Fundraising strategy

Fundraising *magazine*

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In this **guide...**

Editor's message

Stephen Cotterill

Welcome to the latest instalment of the How to Guide series produced by Civil Society and Fundraising Magazine. If you haven't downloaded the **How to Guide – Legacies** and **How to Guide – Next steps in fundraising**, I urge you to do so. They are both free and packed with useful information and expert insight curated from Fundraising Magazine and the Civil Society website.

Whether your organisation is a national giant or a smaller charity with limited resources, having a clear strategy when it comes to things such as campaigning, partnerships, digital transformation and branding is essential. This guide is designed to give you some steer on how to approach specific parts of your overall strategy and offers case studies of innovation and best practice. For example, WaterAid explains how its Where There's Water campaign was developed and produced by the communities impacted by the work of the charity, while People vs Profiteers tells how its Nando's Chicken is Killing our Rivers campaign drove awareness and funds by addressing the pollution caused by mass factory farming in the river Wye.

The features and case studies are followed by group activities and exercises to help you apply what you have learned to your own fundraising strategy.

Keep an eye out for future editions of the How to Guides which will focus on specific specialisms, offering a deep dive into areas such as trust and foundations, and corporate partnerships.

How to Guide
Fundraising strategy

Help steer your organisation's fundraising strategy with the third instalment of the How to Guide series produced by Civil Society and Fundraising Magazine

This third volume is one of several publications gathering expert insight and real-life case studies on a range of professional fundraising specialisms, including major donor giving, trust and foundation grant applications, legacies and many more.

This edition takes a broad look at fundraising strategy, highlighting best practice, successful approaches and common pitfalls to avoid.

How to Guide – Fundraising strategy includes:
- Insight into running a rapid-response campaign
- How to steward corporate partnerships
- Guidance on rebranding to grow your donor base
- How to change the storytelling narrative
- Navigating digital transformation

This edition includes case studies from:
- People vs Profiteers
- Arts for Dementia
- Liberty Human Rights
- Tree of Hope
- WaterAid

How to Guide – Fundraising strategy is one in a series of books packed with useful content curated from Fundraising Magazine and civilsociety.co.uk

Upcoming editions:
- Events fundraising
- Trusts and foundations
- Corporate partnerships
- Face-to-face fundraising
- New technology

Strategic moves to drive income

A well-crafted charity fundraising strategy is essential for the sustainability and growth of any not-for-profit organisation. **Stephen Cotterill** looks at examples of charities putting strategy into action

A fundraising strategy provides a clear roadmap to secure the financial resources needed to fulfil the charity's mission, support its programmes, and make a meaningful impact in the community. Without a strategy, fundraising efforts can become disorganised, reactive and ineffective, leading to missed opportunities and donor fatigue.

"A strong fundraising strategy encourages innovation and adaptability"

An effective strategy allows charities to identify their target audiences, choose the most appropriate fundraising methods, and set realistic goals. It also helps organisations diversify their income streams – reducing dependency on a single source – and enables better risk management. With clear planning, charities can allocate their resources more efficiently, engage donors more meaningfully, and build lasting relationships that foster trust and long-term support.

A strong fundraising strategy encourages innovation and adaptability.

In times of crisis or change – such as economic downturns or shifts in donor behaviour – organisations with a flexible strategy are better equipped to pivot and maintain stability.

As an introduction, here are some examples of charities that have recently launched strategies to drive income.

Hospice UK

National charity Hospice UK has unveiled refreshed branding and a five-year strategy. The charity, which represents more than 200 hospices in the UK, says it paid around £90,000 for the rebrand, strategy development, and rollout process.

It says its new logo, made up of a circle of Hs, represents the close-knit support provided by the UK's 200-plus hospices, while the colour palette symbolises the optimism and energy which drives the charity forward.

Hospice UK says the rebrand also reflects "the significantly different climate in which we're operating since we last refreshed our branding".

It is designed to give the UK's £1.6bn hospice sector, which is predominantly made up of independent local charities, "a cohesive and strong brand voice as end-of-life care is set to be in the spotlight more than ever".

Hospice UK says it consulted its hospice members, supporters and

partners extensively on its strategy and refreshed branding.

The membership body says its new branding and 2024-29 strategy comes at a time when the hospice sector is facing significant challenges, with rising demand for palliative care, mounting funding pressures and staff shortages.

Toby Porter, chief executive of Hospice UK, says: "Hospice UK's strategy shows how, with the right support, the hospice sector can step up to these challenges.

"Coupled with our bold new brand, we're ready to speak up for the sector and meet the challenges ahead."

"We hope this will help us inspire a new generation of supporters"

Barnardo's

Barnardo's has published a three-year strategy and rebrand, both of which have been co-created with children and young people.

The charity says increasing its income would be an important part of the new strategy, as well as measuring its impact. It decided to refresh its logo after a poll showed around 50% of children could not identify the charity or what it did.

Barnardo's says it hopes the new branding, which is designed to stand out in a digital age, will lead more people to donate and volunteer.

The charity, which recorded an income of £315m in the year to March 2023, spent £240,000 on the process of developing the new brand. This included £185,000 on an initial research phase, involving children and young people, which also fed into the development of its new strategy, and £55,000 on the creative delivery.

Barnardo's chief executive Lynn Perry says: "We hope this will help us inspire a new generation of supporters who share our commitment to changing childhoods and changing lives."

Perry adds that increasing income was an important part of the strategy. "Our new strategy is designed to help us respond and make sure we can continue to deliver on our purpose.

"For all these reasons, we are strongly focused on our impact as a charity, and being able to demonstrate it – so we can show our partners, commissioners, funders, and most importantly families how we are helping children and young people to be safer, happier, healthier and more hopeful over the next three years.

"Increasing our income is an important part of how we achieve this."

National Trust

The National Trust has announced plans to "fundraise more in the next decade than in the previous century" as part of its 10-year strategy, which it recently unveiled.

New fundraising strategies, partnerships with major charities, a new apprenticeship scheme and plans to restore 250,000 more hectares of "nature-rich landscapes" and peatland

all form part of the National Trust's plans.

The new measures are the result of the "largest public consultation ever carried out by the National Trust", with more than 70,000 people – including members, volunteers and industry partners – sharing their views.

These plans have been published as the National Trust, which is Europe's largest conservation charity as well as one of the largest landowners in the UK, celebrates its 130th anniversary.

Although the charity would not give a precise figure for its 10-year fundraising target, it raised £98.1m in the year to February 2024 alone as part of an overall annual income of £724m.

To raise more funds, the charity plans to "inspire five million more people to give their time, voice or money in support of the charity's goals" – a figure based on its current membership numbers of around five million.

It aims to raise funds through its new Adopt a Plot scheme, in which individuals or groups will be able to sponsor a plot of land within one of the charity's six nature "super sites" for £7.50 per month.

"[Adopt a Plot] isn't about encouraging major philanthropists," says director of communications Celia Richardson. "It's about how many people can we get connected?"

Richardson adds that the strategy overall is about "helping people feel a little bit more connected to land, even if it's not on their doorstep".

As a charity which historically has "tended to have higher awareness in rural areas among older audiences", she said, it is now increasingly keen to reach a much broader demographic. "We need more donors, more advocates and more volunteers," says Richardson.

"We need more donors, more advocates and more volunteers"

The charity also plans to embrace "micro-volunteering", whereby volunteers complete smaller, short-term tasks, which don't require an ongoing commitment.

Richardson adds that as part of the National Trust's 10-year plan, it is increasingly keen to work in partnership with both larger and smaller charities. "There are things that other charities are doing, that we're watching and learning from and collaborating on – things like No Mow May, or all the organisations that are doing 'toad patrols' and getting citizens involved in caring for nature."

The National Trust is partnering with mental health charity Mind to "help address unequal access to nature and the mental health crisis".

This new partnership will focus especially on supporting young people with mental health issues to access nature and green spaces.

The National Trust is also partnering with Natural England and the National Lottery Heritage Fund to support 100 towns and cities around the UK to grow their networks of green spaces.

SECTION 1
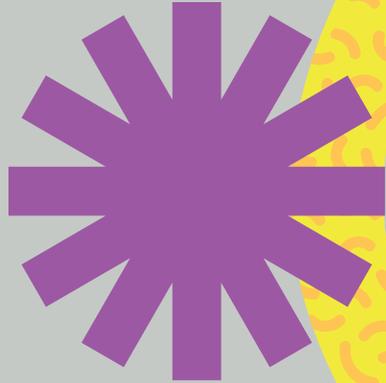
Rapid-response campaigning

A spokesperson for the anonymous group People vs Elon offers insight into how to seize the moment for maximum impact

When Elon Musk did *that* salute at Donald Trump's inauguration, I felt like I had to do something. But what can you do to take on the world's richest man, who owns one of the world's biggest social platforms?

People vs Elon was our response. The idea is simple: turn every Musk tweet into a weapon against the far right. Here's how it works: supporters can pledge as little as 1p for every tweet Musk posts. He tweets around 2,000 times per month, so at 1p per tweet is £20 monthly – but donors can set an amount that it never goes over eg £5, £10 or £25. We then donate the funds raised to causes that represent everything he hates – trans people, refugees, and antiracist groups. Our partners include Everyday Racism, Hope not Hate, Rainbow Migration and Women for Refugee Women.

The campaign was inspired by #DefeatByTweet (see sidebar p12), which raised millions for Black and Brown organisers in the US off the back of Donald Trump's tweets. I've been wanting to do a version of that for years and Musk was the perfect target.

> *"Regular-giving fundraising through organic social is notoriously hard"*

When we launched, I honestly had no idea how it would go. It was an experiment and regular-giving fundraising purely through organic social is notoriously hard.

At the start, we just wanted to recruit 100 pledges, but we have now surpassed 650 supporters. And we are projected to raise at least £100,000 this year.
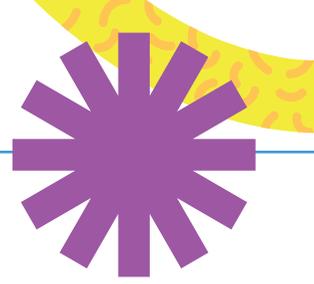
#*DefeatByTweet: A Digital Movement for Social Justice*

#DefeatByTweet is a grassroots digital campaign that emerged in the US as a creative and impactful form of political activism. The movement gained traction primarily during the 2020 election cycle, with the goal of using social media and automated donations to combat systemic racism and challenge the influence of far-right political figures – particularly those who leveraged Twitter, now X, to spread harmful rhetoric.

The premise of #DefeatByTweet is simple but powerful: every time a specific public figure (initially, Donald Trump) tweeted, participants automatically donated a small amount of money to organisations dedicated to racial justice and voter empowerment, especially those working to support Black communities. These donations were often directed toward groups such as Black Voters Matter Fund, Fair Fight Action, and other not-for-profits working at the intersection of civil rights, voting access, and community empowerment.

Participants in the movement signed up through a platform that connected their Twitter accounts to a donation service. They set a donation amount – typically a few cents or dollars – and every tweet from the target would trigger a micro-donation to the designated causes. This model turned the act of tweeting, often used to inflame division or spread misinformation, into a fundraising opportunity for progressive and social justice initiatives.

> *"The campaign turned the act of tweeting into a fundraising opportunity"*

#DefeatByTweet exemplified a new form of protest that combined digital automation, civic engagement, and grassroots fundraising. It channelled the frustration many felt about inflammatory or harmful content on social media into constructive action, effectively "weaponising" tweets for good. The campaign framed it to let those who used social media irresponsibly "fund their own defeat".

Going viral

The campaign also had a strong viral component. It encouraged people to share their participation with the hashtag #DefeatByTweet, turning personal activism into a public and collective movement. By doing so, it inspired others to join and built

momentum online. Celebrities, influencers, and everyday citizens contributed to its growth, helping raise millions of dollars for grassroots organisations in swing states.

What set #DefeatByTweet apart from traditional donation campaigns was its psychological inversion of power. Instead of reacting to upsetting tweets with outrage or disengagement, users responded with tangible impact. Each tweet meant more money to the very organisations the tweet-writer opposed, flipping the script on social media activism and turning negative attention into positive change.

Though the movement initially focused on the 2020 election and Trump's prolific Twitter use, the model it introduced continues to influence digital activism. Its success demonstrated how technology can facilitate micro-philanthropy and how creative strategies can reframe protest in the digital age.

In essence, #DefeatByTweet was not just about politics or tweets – it was about reclaiming agency in the face of online negativity and using technology to build a more equitable future. It showcased how small, collective actions can drive significant social impact, all triggered by the very forces the movement aimed to challenge.

United against hate

People vs Elon is aimed at anyone who feels powerless watching the world's richest man use his immense wealth and power to amplify far-right ideologies – from calling to free far-right activist Tommy Robinson to "make Europe great again".

I think lots of people across the UK have been desperate to stand up against this type of hate. It felt like people wanted do something tangible and immediate in protest.

"Working with a small, agile team has been crucial"

We chose the name "People vs Elon" deliberately because it isolates Musk. Research shows he's incredibly unpopular in the UK, and his views don't represent most of us. While he wants to use his wealth and power to sow hatred, we won't stand for his fascism. As the name shows, we're united against his hate.

To get the message out quickly and to our target audience we decided to promote the campaign almost entirely through organic social media with our partners. In addition to this, we have already secured coverage from the Guilty Feminist, Pink News and Byline Times websites.

We will be keeping donors engaged through regular email updates on their donations' impact. The stewardship

programme is still evolving, as we launched rapidly thanks to help from not-for-profit the Developer Society, which did amazing work to get the initiative off the ground quickly. We are continuing to work with the software developer to iterate on the website and improve the donor experience.

Act fast to maximise impact

People vs Elon is a campaign by People vs Profiteers, which is an organisation we set up last year. The team – including myself, India Thorogood and Alex Green – previously led the Charity Award-winning #StopTheFlights campaign for Freedom from Torture, which defeated the Rwanda deportation scheme by getting airlines to pull out, while crowdfunding legal costs. This approach of taking on corporate targets to achieve political aims became our core strategy.

"Being fast is better than being perfect"

Sometimes – in fact, a lot of the time – being fast is better than being perfect. We got this campaign out within days of Musk's salute at Trump's inauguration. Often, I have found that charities trip themselves up by adding too many layers of sign-off, making it impossible to do the kind of rapid response fundraising that cuts through online.

Working with a small, agile team has been crucial to People vs Elon's success;

it helped us make quick decisions. Sometimes that's the difference between a success and a flop. If you can harness the news cycle, and give people meaningful ways to respond, that can have more impact than big budgets.

Make giving tangible

In today's world, it's so important to stay creative to cut through. There have never been more donation tools for not-for-profits, but that can sometimes mean that fundraisers rely on the presets rather than use their imagination. Try to work backwards from the story you want to tell.

At Choose Love, I led the digital delivery of its Choose Love store, which raised millions by making charitable giving tangible in a novel way – donors could purchase real gifts for refugees. That approach of playing with the way the donation happens informed our strategy for People vs Elon, where we have created a tangible donation mechanism.

People vs Elon is part of our Everyone Hates Elon campaign. We've been doing direct actions around Tesla sales crashing in Europe, including "Don't buy a swasticar" stickers. The response has been remarkable – we sold over 5,000 stickers in a matter of days, with over half the orders coming from people outside the UK.

Beyond Musk-focused campaigns, we are collaborating with River Action UK on a campaign targeting Nando's food chain regarding pollution in the river Wye (see case study p16).

Exercises

Exercise 1

What other rapid-response fundraising campaigns have you come across? Write down three and discuss with your team why you think they were successful.

	Campaign	Why was it successful?
1		
2		
3		

Exercise 2

Thinking about your organisation, who or what would you target with a rapid-response campaign:
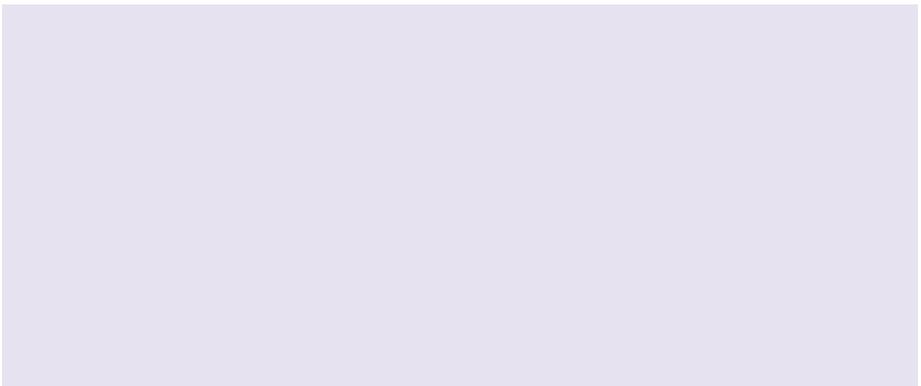
People vs Profiteers

Last year, People vs Profiteers launched a campaign with River Action UK called Nando's Chicken is Killing our Rivers highlighting how pollution from Nando's chicken farms is destroying rivers such as the Wye.

We brought together leading artists, chefs and charities – from Chris Packham and Joanna Lumley to Jo Brand and Hugh Fearnley-Whittingstall – to hold the company accountable.

When we set out to put agricultural pollution of our rivers under the spotlight, we knew we had to get creative. But sometimes, being creative is just as much about crafting the right strategy as it is your tactics.

"Being creative is about crafting the right strategy"

Here are three ways our strategy with the Nando campaign helped us get cut-through:
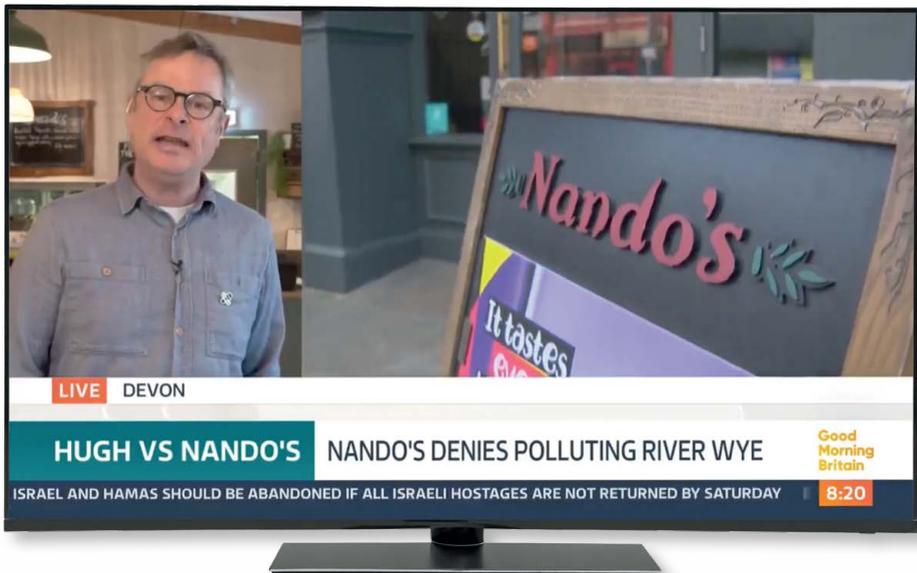
- **Find your target** – As the UK's most famous chicken restaurant, and one that says sustainability "isn't just a buzz word", Nando's was the perfect target for a campaign about pollution from chicken farms.
- **Find the right message** – It's harder than ever before to get cut-through, so it's important to be bold. Imagine the headlines you want to see (like we did for "Nando's chicken is killing our rivers") and work backwards from there.
- **Find the right messenger** – Fearnley-Whittingstall did so well in his Good Morning Britain appearance. Part of what makes him so persuasive as a messenger is that being a chef, he makes the message broader than just targeting Nando's.

> *"Think about the*
> *impact you want and*
> *work backwards"*

Another online strategy we employed to draw attention to the campaign was to react quickly to any related matters. When we saw that Nando's CEO, Mark Standish, had posted his New Year's resolutions at the beginning of the year, we couldn't resist the opportunity to mobilise supporters to post comments underneath it. His response? To delete his account entirely (or at least make it completely unfindable).

When we are thinking about creating impact, sometimes as campaigners it is easy to gravitate towards tactics that deliver numbers we are all used to seeing – such as X number of media stories, or Y people reached, Z petition signatures. LinkedIn accounts deleted isn't exactly a KPI you set yourself, but it's a pretty great indicator that your target is worried about the PR impact of your campaign.

The lesson I would take away from this campaign is to think about the impact you want and work backwards from there. That way you'll come up with more creative asks for your supporters rather than always defaulting to standard tactics.

Contributed by a spokesperson for People vs Profiteers

Exercises

Key questions to discuss:

What aspect of your organisation lends itself to this type of campaign?

Who would you ask to be the messenger?

What would your message be?

What impact do you want to achieve?

How would your campaign go viral?

Which social channels would you use?

Looking at your organisation's social media engagement, which campaigns get the highest levels of engagement, on which channels and why?

Campaign:		
Channels:	Results:	Why:

Campaign:		
Channels:	Results:	Why:

Campaign:		
Channels:	Results:	Why:

Using what you have learned from the feature and case study, check your progress below and use the links for further examples and guidance.

Checklist

☐ Define the impact you want to have

☐ Decide target audience and channel

☐ Decide core message

☐ Choose main messenger

☐ Decide your KPIs

☐ Launch campaign

Notes:

Resources

Case studies:

People vs Profiteers
www.peoplevsprofiteers.org
Campaign group set up to challenge big business on issues around human rights, right-wing ideologies and the environment

#StopTheFlights
www.charityawards.co.uk/freedom-from-torture
Award-winning campaign by Freedom from Torture that helped stop flights deporting refugees to Rwanda

Choose Love
www.chooselove.org
Pioneering a new movement in humanitarian aid to find the local organisations doing the most effective work and give them what they need to help people – whether that's funding, material aid or volunteers

Guidance:

Charity Commission
www.tinyurl.com/ycy8p25n
Guidance on campaigning and political activity by charities

The Commons Social Change Library
www.commonslibrary.org
Offers resources on rapid-response campaigns and other aspects of social change

SECTION 2
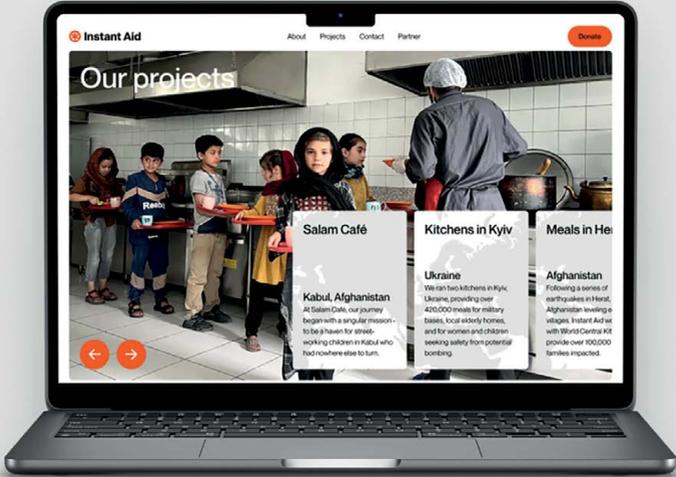
Rebrand *to* grow

Founder of Instant Aid, **Jasmin Mouflard,** and co-founder and chief commercial officer of Driftime, **Abb-d Taiyo,** define how rebranding can grow a charity's donor base and enhance impact

Rebranding is often an overlooked tactic in a charity's fight for donor engagement, brand visibility and organisational growth. But, just like any other commercial business or organisation that strives to reinforce its relevance and credibility in a world of constant change and competition, charities too must reappraise their entire brand world to determine whether it remains fit for purpose.

> *"Rebranding is often an overlooked tactic"*

Brand identity has easily been dismissed as an aesthetics job for aesthetics' sake – a frivolity with no place in the world of charity and not-for-profit. However, brand identity is a critical tool that enhances an organisation's ability to engage, persuade and achieve traction. Consider it a non-negotiable communication tool that articulates purpose and mission to all stakeholders while emotionally connecting with audiences to prompt a call to action.

Effective brand identity reassures and builds trust in a climate where trust is scarce; it tells a story that intrigues and compels while distilling principles and values in an impactful, concise manner. When these elements align, it can meaningfully impact brand perception and realise organisational and business goals.

Rationale for reinvention

Of course, rebranding is a big investment and firmly remains

a business decision. The case for it arises when there have been significant shifts in product or a pivot in proposition; when there are structural changes within an organisation that have resulted in a shift in values and mission, or when existing brand narratives are no longer relevant to modern audiences and are quickly losing engagement.

Positive branding

Presentation is key to establishing credibility and positive brand perceptions from the outset. Whether done consciously or not, the design codes used to form brand marks, brand identities, brand language and the general look and feel of an organisation's brand estate wields influence over our initial opinion. It matters because, as spectators, we make snap judgements and projections about the viability, operations, corporate culture and ethos of a company: is it an organisation we want to partner with? Invest in? Become part of? Support? Is it modern? Innovative? Authentic? Socially responsible?

"Effective brand identity reassures and builds trust"

Unique points of difference must stand out and every element must be primed to achieve resonance. It was precisely this need to be distinguishable and reinforce its positioning as a reliable leader within the charity sector that prompted Instant Aid – the disaster relief not-for-profit, which operates in war zones such as Ukraine and Gaza to deliver essential resources including hygiene kits and food within 48 hours of a conflict's onset – to undertake a transformative rebrand. This meant overhauling its logo, website design and tone of voice to more readily reflect the impact of its work and its commitment to its cause.

Amid the chaos of these crises, Instant Aid understood the necessity to stand out – not just for brand visibility but to also reinforce itself as a beacon of reliability and swift action. Enhancing its credibility through showcasing its work
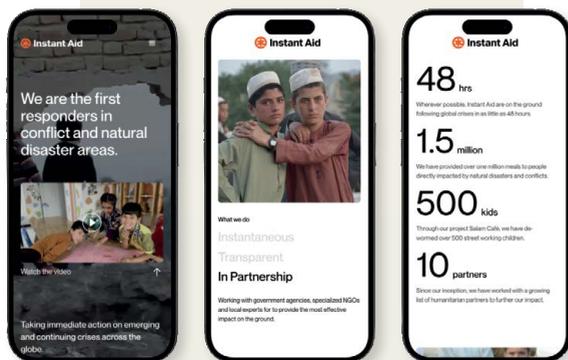
and purpose compellingly and coherently was key to engaging a broad scope of stakeholders – from trustees and donors to volunteers and beneficiaries – to ultimately secure funding and work with larger NGOs.

The aesthetics of impact

The rebranding process requires a fundamental understanding of an organisation's core values and beliefs, which should inform all elements that will shape the brand identity. It requires an analysis of how similar organisations present themselves and how successful they are at communicating "what's on the tin".

To a degree, it also requires an appreciation of behavioural economics – that is, an understanding of the unconscious design codes (from colourways to symbols) we assimilate and associate with particular products, services and directives. Take the colour palette of yellow and black, which can signify danger, or the colours green and blue to convey serenity and nature: these elements can be leveraged.

"Presentation is key to establishing credibility"

Rebranding is not about completely nuking the existing identity either; in many instances, established brands will retain some of the familiarity of their original identity, especially when there is significant brand equity already built within those assets (for example, the brand mark is generally recognisable to audiences and they already have some kind of connection with it). This equity must be respected and used as a creative springboard for reinvention.

The whys of effective charity rebrands

1. **Donor perception** – a rebrand can reignite donor interest and attract new demographics.
2. **Tapping into new markets** – opportunities to rebrand can expand global outreach.
3. **Emotional appeal** – rebranding enhances how charities tell their stories to forge stronger emotional ties.
4. **Organisational cohesion** – rebranding can align internal teams and external stakeholders around a refreshed mission and vision, improving and revitalising engagement.
5. **Visibility** – effective storytelling and publicity can attract new partnerships and fuel growth.
6. **Reinforce relevance** – rebranding provides the opportunity to reaffirm and reinforce a charity's values reflective of the modern world.

It was observed that intricate logos and light blue colour palettes are commonly employed by many legacy NGOs and that, to achieve distinction, Instant Aid needed to depart from that aesthetic to a colourway that underscored its positioning as an early responder within a crisis. Thus, the incumbent light blue colour crest was replaced by a six-pointed "medicinal star" delineated in a vibrant orange-red hue to convey urgency; the emphasis on the third spoke of the star symbolising early response.

This clean, simplified brand mark draws visual influences from colours and symbols that infer attention, immediacy, and a clear call to action that captures Instant Aid's modus operandi.

"Rebranding is not about nuking the existing identity"

Brand language

While the rebranding work was taking place, an interim website was developed to play a crucial role in facilitating conversations and building trust with influential organisations and institutions amid global crises.

Brand language was also recast to cultivate a fresher, more pioneering voice that engenders a sense of positivity, empowerment and reassurance – all elements required in a guiding force helping partners navigate chaos to ensure the swift delivery of vital resources.

The strategic imperative

Founded in 2022 in response to the conflict outbreak in Afghanistan, Instant Aid is quite a new entity for rebranding when you consider that the obligation often falls on heritage organisations whose brand identity has become dusty and outdated and are losing market share against fresher disruptors.

Yet Instant Aid's decision to rebrand is underpinned by a wider strategy to accelerate its growth and broaden its impact quickly. Rebranding provides a unique opportunity to convince future stakeholders about why, as an organisation, it matters. Rebranding provides for better storytelling, improves public perception, broadens audience engagement and wins donor trust.

Charities are increasingly taking heed of the business potential that comes with rebranding, especially at a time of economic and geopolitical instability when, as vital institutions, they are needed the most. This elevates the importance of strong branding to achieve organisational goals. Perhaps this signifies the advent of a wider shift in not-for-profit strategy to behave more like challengers – that is, agile, responsive and in touch with the present as well as the future.

Exercises

Thinking about your organisations overall current brand identity, list five thinks what work and that could be improved:

	What works?	What doesn't?
1		
2		
3		
4		
5		

Think of ten adjectives to describe your organisation and what it does. Does your current brand reflect this?

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10	
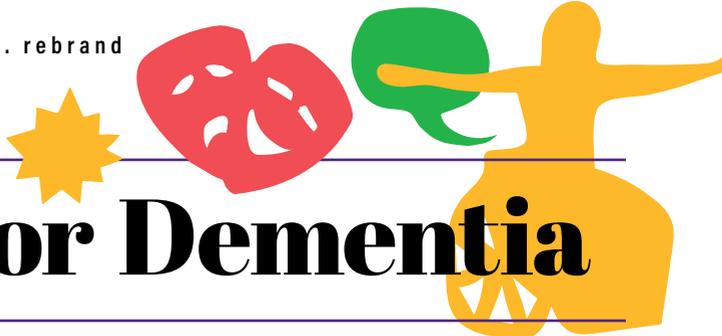
Arts for Dementia

At Arts for Dementia, our brand was over 10 years old; it had served us well in that time, but it was looking tired. Our new strategy, introduced in 2023, is all about the future; about being uplifting and inspiring, fulfilling our purpose to enable creativity. We needed to make that clear, and we wanted everyone to feel it as soon as they saw our logo and our website.

Communication is key

Like most charities, we need to communicate with our users and supporters, send out regular flyers about our programmes, share content in our newsletters, and talk about impact to our funders. All six of the team make content, and as creatives we all love designing. We were making great content, but it was all different. We needed guidelines on text or style.

This meant changing our name slightly and adopting a new typeface, colour palette and establishing clear spacing and contrasts. Building on the idea of hand-crafted icons, we chose to use pictograms and selected the one that offered the greatest optimism and versatility.

Rebrand process

As a smaller charity, our budget of £20,000 – nearly 10% of our income –

was going to be a really big investment for us, and one that we all wanted to be involved in – that would have meant the six of us, our nine trustees, our many beneficiaries, and our partners and funders, which was clearly too many. So, we set up a smaller working group that represented everyone and planned a five-month timeline from project brief to website launch, first soft and then full.

"Our new strategy is all about the future; about being uplifting and inspiring"

The new brand had some specific objectives:
- A new direction – reinvigorate the Arts for Dementia identity to be trusted, emotive and modern.
- Empathy and trust – empathy is the foundation of our service; it needed to be placed at the heart of everything we do, to create trust with new audiences.
- Be bold – we wanted an identity which stands out and creates confidence.

The new brand also needed to work for

our beneficiaries because they access our workshops and information via the website, so we got them involved. Because we wanted co-production with people with dementia to be core to this process, we included workshop participants and those with lived experience of dementia in the working group. They were involved in generating ideas, developing concepts and giving feedback at every stage, and we also consulted more workshop participants at key stages.

"Our new branding is clear, distinctive and creative"

Having decided that pictograms would be key to the brand, we ran creative workshops. People created cut-outs that represented the arts and activities that they love. We ran one workshop for people affected by dementia, and another for our wider stakeholders (trustees, artists, volunteers, funders, and partners from cultural organisations) and their pictograms became a cornerstone across the brand, creating a toolkit of visual assets.

Revitalising the website
The website design focuses on accessibility, vibrancy, hope and enjoyment. There is a strong focus on people and human connection – here photography helps to reinforce the focus on life after diagnosis, to showcase the creative agency of those living with dementia, and the interaction between participants and their carers, artists, volunteers and each other.

We were keen to streamline the user experience. That meant adhering to accessibility standards, implementing alt-tagging, which helps screen-reading tools describe images to visually impaired readers and aids search-engine optimisation, and introducing a mouse-free navigation system for those with mobility-based disabilities.

Fundraising value
The fundraising value of a visual transformation is huge. The donate button is on every page now and you really don't have to look hard for it anymore. We have signposted each fundraising interest and they are now easily updated. Everything is clearer, and more engaging; our social media presence links more easily to our website and inspires more connection to our work.

Our new branding is clear, distinctive and creative; we are proud of it, and it reflects our professionalism and purpose. The website is now a great place to share our stories and achievements.

By Sharon Frankland, fundraising manager at Arts for Dementia

Arts for Dementia

Exercise 1

If you are embarking on a rebrand, it is important to be clear about the objectives. Prioritise the following words and phrases to help decide on what you are trying to achieve:

Relate better to beneficiaries ◯   More colours ◯

Grow trust ◯   Be more accessible ◯   Standardise ◯

Modernise ◯   Be more bold ◯   Change of direction ◯

Revamp image ◯   Be clearer ◯   Grow donor base ◯

Can you think of other reasons for a rebrand?

Exercise 2

If you were going to invite an agency to pitch to do your rebrand, what three questions would you ask them?

1

2

3

Using what you have learned from the feature and case study, check your progress below and use the links for further examples and guidance.

☐ Review existing brand

☐ Define objectives of the rebrand

☐ Engage stakeholders

☐ Set budget

☐ Put out for tender (optional)

☐ Instruct creative

☐ Gather feedback

☐ Brand launch

Notes:

Case studies:

Arts for Dementia
www.artsfordementia.org
Dementia charity that recently underwent complete rebrand as part of its new strategy

Instant Aid
www.giveinstantaid.org
Underwent complete brand revamp to modernise and better reflect the emergency response charity's mission

Survivor Space
www.survivorspace.org.uk
A feminist organisation committed to supporting survivors of sexual abuse, rape, domestic abuse, and harassment, recently underwent a brand overall

Guidance:

Charity Digital
www.tinyurl.com/3uu2ewf6
Charity Digital guide explains how you can build the perfect brand guidelines in five easy steps

In-depth: How can charities make a rebrand successful?
www.tinyurl.com/32b9anyj
Article from Civil Society exploring how charities rebrand, change logos and develop new messaging and websites

Charity Comms
www.charitycomms.org.uk
Recently published a handy 10-step guide to embedding a charity rebrand

SECTION 3

Maximising
the impact of
corporate partnerships

CEO **Matt Whittaker** shares insights from a PBE report on charity-business relationships

At PBE (formerly Pro Bono Economics) charity, we use economic expertise to empower the social sector, helping charities and policymakers to address low wellbeing across the UK. We published a report at the end of 2024 – A Prosperous Partnership: Supporting Better Collaboration Between Charities and Businesses – to help charities maximise the impact of corporate partnerships.

Done well, business-charity partnerships have the potential to produce significant benefits for all parties. By collaborating with purpose driven firms, charities can access new resources, expand their reach, and benefit from new perspectives and sources of expertise. Businesses meanwhile can secure deeper employee engagement and wider reputational boosts. Most importantly, both partners can deliver greater impact

for those they are seeking to help.

But such partnerships aren't always done well. Short-term charity of the year efforts can feel superficial, with charities competing in resource intensive beauty parades for sugar-rush support that is unlikely to endure. Similarly, some charities report feeling pressured to create make-work tasks to occupy corporate volunteers to secure the cash that comes alongside such programmes. The result? Wasted effort, strained relationships, and missed chances for lasting impact.

"Business-charity partnerships have the potential to produce significant benefits"

Worse still, collaboration between the private and social sectors is all too often absent entirely. The Law Family Commission on Civil Society showed that UK businesses donate an average of just £450 a year to charities – broadly in line with the amount held in petty cash. It's not that British business isn't looking to do good, merely that it too often does it in parallel with civil society rather than in partnership with it.

Changing this picture to the benefit of all means striving to establish partnerships that are truly transformational. To do so, charities and businesses must focus on four core areas: establishing a shared purpose; prioritising clear communication; building clear structures and strategies; and focusing on long-term impact.

Establishing a shared purpose
When it comes to building partnerships that last, it's all about finding shared purpose – the thing both sides genuinely care about. That means going beyond a marriage of convenience in pursuit of a cause that sounds good, to instead finding common ground on an issue that goes to the core of each partner's identity.

Take the relationship that exists between Boots UK and the Hygiene Bank. The retailer's founder believed everyone should have access to soap and a sponge, yet more than 150 years on this is still not the case. It sits very naturally therefore for Boots to work with the Hygiene Bank, encouraging customers to donate goods and part matching them, and then redistributing to those who need them.

The fit may not always be quite so intuitively obvious as this, but that doesn't mean it can't be established if the will is there. In any event, it's important that fundraisers kick the tyres on the sincerity of an approach from a potential corporate partner. Sometimes, it's better to say no than to jump into something that doesn't fit with your goals. This requires a degree of self-confidence, and the temptation to compromise can be great when faced with the difficult economic backdrop that currently prevails. But a bad relationship entered in haste can be costly further down the line, generating inefficiencies, dulled impact and disillusionment.

"It's all about finding shared purpose"

To avoid this as a charity, be clear about your value proposition. Ask yourself what your strengths are and what you uniquely offer – whether it's deep expertise, a unique approach, or powerful connections to the community. Then, armed with answers to those questions, prioritise finding the right partner, rather than the right-now one. When a business truly integrates a charity's mission into its culture, it creates a long-lasting, meaningful commitment that benefits both parties and drives real, sustainable change.

Prioritising clear communication

Clear and open communication is the heart of any successful partnership. Setting up expectations early on makes all the difference – it ensures both sides understand the other's goals, resources, and added value. When you kick things off with clarity, it's much easier to avoid misunderstandings, sidestep misaligned ambitions, and keep things running smoothly even if priorities shift over time.

Start by sitting down together and having an honest conversation about what each of you hopes to achieve. What's the big-picture vision, and what's the realistic plan to get there? Define each partner's role and responsibilities so you are clear on who's doing what from the beginning. It's tempting to dive straight into the work, but a little extra time spent aligning on goals upfront can save a lot of hassle later.

And it's important to keep checking in along the way too. Priorities frequently shift, and responsiveness to changed circumstances can bring its own rewards. As long as both parties are open to discussions on where adjustment might be needed, nasty surprises can be avoided. Regular check-ins let you talk about what's working and what needs to change.

Building clear strategies

Beyond having a shared mission and keeping communication open, effective partnerships thrive with a clear structure that respects what each side brings to the table. When you have a solid plan that lays out how things will work, you're free to focus on your core missions instead of getting tangled in the admin.

"Don't just chase short-term wins"

A great example is the Strand Palace Hotel's collaboration with Only A Pavement Away – a charity that works with people facing homelessness, former prisoners and veterans, by helping them find employment in the hospitality sector. For the charity, the partnership provides more than just a source of job placements – it's a chance to offer real, sustainable pathways out of hardship for those they support.

The partnership is structured with clear roles and goals. Only A Pavement Away benefits from the hotel's commitment to offering training and job placements, along with funding

to expand its reach. This type of collaboration is built on shared resources and goals, allowing the charity to scale its impact while offering those it supports the opportunity for long-term employment.

By working together using shared tools and systems, such as consistent platforms for tracking progress and impact, the charity can efficiently measure the success of the partnership. Streamlining processes such as reporting ensures that the focus remains on achieving tangible results, making the partnership a strong, sustainable one that benefits the charity and the beneficiaries.

Adopting a long-term focus

Shifting from short-term projects to long-term partnerships can take impact to the next level. When both sides commit for the long haul, you build trust, refine how you work together, and create a deeper, lasting impact.

Take for example Benefact Group's partnership with the Gloucestershire Deaf Association. The charity benefits from a sustained and predictable flow of money that has allowed it to establish mutual support networks for deaf children and their families. But the long-term nature of the relationship means that Benefact goes further, providing advice to the charity while raising awareness and understanding among its own employees through the provision of dedicated training sessions.

Place-based partnerships – focused on a shared community – are another way to root these collaborations,

making a real difference locally while boosting both partners' presence in the community. Long-term partnerships ensure resources are used sustainably, enabling both sides to respond effectively to new challenges and opportunities.

"Real magic happens when we move beyond cookie-cutter partnerships"

Key takeaways for fundraisers

For fundraisers, the secret to successful business-charity partnerships is taking the time to find the right match. Work with businesses that truly share your values and vision – don't just chase short-term wins. When both sides are genuinely invested, it leads to partnerships built on trust and mutual respect.

And the real magic happens when we move beyond cookie-cutter partnerships that embed a power imbalance. By focusing on building long-term, thoughtful collaborations, fundraisers can help to create relationships that bring lasting, positive change. These partnerships are about going the distance, not just ticking boxes.

So, fundraisers, lean into purpose driven partnerships that stand the test of time. With a shared mission and commitment, you can unlock incredible value – not just for your charity, but also for the wider community.

Exercises

Thinking about your organisation, identify the industries that would be a natural fit:

Think of three companies that could be potential partners and note down why you think so:

	Company	Why?
1		
2		
3		

What would be the key benefits of a new corporate partnership? Both for your organisation and your partner:

Company	Why?

Tree of Hope

For over 30 years, Tree of Hope has supported thousands of families across the UK in raising millions of pounds for lifesaving treatments, therapies, equipment and home adaptations for their disabled or seriously ill children.

Tree of Hope operates as an umbrella organisation, helping families fundraise for their individual child's healthcare needs. However, we also need to secure funding to support our own family support service and cover core operating costs. Balancing these two fundraising focuses presents a unique challenge. We must promote each family's campaign while also raising funds to sustain Tree of Hope itself, a message that can be difficult to communicate to funders and donors.

To meet this challenge, we knew we needed to innovate and find new ways to engage supporters. This led us to create Partners in Hope, a fundraising initiative designed to support both the families we serve and Tree of Hope's long-term sustainability.

Bridging the gap
Partners in Hope forms part of our new three-year strategy, Bridging the Gap. Our overarching aim is to help families access funding faster so they can secure life-changing healthcare sooner.

In reviewing our strategy, we took a close look at our existing fundraising approach and found we were spreading ourselves too thin. We were investing effort across several income streams, some of which required significant capacity with limited return. To fulfil our new strategy, we knew something had to change. Streamlining our efforts, and working smarter with our resources, offered an opportunity to focus on partnerships that could benefit family fundraising campaigns directly and boost our core funding.

"To fulfil our new strategy, something had to change"

Heart of the new strategy
Partners in Hope sits at the heart of our new strategy. This initiative aims to collaborate with corporate partners and organisations to establish dedicated funds for children and young people's healthcare needs. Through these partnerships we aim to:

- Reduce the fundraising burden on families – providing immediate access to funds for specific needs allows families to focus on their child's wellbeing rather than spending time on fundraising.
- Enhance accessibility – fundraising is not feasible for all families. With dedicated funds, we can reach families who may not have the resources or networks to raise the money they need.
- Ensure organisational sustainability – each partnership also helps cover our core operating costs, allowing

"Engaging face-to-face with industry professionals has been invaluable"


us to sustain and expand our support services.
- Align with corporate social responsibility (CSR) goals and values – we offer companies meaningful opportunities to make a direct impact, aligning with their CSR, and environment, social and governance objectives.

Our approach

While we have successfully partnered with corporate sponsors in the past, the scale we aspire to with Partners in Hope requires a more focused and strategic approach by:

- Building a compelling case for support – we have collated research, family feedback, and data to illustrate the growing need for home adaptations.
- Feedback and testing our thinking – we reached out to warm industry contacts, via trustees, our network and existing corporate supporters, to test our ideas.
- Visibility in industry spaces – engaging face-to-face with industry professionals has been invaluable.
- Power of storytelling – real-life stories of families have been essential to building connections.
  - Harnessing the ripple effect – building connections is about more than immediate results. Even if our first contact isn't the decision-maker, we inspire them to champion our mission within their company.
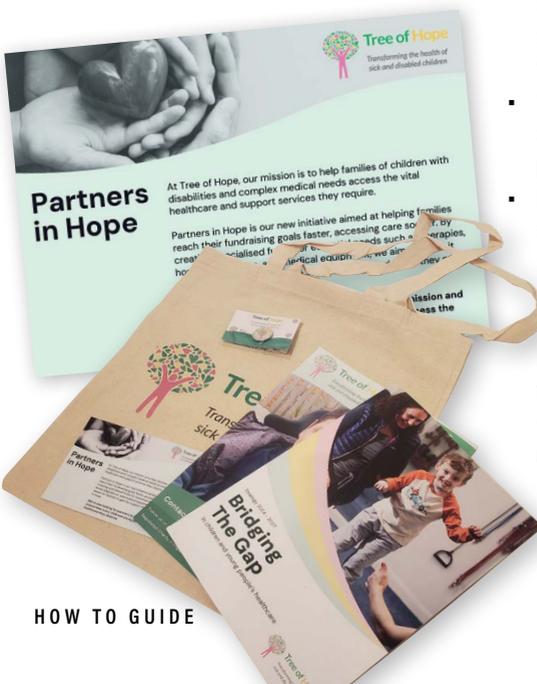
By Becky Andrew, CEO of Tree of Hope

Exercise 1

What are your priorities in a corporate partnership?
Number the following words and phrases in order of importance:

Volunteering ⬤

Long-term strategic partnership ⬤

Alignment of values ⬤

Community engagement ⬤

Major donor giving ⬤

Access to network ⬤

Raising awareness of your cause ⬤

Fundraising ⬤

Publicity ⬤

Retail or merchandise opportunities ⬤

Others:

Exercise 2

What would be your approach to a potential corporate partner?
Write down three things you would present in your pitch:

1

2

3

Using what you have learned from the feature and case study, check your progress below and use the links for further examples and guidance.

Checklist

☐ Identify potential partners

☐ Formulate strategic
objectives of partnership

☐ Determine benefits
for both partners

☐ Make initial partnership

☐ Communicate clearly
expectations and commitment

☐ Develop sustainable
long-term strategy

Notes:

Resources

Case studies:

Boots UK and the Hygiene Bank
www.tinyurl.com/yc8fwdyv
National partnership that encourages customers to donate goods and part matches them, and then redistributes to those who need them

Only a Pavement Way
www.onlyapavementaway.co.uk
Learn more about the homelessness charity's partnership with Strand Palace Hotel

Benefact Group's
www.benefactgroup.com
Benefact Group's partnership with the Gloucestershire Deaf Association

Guidance

Pro Bono Economics.
www.tinyurl.com/2trccmjd
Visit to download the full A Prosperous Partnership: Supporting Better Collaboration Between Charities and Businesses report

**Law Family Commission
on Civil Society**
www.civilsocietycommission.org
Reports and research on civil society in the UK including work on the value of corporate partnerships

Charities Aid Foundation
www.tinyurl.com/4fwyyuv3
CAF Advisory and Business Development Manager shares expertise on how small charities can successfully build corporate partnerships

SECTION 4

Authentic *storytelling*

Academic at University of Arts London and consultant **Jess Crombie** highlights the benefits of beneficiary-led narratives

Recent reflections on race and colonial legacies, including how we communicate about aid work, has been a catalyst for changing our narratives in the charity sector. The subsequent shifts have been many. Firstly, we have seen practical shifts: the development of in-depth informed consent processes; story production ways of working evolved to provide time for contributor input; editorial choice checkers developed to guide those creating communications and fundraising materials around how to do this equitably.

However, these changes are not deeply embedded yet. Today we face a tough funding environment, politicians who are playing into a national-over-international agenda, and the rollback of many large corporations' investment in diversity, equity and inclusion. Meanwhile, public opinion, while certainly more engaged and informed, is still catching up with the idea that harm and good are not mutually exclusive.

"Changes are not deeply embedded yet"

Lack of detailed data

The sector also lacks detailed quantitative and qualitative information demonstrating the outcomes of such initiatives. Communicators and fundraisers who are keen to enact narrative shifts, need compelling data that proves this change trajectory is going to allow them to meet their income and engagement KPIs.

Over the past years, I have been carrying out tests designed to:
- Build a story production methodology (contributor-centred

storytelling – CCS) that enables contributors (otherwise known as beneficiaries) to lead decisions over what story is told about their experiences, to tackle stereotyping.

- Prove that this method of story production creates fundraising content that can meet or exceed financial and engagement supporter KPIs by carrying out live A/B tests.
- Share resulting data publicly with the sector to encourage and influence for narrative change.

"Fundraisers who are keen to enact narrative shifts, need compelling data"

Contributor-centred storytelling

The act of creating communications materials is intrinsically bound up in complicated power dynamics. It can help to imagine the process of story production as a triangle of power, with different actors holding different amounts of power to influence narratives.

In the traditional narrative power triangle, the sector makes the editorial decisions so has the greatest amount of power, and the audience impacts the stories told through their response to those stories, so also holds substantial sway. The contributors to the stories do not hold power, as while they are depicted in these stories, and while their voices and testimonies may be included, they are framed by the editorial choices of the sector; asked to answer predefined questions to fulfil a predefined brief.

The new narrative power triangle is one in which power is shared by all the actors. The sector and audiences maintain their existing power, but the contributors also play an active role, impacting narrative decision-making.

The central idea of CCS is to create a team of experts made up of international non-governmental organisations staff from the fundraising and/or communications teams, audio-visual expertise from in-house or external resource, and affected individuals who bring lived and contextual expertise. This group makes the editorial decisions about what story to tell, and how.

Inspiring audiences

Providing data to prove that narrative change engages and inspires audiences to act is imperative.

The CCS methodology has now been tested with several organisations. These tests provide data to prove that story materials created in partnership with the affected population and shared with supporters generate equal or even greater income.

The first test was carried out in partnership with Amref Health Africa in 2021. Amref sent two direct mail appeal packs to about 1,800 people on its UK supporter database, with the database split 50/50 for the test. The first pack was created by Patrick Malachi, a community health worker

in Nairobi, Kenya. He controlled all editorial decisions, took, and selected the images, and told the story in his own words.

The second was created by Amref, using a professional photographer with text written by its CEO.

The Who Owns the Story? report that followed this test, published in March 2022, concluded:

- The appeal designed by Malachi raised more money than the one created by UK-based fundraisers – and 38% more compared to previous appeals.
- Stories produced by people from their own communities feel more authentic and can create a stronger emotional bond with donors.
- Donors, questioned during interviews following their donation, recognised the positive challenge to some of the stereotypes INGOs are accused of perpetuating: "It's good to see the old paternalistic model of charitable donation give way to a realisation that Africans are capable of making their own decisions," said one respondent.

The second test was carried out in 2023-24 in partnership with UNHCR. This was undertaken in two phases, initially in Bangladesh in partnership with four individuals living as refugees from the Rohingya community in Cox's Bazar, and later in Kenya with 10 individuals living as refugees in Kakuma. The Bangladesh appeal was shared with over 300,000 donors across the USA and Canada; the Kenya appeal is still in production at the time of writing, so here we will share data from Bangladesh appeal only.

The donor group were again split 50/50 and the appeals were released as a blind A/B test – donors were not told that they were taking part in a test until afterwards. Donors in Canada received a direct mail appeal and an email; donors in the USA received only email.

The report detailing the process and the outcomes – Rethink, Reframe, Redefine: Co-Creation and Storytelling – concluded that:

- Donors are equally likely to give to refugee-led fundraising appeals in some, but not all markets.

In Canada the participant pack (direct mail and email) raised more money than the control. In the USA (email only) the participant pack raised less than the control.

- Donors (responding to an online survey) self-reported that they were motivated to give by refugee-led storytelling. Seeing a story created by a refugee made them feel 71.5% more likely to donate and 28.5% equally likely to donate (USA). Seeing a story created by a refugee made them feel 35% more likely to donate and 62.5% equally likely to donate (Canada).
- While a minority of donors did notice that this appeal was refugee-led, the majority did not. However, this didn't affect their giving habits.

The results of these two tests with Amref and UNHCR demonstrate that appeals created using the CCS methodology, which prioritise the narrative choices and preferences of contributors, can raise more money, but crucially, do not raise less money. The principle of donor-centricity, which is dominant within sector strategic thinking, is to give donors what they say they want. But the results of this study have shown us that donors do not always notice when we give them something different, but also – and crucially – that it doesn't affect their propensity to give. This last metric is the most important as it gives us a green light to mainstream ethically-focused narrative change, without having to risk our income.

Making the change

Here are some practical recommendations for changing your communications narrative:

Start small – Test and learn, as a working methodology, will be embedded in all your working lives, so approach this in the same way. Find a small opportunity for enacting a contributor-centred storytelling method of working, develop story materials, and then test them with a micro audience, gather data and test again. Iterate and learn as you go.

Find partners internally and externally – In the spirit of information sharing, seek out those who are also interested in this area and share knowledge. Host a lunchtime talk, set up a Slack channel, form a working group, form a reading group, find external friends.

If you do carry out this work, share it outside your organisation – You don't have to write a detailed report, but publish a blog, host a lunchtime talk, or share the data in your new external partner group. There is real appetite for information, and the more open we can be, the more we can learn and grow together to enact change.

Exercises

Exercise 1

**Discuss in your team the key learnings from this article.
Some key questions to ask:**

What were the main takeaways from the two test campaigns?

How did donors respond?	What made the storytelling authentic?

What is the new narrative power triangle?

What is CCS?	What are the three recommendations to adopt to make the change?

Exercise 2

**Thinking about your own organisation, what changes could you
make to drive authentic storytelling? Think of three action points:**

1	
2	
3	

WaterAid

WaterAid decided to use an immersive approach to storytelling for its Where There's Water appeal to share tangible, specific and deeply personal stories.

A portion of the money raised will directly fund clean water for the rural community of Chinganji in Malawi, meaning we can illustrate with precision exactly where the donations will go.

Developing a concept

The involvement of the community was essential in developing our campaign concept. Safeguarding is essential, which is why in Chinganji, the process started with the WaterAid Malawi team giving a full briefing together with the community leaders, in the local language, to ensure everyone was aware of their rights and expectations.

Following the initial recce with a small team getting to know the community, it became apparent that a story of parallel lives would powerfully illustrate the positive impact of having water. We started looking for people who were linked, perhaps through their

work or church, or children who were friends at school, but who lived in different circumstances – one with water and the other without. We found Merifa and Rachel, the girls who are central to the main film.

"The involvement of the community was essential"

The team sat down with those involved, looking at the storyboard together, and giving the community the opportunity to feed in.

When considering ideas, we asked families questions such as: How does the overarching idea for the film feel to you? Does it resonate with you? Is there anything we need to change to make it more authentic? In this way, the community helped shape the creative development of the storyboard and narrative – all based on their real lives.

Thinking specifically about the people of Chinganji who are at the heart of

Merifa & Rachel
Chinganji, Malawi

Merifa has clean water at home   Rachel does not

our campaign, the team observed how interconnected everyone is there, and we see that illustrated through the community's Matamando choir. However, only those with water closer to home, such as Merifa, had time to attend choir practice; for others, like Rachel, this time was needed to collect water.

Insights and learnings

We've found it's best to be flexible in our themes and approach to produce high-quality and authentic storytelling. For this appeal, we wanted to focus on the impact of clean water, but we took our time to fully understand the community and the context of their lives, before we developed the final campaign messaging, look and feel.

Translators are vital – never underestimate the part they play in allowing conversations with community members to be genuine and natural. We always build in time to prepare and brief translators, perhaps even interviewing them to seek out experts who put people at ease.

The other thing you need is time. The depth of preparation ahead of the content collection is key. We find factoring in time for two trips is effective, if time and budget allows: the recce with initial photography and broa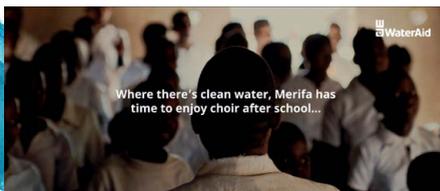d case-study gathering, followed by time for creative development back in the office, and finally the return trip to ultimately deliver richer storytelling, and a lot more nuance.

"Authentic outputs depend on authentic inputs"

Authentic outputs depend on authentic inputs and a commitment to building reciprocal relationships with community members. It is often a case of flipping the power dynamic on its head as much as you can. Let communities teach you things; allow them to lead. Find the balance and try not to impose on people too much; be alert to that, and give people a break. Allow familiarity to come into play.

From our in-house anthropologist filmmaker giving training to staff on how to interview in a more representational way, to increasing the dialogue between the WaterAid Malawi team and the community, each step allowed enough time and space to let the unique stories of this community shine through.

By Wanji Wambari-Kairu, head of supporter marketing at WaterAid

Where there's clean water, Merifa has time to enjoy choir after school...

In Chinganji, less than half the children have clean water at home

Donate today
Search: WaterAid.org

Exercise 1

What are the benefits and potential challenges of adopting this approach to authentic storytelling at your organisation? Discuss with your team and note down some thoughts:

Benefits	Challenges

Exercise 2

What kinds of stories could your beneficiaries tell? Note down any that you have heard and share them with your team:
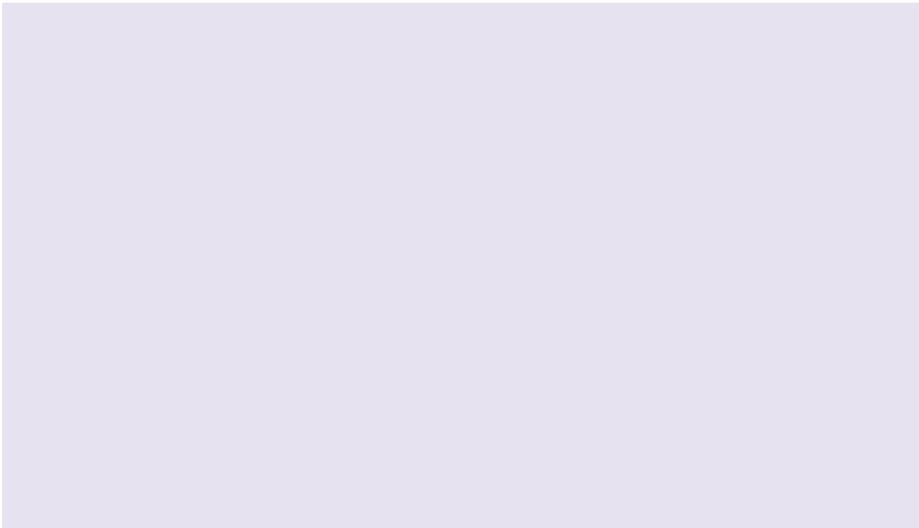
Using what you have learned from the feature and case study, check your progress below and use the links for further examples and guidance.

Checklist

☐ Identify the community at the heart of the campaign

☐ Conduct a recce to source partners including translators

☐ Ensure safeguarding procedures are in place

☐ Engage community to create a storyboard

☐ Work with the local creatives

☐ Produce campaign and collateral

☐ Gather feedback from community

☐ Launch to donors

Notes:

Resources

Case studies:

**WaterAid's
Where There's Water appeal**
www.youtube.com/
watch?v=a6vm2ZJeUYw
Watch WaterAid's Where There's Water winter appeal on YouTube

Amref: who owns the story?
www.amrefuk.org/news/2022/04/
who-owns-the-story
The full report by Amref on its participatory storytelling approach published in March 2022

Jess Crombie Consultancy
www.jesscrombieconsultancy.com/
research
Download Jess Crombie's Rethink, Reframe, Redefine: Co-Creation and Storytelling report

Guidance:

Nonprofit storytelling
www.torchbox.com
Handy toolbox on how to develop an authentic storytelling campaign

Cultivate your content
www.cultivateyourcontent.co.uk/
authentic-storytelling-charities
Useful blog about authentic storytelling strategies for charities

CharityComms
www.tinyurl.com/76znw7c6
Six tips you can use to nurture your storytellers

SECTION 5

Digital *transformation* strategies

When it comes to digital transformation, the not-for-profit sector stands at a pivotal juncture, says new business sales executive at Embridge Consulting **Jaime Gilbert**

Adopting a digital-first mindset is no longer a luxury but a necessity for organisations striving to maximise their impact and income. However, this can be challenging in a space where traditional methods have dominated.

> *"Not-for-profits that fail to embrace digital-first strategies risk falling behind"*

The transition to a digital-first approach can unlock new efficiencies, enhance supporter engagement and,

ultimately, drive mission success, so there is no greater time than now for organisations to think differently about their operations. Here are some ways not-for-profits can make this shift.

Recognise the imperative
The first step to digital transformation is to acknowledge the benefits it can bring. According to a report by the Nonprofit Technology Enterprise Network, 72% of not-for-profits identified outdated technology as a significant barrier to their success. Embracing digital transformation can address this challenge, streamlining operations, reducing costs, and freeing up valuable resources that can be redirected towards an organisation's

core mission. In fact, organisations reported increases in efficiency and productivity of up to 30% after implementing digital solutions, according to a Microsoft study.

Beyond recognising the potential benefits of digital transformation, it's vital to acknowledge and understand the risks of maintaining the status quo. Technology is advancing rapidly, and not-for-profits that fail to embrace digital-first strategies risk falling behind their peers.

This could mean they struggle to meet the evolving expectations of supporters, volunteer fundraisers, and beneficiaries, and they may find it increasingly challenging to compete for funding and support.

Cultivate a digital culture

Embracing a digital-first mindset goes beyond just adopting new technologies – it requires a fundamental cultural shift. Leadership must champion digital initiatives and foster an environment where innovation is not only encouraged but celebrated. This includes creating space for experimentation and learning from failure, as well as rewarding staff who demonstrate digital fluency and creativity.

Cultivating a digital culture also involves investing

in the development of digital skills at all levels. This may include providing training on specific tools and platforms, as well as fostering a mindset of continuous learning and adaptation.

By empowering staff to embrace digital technologies and approaches, not-for-profits can harness the full potential of their workforce to drive meaningful change.

Leverage the power of data

Data is increasingly recognised as one of the most valuable assets for organisations across sectors, and not-for-profits are no exception. By implementing robust data management systems and analytics tools, not-for-profits can gain deeper insights into their operations, stakeholders, and impact. This data-driven approach enables organisations to make more informed decisions, identify trends and opportunities, and measure the effectiveness of their programmes and interventions. Leveraging the power of data also involves ensuring that data privacy and security are prioritised. Charities must implement appropriate safeguards to protect sensitive information and comply with relevant regulations. Demonstrating a commitment to responsible data stewardship will allow organisations to build trust with donors and beneficiaries.
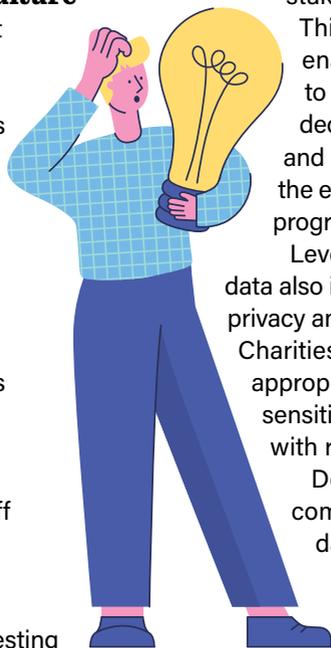
Optimise supporter engagement

Digital tools offer not-for-profits new opportunities to engage with donors and supporters in more meaningful and impactful ways. Leveraging social media, email marketing, and other digital channels allows organisations to reach a broader audience and cultivate deeper relationships with individual donors, and personalised and targeted campaigns informed by data analytics can increase donor retention and drive higher donation rates.

In addition to soliciting donations, digital platforms can be used to engage donors in other ways, such as volunteering, advocacy and peer-to-peer fundraising. Providing opportunities for supporters to get involved in the organisation's mission in diverse and meaningful ways enables not-for-profits to foster a sense of ownership and community that extends beyond financial contributions.

Enhance collaboration

Digital transformation enables not-for-profits to collaborate more effectively with internal and external stakeholders. Cloud-based tools and collaboration platforms make it easier for staff to communicate and collaborate across teams and locations, breaking down silos and boosting knowledge sharing.

Externally, digital tools can expand outreach efforts, allowing organisations to connect with a global audience, build partnerships, and mobilise volunteers more effectively.

Statistics highlight the transformative potential of digital collaboration and outreach efforts. According to a survey by TechSoup, 78% of not-for-profits reported that technology had helped them collaborate more effectively with partners and stakeholders.

Furthermore, a study by the National Council of Nonprofits in the US found that organisations with strong digital outreach strategies were able to reach a wider audience and attract more support, resulting in an average increase of 30% in donations.

"Not all technology investments will be right for every organisation"

Effective collaboration requires not only the right tools but also a culture of openness, trust and transparency. Not-for-profits must actively cultivate relationships with partners and stakeholders, fostering a spirit of collaboration and shared purpose.

Ensure cybersecurity

As organisations become more digitally focused, the importance of cybersecurity cannot be overstated. Protecting sensitive donor information and ensuring the integrity of digital systems is crucial for maintaining trust and credibility. Therefore, not-for-profits must invest in robust cybersecurity measures, including firewalls, encryption and multi-factor

authentication, to protect against data breaches and cyber-attacks.

In addition to technical safeguards, cybersecurity requires a culture of vigilance and awareness among staff and volunteers. Not-for-profits should provide training on cybersecurity best practices and protocols, as well as establish clear policies and procedures for handling sensitive information.

Invest in the right technology

Not all technology investments will be right for every organisation, so it's essential for charities to carefully assess their specific needs and objectives. Whether it's a new finance system, marketing automation tools, or cloud-based collaboration platforms, the right technology can amplify impact and drive efficiencies. However, it's crucial to prioritise investments that align with the organisation's mission and strategic priorities.

When evaluating technology solutions, not-for-profits should consider factors such as usability, scalability and integration capabilities. Assess the total cost of ownership, including upfront costs, ongoing maintenance and training expenses.

Communicate impact

Digital tools can enhance the ability of not-for-profits to measure and communicate the impact of their programmes and initiatives. By collecting and analysing data on key performance indicators, organisations can demonstrate the effectiveness of their interventions and identify areas

for improvement. Clear and compelling data visualisations and reports can help communicate the organisation's impact to donors, partners and other stakeholders. In addition to measuring impact internally, not-for-profits should prioritise transparency and accountability in their communications with external stakeholders.

By sharing information about programmes, outcomes and financial performance openly, organisations can build trust among donors, beneficiaries and the broader community.

"Continuous learning and adaptation are key"

Transparent communication about impact can also help attract new supporters and build deeper engagement with existing ones.

Stay future-focused

Finally, a digital-first mindset requires staying attuned to emerging technologies and trends. Continuous learning and adaptation are key. Not-for-profits should be open to experimenting with new digital tools and approaches, always with an eye on how they can further their mission.

By staying future-focused, organisations can position themselves as leaders rather than followers in the digital landscape. This means actively seeking out opportunities to experiment with cutting-edge technologies.

Exercises

What are the barriers to digital transformation at your organisation? Discuss what the solutions might be:

Barrier	Solution

Which of the following areas of your organisation is most in need of a digital upgrade. Can you prioritise them?

- CRM
- Social media engagement
- Data management
- Digital fundraising
- Internal comms
- Hardware
- Website
- IT provider
- AI
- Finance

Liberty Human Rights

At human rights organisation Liberty, the need to innovate within an individual giving programme is a constant.

About two years ago, we created a digital acquisition programme that had led to our membership growing by 60% in a handful of years. In 2017, we had been on the edge of a precipice. Our acquisition work wasn't bringing in enough new donors to cover natural attrition and we projected that without intervention a collapse in numbers and income would follow.

The programme we created was digital-first, laser-focused on our membership product and highly integrated with our broader campaigning and communications objectives. By streaming fundraising through our campaigning and using petitions and other actions as hooks, we would create a prospect pool to convert to membership.

Using Facebook adverts and working with the petition website Care2, we grew our email list from a little over 30,000 to 227,000. The approach and membership focus worked, but like all programmes it has had to evolve.

In 2024, we are diversifying our focus to incorporate a range of giving products. This recognises shifts in the way people are responding to our content as well as the need to reach a broader audience. We aim to become truly multichannel with our paid social work. This is no easy task and the strategies that we adopt must fit both how users behave on a platform and what they expect from it.

"Membership as a proposition doesn't work for many people"

Changes in behaviour

The clarity and single-mindeness of the approach we developed when faced with the prospect of a programme in freefall, was key to our initial success. But over time, as often happens, aspects of the strategy that were performing well declined in utility. For example, our "daisy-chained" conversion forms on action thank-you pages went from converting at up to 4% to achieving a fraction of this.

Initially a sharp focus on membership worked for us, but over time it's become clear that we need a more diversified approach, capable of targeting different people with relevant asks.

As an organisation, we had for a long time under-utilised our capacity for cash giving. We have done appeals and other

one-off asks, but our focus has been on building and retaining a regular membership programme.

The key shift that we are bringing about now is moving to a position where we can serve people asks that are most likely to lead them to respond, based upon their past interactions with us.

Another fact that has become abundantly clear to us is that membership as a proposition simply doesn't work for many people. We are still converting middle-aged and older people to become members, but the generation below is less motivated by this as a proposition. For us, there is clearly still potential in continuing to target the demographic that we have reached through Facebook adverts. But to be a vibrant organisation, with a sustainable and growing base that donates, acts on our campaigns and amplifies our work, it is essential for us to branch out and appeal to both a younger and more diverse audience.

Reviewing the focus

Our approach to ads on Meta has been boiled down to a simple formula. In essence, our ads have been an eye-catching call to action presented with a still image designed to stop people scrolling. The action is as quick and straightforward to take as possible and leads to a daisy-chained conversion ask.

Like other aspects of our programme, this too has required review. Paid social is effective when it speaks to the reason a person is on the platform. Across the advertising spaces available on Meta, be it Instagram story ads, Facebook video ads or whatever – it's clear that what is being served to the user needs to fit in with the type of content they are seeking.

We have sought to create ads, content and other digital assets that resonate with how people use a particular platform. Simply put, as user behaviour develops and evolves on these platforms, so must our approach.

Alongside serving ads related to hand-raiser actions and petitions, we have developed a digital asset that has become a key acquisition tool for us – Liberty's Practical Protest Guide.

The guide is a downloadable PDF, optimised for use on a phone, that covers key things to think about if you are protesting. From dressing comfortably to what to take with you and crucially what to do if you are approached by the police. It is a product that will be of genuine use and interest to the audiences that we are targeting.

By Andrew Taylor-Dawson, development manager at Liberty

Exercise 1

What are your main acquisition channels?
How many regular donors do they bring in each year?

Channel	Donor acquisition %

Exercise 2

Which digital platforms would be the most useful
to your organisation for a donor acquisition campaign?
Put them in order of most to least potential:

Facebook ◯   TikTok ◯   Instagram ◯

Owned website ◯   Third-party websites ◯

X ◯   LinkedIn ◯   Other _____

Using what you have learned from the feature and case study, check your progress below and use the links for further examples and guidance.

Checklist

☐ Conduct 360 review of existing digital capabilities

☐ Identify strengths and weaknesses

☐ Cultivate a digital culture

☐ Engage with stakeholders

☐ Identify partners

☐ Set clear budget and objectives

☐ Invest in tech and tech support

Notes:

Resources

Case studies

Liberty Human Rights
www.libertyhumanrights.org.uk
Learn more about Liberty's multichannel approach to digital acquisition

Prostate Cancer UK
www.tinyurl.com/3rw79mzu
Prostate Cancer UK recently underwent a digital transformation. Read about it on civilsociety.co.uk

Bristol & Weston Hospital Charity
www.bwhospitalscharity.org.uk
Learn more about Bristol & Weston Hospital Charity strategy and fundraising

Guidance:

TechSoup
www.techsoup.org
TechSoup supports not-for-profits, charities, and libraries by providing access to donations and discounts on software, hardware, and services

NCVO
www.ncvo.org.uk/help-and-guidance/digital-technology
Practical step-by-step guidance to make the best use of digital tools and processes to help your charity, organisation or community group

Charity Digital
www.charitydigital.org.uk
Useful guidance and blogs on all things digital for charities