the right people with the right skills and being willing to innovate. This emphasises yet again that the expertise of fundraisers is our most import resource, and investing in, and valuing their talent is more important than ever.

But charities are not a monolith – some will have supporters that have been hit hard by this crisis, while others might have supporters who are both able and willing to give more. Fundraisers are concerned about the health, wellbeing and financial situations of their supporters, as well as how they can remain as relevant as possible to those they engage with – challenges that look set to continue with an uncertain economic situation stretching ahead of us. However, this empathy with supporters is a strength; it makes for better fundraising, stronger relationships, and has been vital to unlocking a wave of altruism with authentic and supporter-focused fundraising communication.

Peter Lewis
CEO Chartered Institute of Fundraising
The Status of UK Fundraising 2020 Benchmark Report was carried out by Blackbaud Europe together with the Institute of Fundraising. The data was collected in May and June 2020 via an online survey of 66 questions. A total of 1,990 respondents, up from 1,012 in 2019, completed the survey from a wide range of charity types and sizes.

- **51%** of respondents are from small charities (total income less than £1M), which is up by **21%** compared to 2019.
- **27%** from medium charities (between £1M – £10M) and **15%** are from large charities (income more than £10M).
- **43%** of respondents are fundraisers.
- **31%** are directors, CEOs or trustees.
- **28%** are managers.
- **33%** are junior.
- **19%** are consultants.
- **72%** are female.
- **28%** are male.
- **84%** of respondents are white, down from **92%** in 2019.
- **55%** of respondents have worked in the non-profit sector for 5 years or more.
- **14%** of respondents identified as minority ethnic, up from **8%** in 2019.
It’s fair to say that 2020 has been a year of exceptional circumstances and challenges, and it’s encouraging to see that overall people have a lot of trust and confidence in their organisations’ ability to respond to and recover from COVID-19.

- 66% of respondents said they were either fairly confident or very confident that their organisation will financially recover from COVID-19
- 24% told us they were very confident that their organisation would be able to adapt and use new ways of fundraising to combat the challenges of the pandemic

Despite this optimism, voluntary income growth slowed down this year across all types and sizes of non-profit organisations.

- 27% said their income had declined, up from 21% last year
- 24% said it remained the same, up from 16% last year
- 40% said their income had increased, down from 49% in 2019
- The two most common answers given for income growth remained the same as in 2019, these were undertaking planned new or different activity and hiring people with the right skills

Last year the top concern across the sector was that the UK’s economic situation may result in fewer donations. This continues to be a significant concern for organisations; however, this year’s pandemic is the biggest challenge organisations believe they will need to overcome.

- 66% believe that their organisation is coping well in response to COVID-19, however, 29% are not confident they will be able to continue post-lockdown
- 44% of respondents have reported an increase in online donations
- Over half (57%) of respondents believe the impact caused by the pandemic will last at least a year

Organisations have had to adapt their fundraising strategy to counteract the effects of the pandemic, with virtual fundraising being one of the main solutions tried across the sector to boost income.

- 44% of organisations were found to be willing to innovate and try new things
- 60% of respondents have done some form of virtual fundraising during the pandemic, with over three-quarters using it for the first time
- Overall, 64% found virtual fundraising to be a good way to attract new supporters

Where possible, the majority of people have been working from home. Despite the change in working environment, morale remains high and there has been a positive focus on employee training and development.

- 75% of respondents were working at home at the time of the survey
- Of those working from home, 73% were enjoying it and 67% would like to work from home more than they did previously when they can return to their offices
- 69% had done some form of training and development during lockdown
SECTION 02

Income
The survey found that despite the unprecedented circumstances presented by the COVID-19 pandemic, over a quarter of the sector were still generating fundraising income and able to raise more than anticipated.

Over the last 12 months, 27% of organisations managed to exceed their annual fundraising target which, during these difficult times, is positive to see. However, this is down 4% compared to last year and could be an early warning sign that expectations need to be reset for the year ahead with re-forecasts put in place.

Which best describes your organisation’s fundraising performance over the last full financial year?

The past year also saw a 5% rise in organisations without fundraising targets, with small non-profits organisations being the most likely to forgo them.

Which best describes your organisation’s fundraising performance over the last full financial year?

% Respondents by charity size

The Status of UK Fundraising 2020 Benchmark Report
When asked to think about the last full financial year, and how their organisation’s voluntary income changed compared to the year before, more organisations are reporting that their income has declined or stayed the same, and fewer organisations are saying their income has grown. **27%** of respondents reported a year on year decline (up from **21%** last year), **24%** said it remained the same (up from **16%** last year), and **40%** of organisations said it had increased, however, this was **9%** lower compared to 2019. This was consistent across all organisations, indicating that an organisation’s size was not the prominent factor behind the decline.

Respondents who reported income growth attributed the increase to the following three areas:

<table>
<thead>
<tr>
<th>1. TALENT:</th>
<th>Having enough of the right people with the right skills (61%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. INNOVATION:</td>
<td>Planning new and different activities (60%)</td>
</tr>
<tr>
<td>3. SUPPORT:</td>
<td>Overall increase in the number of donors (53%) and exceptional gifts (49%)</td>
</tr>
<tr>
<td>4. INVESTMENT:</td>
<td>We had the right level of investment in place (49%)</td>
</tr>
</tbody>
</table>

These findings are in line with the results we shared in last year’s report and may be helpful for decision-makers, such as CEOs, trustees or senior leaders, to use for benchmarking within their organisation and putting measures in place to encourage income growth.

**To what extent do you agree or disagree with the following statements:**
**all those who said that income had increased**

- **Income grew because we had enough people with the right skills**: 19% Disagree, 19% Neither agree nor disagree, 61% Agree
- **Income growth was planned based on new and different activity**: 23% Disagree, 17% Neither agree nor disagree, 60% Agree
- **Income grew because our overall donor numbers increased**: 28% Disagree, 19% Neither agree nor disagree, 53% Agree
- **Income increased because of exceptional gifts**: 35% Disagree, 15% Neither agree nor disagree, 49% Agree
- **Income grew because we have the right level of investment in place**: 25% Disagree, 26% Neither agree nor disagree, 49% Agree
- **Income from individual giving grew because existing supporters gave more this year**: 38% Disagree, 26% Neither agree nor disagree, 36% Agree
- **We benefitted from an increase in income due to the COVID-19**: 59% Disagree, 14% Neither agree nor disagree, 27% Agree
- **Income growth was a result of unplanned activity**: 57% Disagree, 17% Neither agree nor disagree, 26% Agree
- **Income growth was a function of luck rather than planned activity**: 61% Disagree, 18% Neither agree nor disagree, 22% Agree
Respondents who experienced income decline versus those who experienced income growth had clear, opposing outlooks. Those who had seen an overall increase in annual income were:

- more likely to be optimistic about the role of virtual fundraising
- open to embracing virtual fundraising, (they have the right tools and skills in place, and they think it’s a good way to attract new supporters)
- mindful of the potential negative impact that the pandemic could have on fundraising
- more cautious about committing to how long the impact of COVID-19 will last
- more likely to say that have not been reluctant to launch an appeal to supporters during the pandemic

Those who had seen an overall decline in income were:

- less likely to be optimistic about the role of virtual fundraising
- unlikely to believe that virtual fundraising would be a good fit for their organisation and the type of supporters they wish to attract
- of the mindset that COVID-19 would only have a short-term effect on the sector
- adamant that the pandemic was not going to have a direct impact on their abilities to raise funds
- Using platforms that were not either JustGiving or Blackbaud

To what extent do you agree or disagree with the following statements:
all those who said that income had decreased

<table>
<thead>
<tr>
<th>Statement</th>
<th>Disagree</th>
<th>Neither agree nor disagree</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>We did not have enough people with the right skills to grow income</td>
<td>34%</td>
<td>24%</td>
<td>42%</td>
</tr>
<tr>
<td>We saw a decrease in income due to the COVID-19 pandemic</td>
<td>34%</td>
<td>23%</td>
<td>42%</td>
</tr>
<tr>
<td>We were not resourced effectively to grow income</td>
<td>36%</td>
<td>26%</td>
<td>38%</td>
</tr>
<tr>
<td>2019 income was boosted by exceptional donations/unplanned activity</td>
<td>35%</td>
<td>28%</td>
<td>37%</td>
</tr>
<tr>
<td>Income declined because our existing supporters gave less</td>
<td>38%</td>
<td>28%</td>
<td>35%</td>
</tr>
<tr>
<td>Our fundraising plan did not include anything new or different</td>
<td>42%</td>
<td>24%</td>
<td>34%</td>
</tr>
<tr>
<td>Income declined because overall donor numbers decreased</td>
<td>40%</td>
<td>27%</td>
<td>33%</td>
</tr>
<tr>
<td>Income decline was the result of a lack of investment in new activity</td>
<td>41%</td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td>We were adversely impacted by negative press coverage</td>
<td>62%</td>
<td>23%</td>
<td>15%</td>
</tr>
</tbody>
</table>
Regardless of their organisation’s size, 70% of respondents believe that recovering from the impact of COVID-19 will be their biggest challenge over the next three years. This was closely followed by 69% having concerns that the economic situation will result in fewer donations, a sentiment that echoed the opinions shared in our 2019 survey. 55% also acknowledged that one of the main challenges in the year ahead will be adapting to new ways of fundraising.

What do you think are the main fundraising challenges the charity sector will face over the next 3 years (tick up to 5)?

% Respondents by charity size

- Recovering financially from the impact of the COVID-19 pandemic: 70%
- Economic situation leading to fewer donations: 69%
- Adapting to new ways of fundraising as a result of the COVID-19 pandemic: 55%
- Changing demand for services: 30%
- Communicating the cause in relevant ways: 29%
- Keeping up with the pace of technology change: 27%
- Charities having the right tools and systems for fundraising: 26%
- Public perceptions of the sector: 22%
- Charities having the right skills for fundraising: 18%
- Retaining and recruiting fundraising talent: 17%
- Rising costs of fundraising: 16%
- Other: 3%
Respondents are generally positive about their organisation’s capabilities in handling any upcoming challenges, sharing that they have either equal or higher confidence in their organisation compared to the overall sector. 69% believed that their organisation will recover from COVID-19, whereas only 59% believed this of the sector. This potentially demonstrates a great opportunity for organisations to share ideas and best practice with their peers, so the wider community can benefit from the advice of those who have put measures in place that are helping them survive and thrive in response to COVID-19.

**Mean score for: How confident are you that the charity sector/your organisation will respond effectively to these challenges?**

[1=not at all confident, 2=slightly confident, 3=fairly confident, 4= very confident]  
n=974

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Charity Sector</th>
<th>Organisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recovering financially from the impact of the COVID-19 pandemic</td>
<td>2.38</td>
<td>2.77</td>
</tr>
<tr>
<td>Economic situation leading to fewer donations</td>
<td></td>
<td>2.20</td>
</tr>
<tr>
<td>Adapting to new ways of fundraising as a result of the COVID-19 pandemic</td>
<td></td>
<td>2.91</td>
</tr>
<tr>
<td>Changing demand for services</td>
<td>2.68</td>
<td>2.83</td>
</tr>
<tr>
<td>Communicating the cause in relevant ways</td>
<td>2.71</td>
<td>2.86</td>
</tr>
<tr>
<td>Keeping up with the pace of technology change</td>
<td>2.37</td>
<td>2.50</td>
</tr>
<tr>
<td>Charities having the right tools and systems for fundraising</td>
<td>2.35</td>
<td>2.52</td>
</tr>
<tr>
<td>Public perceptions of the sector</td>
<td>2.36</td>
<td>2.65</td>
</tr>
<tr>
<td>Charities having the right skills for fundraising</td>
<td>2.36</td>
<td>2.37</td>
</tr>
<tr>
<td>Retaining and recruiting fundraising talent</td>
<td>2.25</td>
<td>2.27</td>
</tr>
<tr>
<td>Rising costs of fundraising</td>
<td>2.34</td>
<td>2.28</td>
</tr>
</tbody>
</table>
Given that vast swathes of fundraising activity have not been able to take place since March, it is not surprising that fewer organisations would report income growth this year. However, the extensive effect of COVID-19 on financials will only be fully reflected in future research where we can take a longer view. Unsurprisingly the challenge that COVID-19 presents for charities and the associated economic cost are front-and-centre of people’s minds when thinking about the years to come.
Sector Impact – COVID-19
The first cases of COVID-19 in the UK were detected in January 2020, with the Government gradually announcing an increase in public health and safety measurements before officially initiating a countrywide lockdown and social distancing regulations in England on the 23rd March 2020. Over half of the survey respondents said that the new measures had meant their organisation had to cancel or postpone planned events.

65% believe that the social distancing measures will lead to an overall decrease in donations from events and challenges, with a further 56% predicting that their event income will be impacted long-term.

However, whilst social distancing is in place 44% of respondents anticipate that they will experience a positive increase in online donations.

How do you expect income from these sources to change for your organisation while social distancing measures remain in place
% Respondents
n=1177

- Online donations (direct and indirect): 17% decrease, 26% no significant change, 13% increase, 1% don’t know
- Direct donations (cash or online): 32% decrease, 25% increase, 12% don’t know
- Direct Debit or standing orders: 21% decrease, 43% increase, 14% don’t know
- Donations from events/challenges: 12% decrease, 27% increase, 14% don’t know
- Legacy/In memoriam donations: 16% decrease, 21% increase, 14% don’t know
Although some organisations are still unsure how COVID-19 will affect their overall income, the general feeling across the sector is that it will have a negative impact. 62% of survey respondents anticipate that the pandemic will have a negative impact on their ability to raise income, with only 17% believing it will have a positive impact.

There was also a small minority of respondents (8%) who don’t currently know how their income will be affected, which is understandable as full lockdown regulations were still in place across the UK at the time of the survey.

**How do you expect the COVID-19 pandemic to affect your charity’s ability to raise income**

<table>
<thead>
<tr>
<th>% Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>n=1177</td>
</tr>
</tbody>
</table>

- It will have a negative impact on our ability to raise income: 62%
- It will have no impact on our ability to raise income: 13%
- It will have a positive impact on our ability to raise income: 17%
- I don’t know: 8%

One area that respondents agreed on was how long any impact caused by COVID-19 would have on the non-profit sector. Over half of respondents (57%) said the impact would last at least a year, with 19% of those believing the impact across the sector could last more than two years.

A minority 5% of respondents think that the sector will recover from the pandemic in under three months.

**How long do you expect the impact caused by the COVID-19 pandemic on the sector to last?**

<table>
<thead>
<tr>
<th>% Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>n=1399</td>
</tr>
</tbody>
</table>

- It’s too early to say: 19%
- More than 2 years: 19%
- More than 18 months but no more than 2 years: 19%
- More than 1 year but no more than 18 months: 16%
- More than 6 months but no more than 1 year: 22%
- More than 3 months but no more than 6 months: 14%
- 3 months or less: 7%
Most respondents anticipate that COVID-19 will affect their ability to deliver services, with a third of people saying that services are their current key priority. In addition to services, 32% have a focus on raising money.

What would you say is your organisation’s single biggest priority right now?

- Service delivery: 31%
- Raising money: 32%
- Planning/Strategy: 7%
- Adapting to post-COVID-19 world: 9%
- Other: 21%

It’s encouraging to see that almost half of organisations have not been reluctant to launch an appeal to their supporters during the COVID-19 pandemic, however, 36% said that they were reluctant to actively appeal for funds due to concerns over their supporter’s health and economic wellbeing.

Have you or your organisation been reluctant to appeal to your supporters for funds during the pandemic?

- Yes: 36%
- No: 49%
- Not Sure: 15%
Which of these reasons explain your reluctance

Concerned about the economic impact on our supporters | 61%
Concerned about the health and wellbeing of our supporters | 40%
Our cause is not directly related to the pandemic | 38%
Other charities are more deserving than us at this particular time | 28%
We don’t have enough staff | 19%
We don’t have budget available | 14%
We had recently contacted our supporter base with an unrelated appeal | 13%
Other (please specify) | 13%

The harsh reality of COVID-19’s impact is that 29% are not confident their organisation will survive and about a third agree that to survive they will have to cut service delivery and/or make redundancies.

To what extent do you agree or disagree with the following statements:

As an organisation we are coping well with this crisis | 15% 18% 66%
To survive beyond the pandemic we will have to make significant cuts to service delivery | 46% 22% 32%
To survive beyond the pandemic we will have to reduce our headcount by making redundancies | 46% 23% 31%
I am not confident that my charity will be able to survive the impact of the pandemic | 56% 15% 29%
I think the pandemic could force us to merge with another charity | 65% 17% 18%
That said, 60% believe that their organisation has been coping well overall. Over half shared that their organisation had revised its strategy and decided to try new approaches, demonstrating the sector’s ability to adapt to a changing world.

65% were still maintaining their original fundraising budget and only 3% of respondents had been furloughed due to the pandemic. The number of those furloughed does appear low in comparison to reports in sector press about the number of non-profit professionals being furloughed, but this could indicate that fundraising teams have been the least affected. Of course it could simply be that those on furlough did not have access to their work email at the time of this survey being distributed so did not take part in the survey.

**To what extent do you agree or disagree with the following statements:**

* n=1346

<table>
<thead>
<tr>
<th>Statement</th>
<th>Disagree</th>
<th>Neither agree nor disagree</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>We have systems and processes in place to allow effective home working</td>
<td>17%</td>
<td>12%</td>
<td>71%</td>
</tr>
<tr>
<td>We will have to revise our fundraising strategy so that it is fit for purpose post-lockdown</td>
<td>17%</td>
<td>18%</td>
<td>65%</td>
</tr>
<tr>
<td>Fundraisers have been encouraged to try new and different fundraising approaches during the pandemic</td>
<td>21%</td>
<td>21%</td>
<td>59%</td>
</tr>
<tr>
<td>During the lockdown we are taking full advantage of digital opportunities</td>
<td>23%</td>
<td>20%</td>
<td>57%</td>
</tr>
<tr>
<td>During the pandemic investment in fundraising remains a priority for my organisation</td>
<td>25%</td>
<td>23%</td>
<td>52%</td>
</tr>
<tr>
<td>Fundraising teams continue to be well supported by other teams across the organisation</td>
<td>23%</td>
<td>31%</td>
<td>46%</td>
</tr>
<tr>
<td>The pandemic will change the way we engage with our supporters for the better</td>
<td>18%</td>
<td>36%</td>
<td>46%</td>
</tr>
<tr>
<td>Our fundraising budget has been reduced</td>
<td>33%</td>
<td>31%</td>
<td>35%</td>
</tr>
</tbody>
</table>
It’s unsurprising to see so many respondents expressing concern about their supporters’ health and economic wellbeing – we work in a highly empathetic and caring sector. Research from JustGiving shows, however, that there has also been an increase in donations to appeals launched by charities (particularly those relating to COVID-19). At a time when many feel powerless and unsure how to help their community and wider society, it could be that giving to non-profits provides people with some sense of purpose and control. This indicates people are ready and willing to give if presented with the right ‘ask’.
The research revealed there are three types of organisations with distinct mindsets and approaches in their response to COVID-19.

1. **Well supported, digital fundraisers**: This group says that fundraising teams are well supported and that they are taking full advantage of digital opportunities. These organisations are more likely to have seen income growth last year, they come from organisations that are very willing to innovate, they have the tools and skills in place for digital fundraising and they believe it is the future.

2. **Adaptors**: This group says that the pandemic will result in better (and different) supporter engagement and that strategy will need to be changed. This group say their organisation is unwilling to innovate (although they have tried virtual fundraising during the pandemic), they are more likely to say that virtual fundraising is not right for them and to say they don’t have the tools or skills in place for virtual fundraising.

3. **Financially limited**: this group says that their budgets have been cut. This group are more likely to lack confidence in their organisation’s survival, to be reluctant to appeal for funds, to say that virtual fundraising is not right for them and to disagree that virtual fundraising is the future.

<table>
<thead>
<tr>
<th>Group 1: Well supported digital fundraisers</th>
<th>Group 2: Adaptors</th>
<th>Group 3: Financially limited</th>
</tr>
</thead>
<tbody>
<tr>
<td>More likely to see income growth last year</td>
<td>More likely to agree that ‘as an organisation we are coping well with this crisis’</td>
<td>More likely to disagree (strongly) that ‘as an organisation we are coping well with this crisis’</td>
</tr>
<tr>
<td>More likely to agree (strongly) that ‘as an organisation we are coping well with this crisis’</td>
<td>More likely to say that their organisation is unwilling to try new things</td>
<td>More likely to say they have been reluctant to ask for funds</td>
</tr>
<tr>
<td>More likely to say their organisation is willing (very) to try new things</td>
<td>Have tried at least one VF method for the first time during the pandemic</td>
<td>More likely to say that their organisation is unwilling (very) to try new things</td>
</tr>
<tr>
<td>Are familiar with VF methods</td>
<td>Strongly disagree: we have the skills/tools in place to run a VF campaign</td>
<td>Strongly disagree: VF is the future of fundraising</td>
</tr>
<tr>
<td>Strongly agree: we have the skills/tools in place to run a VF campaign &amp; VF is the future of fundraising</td>
<td>Strongly agree: Virtual fundraising is not right for our charity</td>
<td>Agree: virtual fundraising is not right for our charity</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Agree: I am not confident that my charity will be able to survive</td>
</tr>
</tbody>
</table>

It’s important to note that the size of an organisation had no influence on the groupings, which suggests the mindset and culture of an organisation will have the greatest impact on their ability to adapt and continue to raise money, despite the challenges presented by the COVID-19 pandemic.
Many of us have had to change our practices and fundraising plans and dig deep for creativity that simply wasn’t there amongst the worry, thoughts of the future and constant refreshing of the news. Our supporters are just as worried with thoughts of the future as we are and with the ever-changing environment, we’ve had to change our communications and offerings.

As with many other charities, we’ve lost significant income but I’m confident things will improve – they’re already improving slowly. Our supporters are still there and have made it clear they’ve still got our back, new supporters are still coming through on virtual challenges, even physical challenges – we’ve had no shortage of enquiries about future events. I have no doubt community and events fundraising will recover.
SECTION 04

Virtual Fundraising
The fundraising landscape has completely changed over the past few months in response to COVID-19, and there’s been an unstoppable determination by many organisations to adapt and carry on fundraising, despite the current circumstances that we’re all living and working in.

76% of organisations have used at least one virtual fundraising initiative for the first-time during lockdown. And the good news is that the majority say they will use it again as it’s been a good way to attract new supporters, as well as engage existing ones.

How likely are you to use these fundraising methods again in the future?
% who have used virtual fundraising during the pandemic

<table>
<thead>
<tr>
<th>Method</th>
<th>Likely</th>
<th>Unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>Give as you shop n=253</td>
<td>97%</td>
<td>1%</td>
</tr>
<tr>
<td>Online giving directly through social media n=370</td>
<td>94%</td>
<td>2%</td>
</tr>
<tr>
<td>Team virtual events n=173</td>
<td>84%</td>
<td>2%</td>
</tr>
<tr>
<td>Online video game streaming n=41</td>
<td>83%</td>
<td>7%</td>
</tr>
<tr>
<td>Virtual physical challenges using a fitness app n=190</td>
<td>82%</td>
<td>3%</td>
</tr>
<tr>
<td>Crowdfunding n=82</td>
<td>80%</td>
<td>1%</td>
</tr>
<tr>
<td>Online streaming of quizzes, performances etc. n=199</td>
<td>73%</td>
<td>4%</td>
</tr>
<tr>
<td>Online streaming of exercise classes n=62</td>
<td>64%</td>
<td>7%</td>
</tr>
</tbody>
</table>

n=variable (see axis labels)
Therefore, it’s unsurprising that of those who have tried virtual fundraising during lockdown, 83% say their organisation is willing to try new or innovative ideas.

**How willing is your organisation to innovate or try new things?**

<table>
<thead>
<tr>
<th>% Respondents</th>
<th>n=953</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very willing</td>
<td>44%</td>
</tr>
<tr>
<td>Willing</td>
<td>39%</td>
</tr>
<tr>
<td>Neither willing nor unwilling</td>
<td>11%</td>
</tr>
<tr>
<td>Unwilling</td>
<td>5%</td>
</tr>
<tr>
<td>Very unwilling</td>
<td>1%</td>
</tr>
</tbody>
</table>

**Which of these methods of fundraising have you used to raise income during the pandemic?**

- Online giving directly through social media: 66%
- Give as you shop: 45%
- Online streaming of quizzes, performances etc.: 35%
- Virtual physical challenges using a fitness app: 34%
- Team virtual events: 31%
- Crowdfunding: 15%
- Online streaming of exercise classes: 11%
- Online video game streaming: 7%
- QR codes: 3%
- Other virtual fundraising (please specify): 18%
Across the board, 53% have tried some form of online video streaming to raise funds during the pandemic – including pub quizzes, exercise classes, and video gaming. 65% have tried a virtual physical challenge using a fitness app, such as Strava, or launched a team virtual event.

Medium sized, growing organisations have been the most likely to have engaged with some form of virtual fundraising. At 36%, small organisations were shown to be the least likely to try virtual fundraising citing the main reasons being either a lack of resources or tools.

Have you done any virtual fundraising during the pandemic?

<table>
<thead>
<tr>
<th></th>
<th>Small (&lt;£1M)</th>
<th>Medium (£1M to £10M)</th>
<th>Large (&gt;£10M)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>58%</td>
<td>68%</td>
<td>61%</td>
</tr>
<tr>
<td>No</td>
<td>36%</td>
<td>26%</td>
<td>25%</td>
</tr>
</tbody>
</table>

n=941
We know that once a charity has tried some form of virtual fundraising, they see the potential for their organisation. We’ve been working closely with small charities to build confidence and help them adapt their fundraising, so they don’t miss out on donations. Our new #SmallCharityChat service is available every Wednesday for small charities that want to book a call with a JustGiving digital fundraising expert.
SECTION 05

Working from Home
Prior to the pandemic, 24% of respondents had never worked from home in their current role. However, three-quarters of respondents have been working from home during lockdown with 86% feeling that they have been managing to do so effectively. Nearly the same amount again shared that their team had been working cohesively whilst apart.

To what extent do you agree or disagree with the following statements:

all those who are working from home

<table>
<thead>
<tr>
<th>Statement</th>
<th>Disagree</th>
<th>Neither</th>
<th>Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am able to work from home effectively</td>
<td>6%</td>
<td>8%</td>
<td>86%</td>
</tr>
<tr>
<td>We are working well as a team during lockdown</td>
<td>5%</td>
<td>10%</td>
<td>85%</td>
</tr>
<tr>
<td>I have the hardware necessary to do my job effectively</td>
<td>7%</td>
<td>6%</td>
<td>85%</td>
</tr>
<tr>
<td>I have good access to digital tools that enable me to do my job</td>
<td>5%</td>
<td>10%</td>
<td>85%</td>
</tr>
<tr>
<td>My org has cloud based tech so I can access all systems from home</td>
<td>12%</td>
<td>8%</td>
<td>80%</td>
</tr>
<tr>
<td>Despite the circumstances, I enjoy working from home</td>
<td>12%</td>
<td>15%</td>
<td>73%</td>
</tr>
<tr>
<td>After lockdown I would like to work from home more often than I did before</td>
<td>15%</td>
<td>18%</td>
<td>67%</td>
</tr>
<tr>
<td>Internet connection issues disrupt my work</td>
<td>54%</td>
<td>15%</td>
<td>32%</td>
</tr>
</tbody>
</table>

THE STATUS OF UK FUNDRAISING 2020 BENCHMARK REPORT
80% told us that their organisation used cloud-based technology in order to allow them access to all their required systems from home. Out of those who took the survey, 73% were either a Blackbaud or JustGiving customer, with nearly three-quarters of those who used Blackbaud’s cloud-based solutions feeling that they could use them just as effectively at home as when in the office. This compares to only 59% of those who used alternative CRM providers.

Participation in training and development during lockdown has remained high (69%). The most popular mediums of learning have been webinars, which have seen a 63% rise in use, and videos.

Overall, 67% of respondents would like to continue working from home more often on a long-term basis.

Which of the following are you using to learn from while social distancing measures are in place?

<table>
<thead>
<tr>
<th>Medium</th>
<th>I do not use at all</th>
<th>Using more</th>
<th>About the same</th>
<th>Using less</th>
</tr>
</thead>
<tbody>
<tr>
<td>Webinars</td>
<td>12%</td>
<td>22%</td>
<td>19%</td>
<td>3%</td>
</tr>
<tr>
<td>Videos</td>
<td>4%</td>
<td>1%</td>
<td>25%</td>
<td>32%</td>
</tr>
<tr>
<td>Conferences</td>
<td>3%</td>
<td>24%</td>
<td>31%</td>
<td>20%</td>
</tr>
<tr>
<td>Infographics</td>
<td>3%</td>
<td>37%</td>
<td>30%</td>
<td>3%</td>
</tr>
<tr>
<td>Blogs</td>
<td>3%</td>
<td>25%</td>
<td>40%</td>
<td>16%</td>
</tr>
<tr>
<td>Longform content</td>
<td>5%</td>
<td>34%</td>
<td>43%</td>
<td>12%</td>
</tr>
</tbody>
</table>
With so many organisations now set up for working from different locations, communicating in new ways, and being attentive to employees’ mental health and wellbeing in a more structured way, we have seen what’s possible with flexible working practices. It would be great to see leaders taking these learnings forward as we move out of this crisis, and enshrining them in policy and practice to benefit workplace equality in the longer term.
Voice from the sector
Our experiences at Sue Ryder these past few months have closely echoed the more popular responses from the Status of UK Fundraising Report. In particular, this showed in our Emergency Appeal which not only raised income but also morale across the teams internally, giving us confidence for the future. Digital Fundraising came to the fore within the wider organisation, giving us an opportunity to embrace both this approach and new working practices in the months ahead.

But first, record scratch, to set the scene. We were feeling optimistic in January, a new fundraising leadership team was gelling, the final quarter was looking strong, our budget planning had been forensic, and we had ambitious plans for the upcoming year. Then in mid-March, the organisation moved quickly and decisively to adopt social-distancing measures a week before lockdown officially began. Events were cancelled, shops closed, and offices shut. Those final few staff kicked out decamped to a local pub garden and would have undoubtedly ordered another round with the benefit of hindsight.

We were early adopters of the furlough scheme making immediate savings to expenditure, whilst those remaining focused solely on the Emergency Appeal. This launched in early April with a push towards our website. The following day saw huge numbers of online donations for us, a 56% increase on our previous record. Our Digital Teams jumped at the opportunity for a digital-first campaign with a large-scale email programme backed by paid and organic social, all aimed at web and JustGiving campaign donations.

Fundraising teams across the country adapted to full-time working from home by embracing video calls and streamlining our sign off processes in order to move quickly. Pure digital activity was supported with targeted calls to encourage mid-value supporters online; tailored trust applications; and our PR Team block booking the CEO with appointments with Sky, ITV, and the BBC. We pushed the 2.6 challenge to mitigate losses through cancelled events, set up a virtual series, ran follow up PPE hand-raisers and finally, in a reverse to usual, we posted a DM mailing to supporters ineligible for the above. It performed well, but digital was undoubtedly the hero.

Our other key takeaway from the campaign was to focus on a consistent, simple ask. This was tailored to local care centres but unrestricted. Also, attention was on our nurses. We were fortunate, as highlighted in the report, that our cause resonates at this time. We improved our processes in order to act quickly, this included a test-and-learn approach which could adapt to the more successful asks. If there was ever a time for a bold ask, then this was it and the uncharacteristically urgent tone resonated with our supporters. The backing of our PR team was invaluable and proved an organisation-wide focus improved result.
The appeal performed amazingly well for us with income and return on investment outperforming any campaign in recent history. Our reforecasts have shown Sue Ryder urgently needs ongoing public support to continue operating its hospices and hospice at home services across the country beyond the summer, but we’re optimistic and keen to maintain this digital approach to ensure we do so as the economic effects of the pandemic continue.

If your organisation is making positive changes in response to COVID-19, we’d love to hear from you and share your story to help others in the sector. Email solutions@blackbaud.co.uk
Conclusion
Without a doubt, the sector is facing one of the most challenging times it has ever faced and it’s extremely worrying that a one-third of non-profit organisations are concerned for their survival.

Yet we know that two-thirds are maintaining their fundraising budgets and are confident their organisation will recover.

How can we help all organisations feel the same way and support them in coming successfully out the other side? And perhaps not just survive COVID-19 but thrive as result. At Blackbaud Europe, this report is just one way we’re helping the sector on that journey – shining a light on the tools used, mindset and culture of organisations adapting well in this changing world.

Thank you to everyone that contributed their voices to this report – with nearly 2,000 responses from professional fundraisers at organisations in all shape and sizes, this report is a fabulous resource for the sector to understand shared experiences and benchmark their performance.

Stay safe. Stay well.

Sally Falvey
Head of Corporate Marketing, Blackbaud Europe

P.S. Inertia really is the enemy right now, so if your organisation is struggling, please don’t suffer in silence. On the next page you will find a few key resources to help you connect with others in the sector. If there are more that deserve a mention, email solutions@blackbaud.co.uk and we’ll add them.
Useful Resources:

**Institute of Fundraising (IoF) Coronavirus Guidance**
institute-of-fundraising.org.uk/guidance/coronavirus/
Our friends at IoF have a dedicated hub packed with advice and information for those in the fundraising community looking for guidance in managing their response to COVID-19.

**Blackbaud COVID-19 resources** hub.blackbaud.co.uk/covid-19-resources
Tips, case studies and webinars to help your organisation adapt its fundraising in response to COVID-19, including our Virtual Fundraising 101 guide.

**Online forums, discussion groups and 1:1 advice:**

**Small Charity Chat** just.ly/small-charity-chat
Every Wednesday our colleagues at JustGiving are available to small charities wanting to chat all things digital fundraising. Book a call to get tips and advice on how to adapt your fundraising in response to COVID-19.

**Fundraising Chat** facebook.com/groups/FundraisingChat/
A Facebook group set up by fundraisers working in the sector. It’s a fantastic space for open, honest discussion and sharing resources.

**COVID 19 Charity Preparedness Group** facebook.com/groups/345239189766729/
Another Facebook group, but set-up specifically to support people in the sector in response to COVID-19.

**Digital Candle** digitalcandle.org.uk/
A free service for charities who want a one-hour call with a digital expert. Charities can get advice on any aspect of digital or digital marketing, from digital strategy and skills to Google Ads and social media. Digital marketing agency Platypus Digital kicked the project off, and it is now supported by Catalyst. It is jointly run by the two organisations.

**Fundraising Everywhere LinkedIn Group** linkedin.com/groups/8951100/
An online community from the team at Fundraising Everywhere who provide virtual training for fundraisers who want to connect and be inspired online.