



Sector insights on regular giving during the coronavirus pandemic, with lessons for the future



The coronavirus pandemic has had a far-reaching impact on the not for profit sector. The restriction of movement has affected everything from service delivery to funding and fundraising, working practices and employment, just as demand for services has soared.

Vital fundraising channels such as face-to-face and events had to stop and many charities were unable to run activities they were counting on to reach new supporters and raise much needed income for the year ahead.

As a result, it is estimated that the sector could see a £12.4bn shortfall in income for 2020, with some 84% of charities reporting a decrease in their total income during lockdown<sup>1</sup>.

Contributing to this, some regular supporters have found themselves needing to cut back, facing uncertainty over jobs and personal finances. Additionally, new supporter sign-ups have faltered with charities unable to fundraise across all channels. However, the public's renewed sense of solidarity and charitable spirit has also seen online donations spike, demonstrating a will to support.

This report focuses on regular giving specifically. As the lifeblood for many charities, regular giving can provide a reliable and sustainable income stream that can also cushion a charity in times of crisis. As payments partner to the Chartered Institute of Fundraising, Rapidata has continued to monitor and report regular giving trends throughout the coronavirus crisis, updating both the charity sector and trade bodies liaising with government.

In June, we conducted a charity survey to learn more about the impact of coronavirus on regular giving, and the implications for the future. Here we feedback the responses and share our insight, as well as case studies and thinking from our guest charity experts.

We examine how charities can best work to mitigate the effects of this crisis on regular giving, how to build resilience in this area of fundraising, and to protect it both now and into the future.

We hope you find it useful.

<sup>1</sup> Coronavirus Impact Report



The UK's lockdown came into effect 16th March 2020, halting face-to-face fundraising, events and other income generating activities for charities. With people's finances and job security on the line, regular giving behaviour began to change. The Direct Debit cancellations rate jumped to 3.09% – the biggest swing from February to March ever recorded – and supporter acquisition declined.

While cancellation rates returned to their usual level in April, new supporter sign-ups remained low, with less than half the number of regular supporters recruited than during the same month in 2019.

In our latest charity survey, we asked charities what actions they took within the limits of lockdown to protect and grow regular giving:

- 67% of respondents changed how they communicate with regular givers. Many increased their focus on stewardship, turning to digital channels and the telephone to thank supporters and reinvigorate relationships.
- Some pre-empted cancellations by offering payment options such as skip, holiday or reduced gift.
- Use of digital skyrocketed. Social media and email saw the biggest increases, then online advertising and online virtual events.
- Social media, additional impact reporting and thank you mailings were the top three activities used to tackle attrition.
- The most successful channels recruiting supporters during lockdown were social media, email and online advertising, while the top three channels for stewardship were email, direct mail, and telephone.

## Key findings for the future:

- The coronavirus crisis has prompted a renewed recognition of the importance of regular giving as a sustainable and reliable income stream for charities.
- Similarly, the crisis has magnified focus on a supporter-centric approach for deepening relationships and protecting regular giving.
- Lockdown measures have accelerated charities' increased use of digital channels and reinforced the need for digital transformation to be written into every charity's strategy.
- We see a shift in fundraising practices with around half of respondents expecting to continue using channels they hadn't used before lockdown.
- Three-quarters plan to continue their increased use of digital but for some a lack of skills, resources, and budget remain barriers to its uptake.

With much that charities can do to prepare and mitigate against future crises, Rapidata has drawn up a useful checklist of practical steps to take on page 18.



Since 2003 Rapidata has monitored donations data in the charity sector's regular giving benchmarking programme, publishing *The Charity Direct Debit Tracking Report*. The programme provides a broad view of regular giving trends and a unique benchmarking resource for charities, sector bodies and researchers around the world.

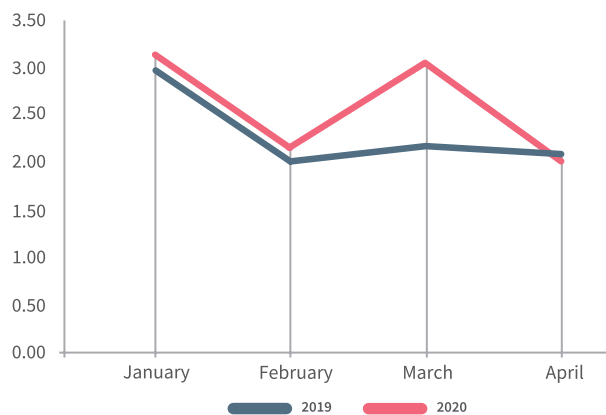
The coronavirus pandemic and sudden lockdown in the UK gave many individuals concern about the security of their current and future income. Rapidata's continued analysis during this period revealed that March unsurprisingly saw an immediate high jump in regular giving Direct Debit cancellations.

Rising from February's 2.16% to reach 3.09%, the cancellations rate was 41% higher than for the same month in 2019. It also marked the biggest swing from February to March ever recorded.

The combination of financial concerns and no face-to-face activity also meant many charities saw a steep decline in new supporter sign-ups. By the end of March, this dropped to 58.17% lower than the same period in 2019.

April however, saw Direct Debit cancellations rate returning to the more usual level of 2.04%.

#### Direct Debit Cancellations Rate (%)




New regular giving sign-ups remained low during April however, at 54% below the same month in 2019 – likely reflecting the continued absence of key recruitment channels, events and face-to-face fundraising.

Environmental charity ClientEarth's experience during these months was typical of this pattern. Relatively new to regular giving, it favours email for active recruitment.

**Dipti Patel, ClientEarth's Supporter Engagement Officer says:**

“We saw a higher rate of attrition in March, and a significant drop in the number of new sign-ups, which we also attribute to us not asking, sending out fewer emails at this time. From April, things bounced back and the attrition rate fell so we were able to recommence our usual activity level halfway through the month with response rates coming back up.”

A person wearing a brown coat and dark blue leggings is holding a blue surgical mask by its white elastic straps. The background is a blurred outdoor setting. A white rectangular box is positioned at the top left of the image.

“The pandemic is not the first time the charity sector, and specifically regular giving, has had to adapt to change but never before have the challenges come so thick and fast. At a time like this, the sharing of experiences and insight gained is absolutely critical in helping the sector learn and respond – and come back stronger.”

**Scott Gray, Rapidata lead and head of payments at The Access Group**

In June we invited charities to share their experiences of regular giving during the coronavirus pandemic and how they have adapted their fundraising.

We asked what they had experienced and how they reacted during lockdown as well as in the initial recovery phase of lockdown easing. What strategies they have implemented to drive donations, mitigate attrition and protect this income stream. We also asked for their thoughts on the future of regular giving.

We received 87 responses from charities of all sizes and across a wide range of causes. The highest proportion came from London and the South East, followed by Midlands and South West, with causes ranging from children and young people, to hospices, religious causes, animal welfare, and the environment.



Face to Face fundraising stopped

67% of charities changed how they communicate with regular givers

71% increased their use of social media

62% increased their email activity

46% increased their use of online advertising

46% increased online events



increased their use of telephone

16%

of respondents said they turned to online 'virtual' events for supporters for the first time.



Best channels for supporter stewardship

32%



Email

19%



Direct Mail

18%



Telephone

Best channels for support recruitment

24%



Social Media

20%



Email

19%



Online Advertising

Social media, additional impact reporting and thank you mailings were the

TOP 3 ACTIVITIES

for managing / reducing attrition during lockdown



increased telephone calls to thank supporters and reinvigorate relationships



contacted supporters to pre-empt cancellations by offering alternatives



contacted supporters who cancelled to try and change their mind

49%

of respondents say they expect to continue using channels they hadn't used before lockdown



75%

expect to continue their increased use of digital



30%

will continue to use virtual conferences more for supporter events



23%

would like to make more use of digital but lack the skills or resources, while

17%

are impeded by a lack of budget



Insights from our survey and interviews have highlighted several significant shifts in regular giving fundraising during the coronavirus pandemic.

Most notably, over two thirds of charities have changed the way they communicate with potential and existing supporters. In fact, many of our survey respondents have made changes to both their acquisition and stewardship strategies; changing or intensifying activity or channel use, and shifting budget.

As the cancellations rate quickly bounced back from an initial high-jump in March, this also brought a renewed recognition of the importance of regular giving in a crisis. When key fundraising channels, such as events or face-to-face, are impacted or stopped altogether, an existing regular income stream can provide crucial time to review strategies and adapt.

Likewise, charities reported an increased recognition in the role stewardship has to play in retaining donors and nurturing supporter relationships

## Changing channel use

A common theme among respondents to our survey is the rise in uptake of digital, with many charities venturing into channels that were new to them or significantly increasing their activity here.

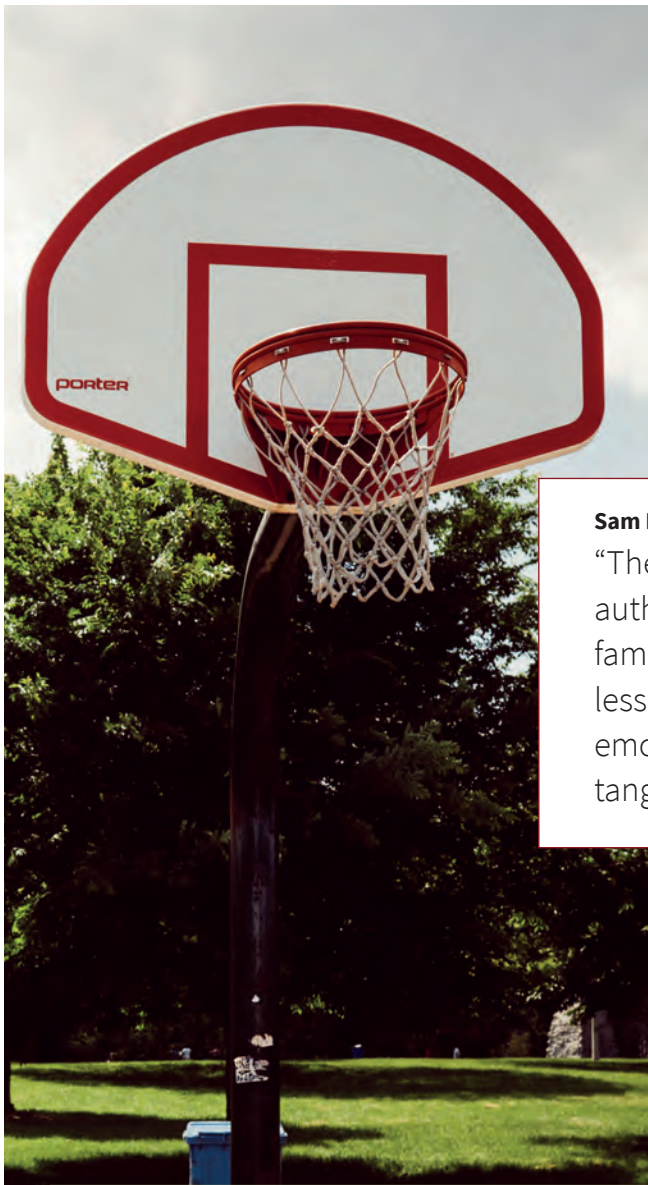
Major contributors, of course, were that face-to-face fundraising activity, so important for supporter acquisition, and mass participation fundraising events that usually generate significant income were off the cards. But, with the public homebound, online usage soared, with supporters more receptive not only to digital content, but to TV, telephone and mail. This has driven many charities to diversify and redirect budget to these lockdown-friendly channels to reach out to supporters.

With DRTV and digital its primary acquisition channels, WaterAid saw a rise in supporter acquisition during lockdown.

### **Marcus Missen, Director of Communications and Fundraising explains:**

“This combination performed really well for us pre pandemic and, with some interesting new cross-channel approaches, has strengthened during the pandemic. We’ve invested in driving consideration and activation via a combination of ‘hero’ TV ads and ‘atomised content’ across increased digital. TV has seen massive viewer numbers, but cost has been down because no one is advertising, so we benefitted from reduced media costs and this captive audience of people at home feeling dis-empowered and wanting to do something to help.”

Overall, charities most increased their use of social media and email according to our survey, with online advertising and online virtual events next in line. With many charities looking for viable alternatives to their previously scheduled in-person events, online virtual events also saw the biggest increase in first time use.



Investing in stewardship, deepening supporter relationships and managing attrition rates was front of mind for many charities. Respondents indicated that social media, additional impact reporting and thank you mailings were particularly important for this purpose during lockdown.

Starlight Children's Foundation's urgent appeal saw the charity create a short film to share through social channels explaining both the need for its services and the impact on children who are seriously ill, through real hospital footage.

**Sam Butler, Head of Public Fundraising, Starlight Children's Foundation, says:**

“The most important thing for our appeal was the level of authenticity. Our cause is so connected to Covid-19 with families having to isolate, and children on wards receiving less visits from parents. This meant there was a very strong emotional element to our appeal and something very tangible – if you can give us a donation, we will deliver this.”

For recruitment of new supporters, social media was again the most successful channel for our respondents, showing a dual function with its role in stewardship, followed by email and online advertising.

Certainly, ClientEarth's usual acquisition activity, which sees it engage via email before asking for support stood it in good stead for the pandemic.

**Patel says:**

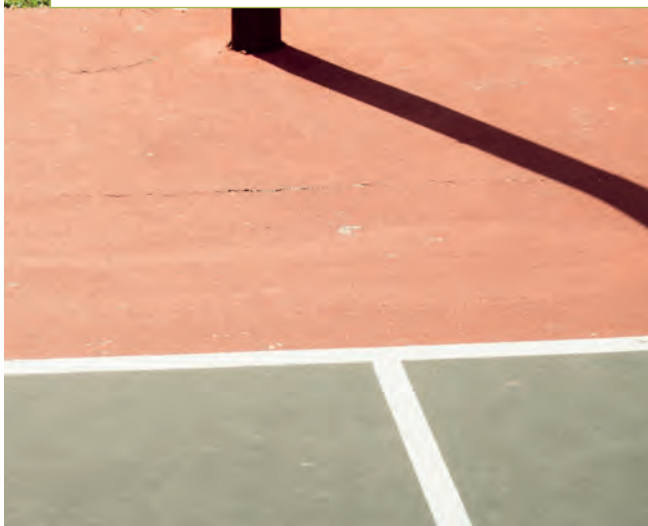
“We start people off with a petition advertised on social media and Google, with the option to sign up to an email list. Then after several emails with updates on our campaigns and activities, we send a donate ask. It's definitely about genuinely engaging and convincing people about the cause before asking them to donate.”



Email has also proved a strong channel for communicating with existing supporters – overall, respondents to our survey indicate that it's the most successful channel for stewardship, followed by direct mail, and the telephone.

And, while last year, sector research<sup>2</sup> revealed that 52% of charities did not yet have a digital strategy, the coronavirus crisis has accelerated digital uptake with charities making huge strides in recent months.

However, barriers do remain for charities wanting to use digital channels. Our survey found lack of skills, resources, or budget to be problematic for almost a quarter of respondents.





## The future for regular giving

Looking to the future, charities expect to become more and more digitised, building in extra investment, time and resources. Most say they hope to broaden their use of digital channels for recruitment and stewardship activity.

Certainly, the digital progression seen during lockdown by charity and consumer alike won't be undone, meaning charities very much need to keep up to stay relevant and retain support. It's encouraging then to see that around half of our respondents expect to continue using channels they hadn't used before lockdown, with nearly a third for example expecting to use virtual conferencing more for supporter events.

## Focus on stewardship

While stewardship and engagement are much discussed within the sector, this crisis has really served to bring home the difference doing it well can make, with charities launching a range of activities to illustrate to supporters just how valued they are and to boost retention.

Some increased telephone calls to thank supporters and reinvigorate relationships, while others contacted supporters to offer alternative options to cancelling their regular donation payments if they felt under financial pressure. Others still contacted supporters who cancelled to try and change their minds, or launched surveys to understand how supporters were feeling and find out exactly what they needed and wished to hear about.

Pancreatic Cancer UK saw around double its usual rate of attrition in the first week of lockdown and a higher than usual level of unsubscribes among regular supporters. In response it took to the phone.



### **Shannon Pinder, Pancreatic Cancer UK's Senior Individual Giving Manager says:**

“We went into high touch communications with the phone, using personal stories to talk about the pandemic and illustrate how the need was greater than ever. We also offered a payment holiday as an alternative to leaving. While we didn't see much take up for that, over a third of those we spoke to upgraded. Through this approach we received a much more positive response than if we'd kept these supporters on the normal charity journey.”



Coming out of the lockdown, stewardship will continue to be particularly front of mind with the economy looking set for another economic recession. The impact of a prolonged downturn on donor numbers will see charities increasingly turning their attention to how they can encourage greater support and loyalty from those still able to give.

### **Nick Pride, Director of Individual Giving and Loyalty, Marie Curie, says:**

“In the medium term, there will be even more pressure on people's own finances and this will affect corporates, philanthropists and individual givers alike. There's capacity however for charities to be connecting with supporters over the services they deliver and their vision for the future. We have to do a much better job at using insight to build supporter engagement, then there will be a positive financial outcome. We've been talking about relationship fundraising for years – we've got to make that a reality”



When times are tough and job security and finances thrown into disarray, people will of course carefully consider where and how they spend. To compound this another economic recession is expected, meaning there are likely to be further challenging times to be faced in the months ahead.

At such times charities may fall down the personal priority list – just at the very time they need the public’s support the most. But our experiences of previous crises, including the global recession of 2008/9 and the media scandals and sector reforms of 2015/16, showed us that people don’t forsake the causes that mean something to them, that they want to support and continue to do so during difficult times. The key then is to draw on experience to mitigate the risk of attrition. It’s imperative now that charities are proactive and plan ahead for these periods using the lessons learned from previous crises, including what these past few months of the coronavirus pandemic have taught us.

## Recognition and investment

The pandemic has also thrown into stark relief just how critical regular giving income is for many charities, the fact that it can provide an essential fundraising cushion and give time and space for the charity to review, adjust and react in a crisis. Charities are giving renewed focus on this area to ensure regular giving is nurtured and protected.

Yet it requires greater recognition, right across the organisation with buy in from the board. Sharing the difference regular giving support makes to the charity and its beneficiaries, and their role in bolstering this can help here, and some charities are already reporting greater internal engagement during the coronavirus crisis.

More thought has to be given to how we grow regular giving as we move through the recovery period and beyond. A supporter-centric approach will be key, taking the time to find out what supporters need and how.

**Amy Oberholzer, Head of Individual Giving, Prostate Cancer UK comments:**

“The need to truly engage with supporters and remain relevant is even more important than it was before. It’s not enough to simply thank and then build up to another ask, it’s about truly listening to the needs and interests of your loyal supporters, why they’re choosing to support your cause and how they prefer to engage. More bespoke offerings will need to be developed and the ease of giving needs to be frictionless, no matter how an individual chooses to support.”

Charities emphasise the need to communicate the importance and value of people’s support by showing the impact on beneficiaries. They highlight too the advantage of giving supporters choice in the way they can give, as in the case of Marie Curie when it contacted supporters to ask for additional help during the crisis.

Marie Curie  
Cancer Care



With face-to-face as Marie Curie's main channel for recruiting regular givers and lottery players, acquisition came to a sudden halt with lockdown, as did its annual Daffodil appeal. However, the charity saw strong support from existing regular supporters by changing a campaign to offer a range of giving choices.

“The lockdown hit right in the middle of the main collection period for our flagship campaign: we'd had a great start, but the inevitable outcome was a considerable hit on our income.”

**says Director of Individual Giving and Loyalty, Nick Pride.**

With no opportunity to repurpose any of this activity, it launched an emergency appeal and also turned to the phone. Adapting a campaign to increase regular givers' level of support that was already scheduled, it asked if people could increase their giving either long-term or temporarily to help it through the coronavirus emergency, and also gave the option to downgrade rather than cancel if they had financial concerns.

**Pride says:**

“We hadn't offered this range of choices before. This time, response rates were nearly 20% better than the previous campaign, and average gifts were 50% higher. Just a handful took the option to downgrade, and about a twelfth of the upgrades were for a six-month period to provide additional support through the pandemic.”

## Diversification

The sudden halt of face-to-face and event fundraising in particular, and the impact of this, has highlighted just how big a role these channels play for many charities in recruiting new supporters and raising income.

Equally, it has shown the importance of using a broad mix of activity to avoid over-reliance on any one channel. It's critical then that charities reassess their channel use to ensure they are flexible and able to adapt their activities, should another crisis strike.

And, while digital channels have played a key role in both recruitment and stewardship during the crisis, it also highlights the important role that other 'traditional' fundraising channels play in regular giving outreach, awareness building, recruitment and engagement. This was re-emphasised for Prostate Cancer UK after the pandemic halted many of its usual activities.



With many activities paused due to lockdown measures and health and safety considerations, Prostate Cancer UK had to develop alternative plans to deliver its acquisition activities, alongside plans to retain existing supporters.

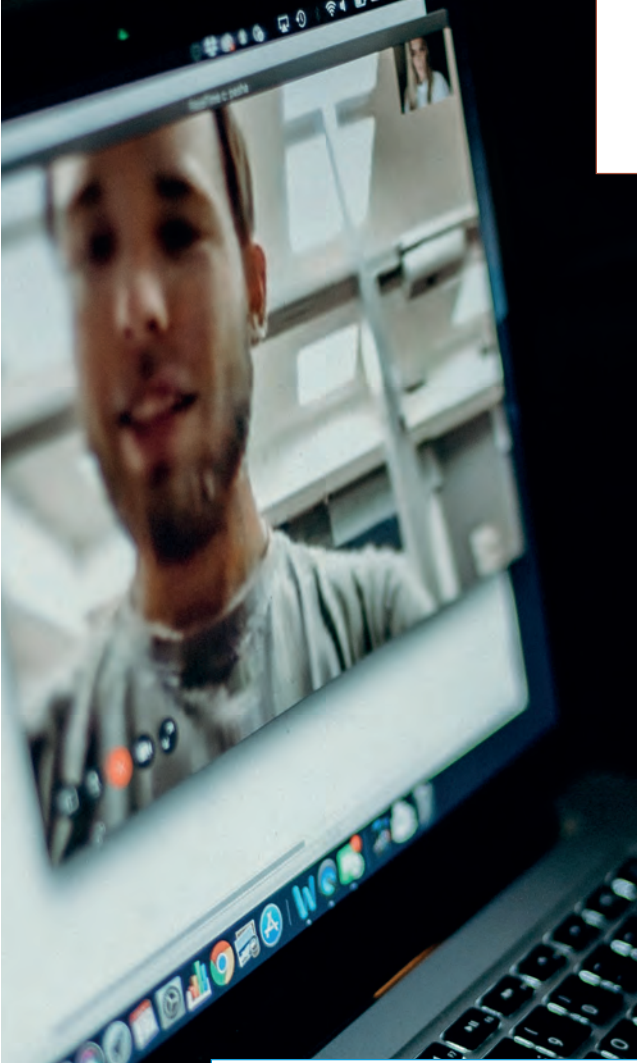
The charity emailed all existing supporters within days of lockdown to ensure they knew where to access support or additional information. Another more bespoke email went out to regular givers, including information about their Direct Debits and options to reduce or pause for a period of time. A telephone campaign was carried out for those the charity was unable to contact via digital means.

A few weeks later, an emergency appeal followed. Later still, a number of virtual and at home activities launched – to generate income and engage a wider group of supporters. Early into lockdown the charity saw a spike in attrition, but the curve flat-lined and resumed pre-Covid-19 levels. Whilst these measures have enabled Prostate Cancer UK to continue to generate voluntary income during the pandemic, the impact on its sporting events and community activities has been significant and, therefore, it expects a 48% drop in income this year.



### Head of Individual Giving, Amy Oberholzer says:

“More of our focus is now on retaining existing supporters and converting those who have engaged in the past – into financial supporters through a combination of AI, a variety of campaigns, across a mix of marketing channels. For regular giving, telephone continues to be king – replacing our direct dialogue channels in the short term and letting us engage directly with supporters. This is followed closely by digital. We’ve found that a greater number of people are accessing email and social channels than before lockdown, with more emails opened and posts engaged with.”

A photograph of a man with a beard and short hair, wearing a light-colored t-shirt, appearing on a video call screen. The screen is part of a laptop, with the macOS dock visible at the bottom. The background behind the man is a blurred office or library setting with bookshelves.

“Consumer uptake of digital has only hastened with the pandemic and as reliance on these channels increases, so too expectations. Giving greater control to supporters: both over the communications they receive and the management of their donation payments through these channels is not only advisable for retention, it is critical.”

**Scott Gray, Rapidata lead and head of payments at The Access Group**

Moving forward, charities will need to have a strong presence online, in terms of dynamic websites, email campaigns and digital engagement with supporters through the main social media channels of *Facebook*, *Twitter*, and *Instagram*, and now *TikTok* and the emerging channels to come.

With consumers already fully embracing contactless and digital payments elsewhere, it will be important too to make it easy for people to start giving online. Specifically, charities’ own websites saw a massive increase in giving during the first months of lockdown, some reaching tenfold previous giving levels and then levelling at twice the usual rate during May<sup>3</sup>. Those charities without optimised donation pages on their websites will have undoubtedly missed out. It’s an absolute must for every charity’s website to offer donation pages, for both one off giving and online Direct Debit mandates for regular giving.

Digital tools, such as video conferencing, will also certainly continue to have their benefits with supporters potentially uncomfortable about returning to large events even when lockdown is fully lifted. And while we may not be ready for them to replace face-to-face meetings altogether, from a charity’s perspective, the ability to hold individual meetings through to mass events, and to reach large numbers of people across the world at minimal investment is a real positive.

**Simon Baines, Managing Director, Not for Profit at The Access Group, says:**

“The coronavirus pandemic has really highlighted the necessity for charities to have a strong presence online. Those behind the curve may have lost out on vital opportunities to engage during lockdown and it’s all the more important now that those charities give focus to their digital transformation to be able to compete and not get left behind.”

Digital technology is constantly changing and evolving, meaning digital transformation is very much a journey. As such, it must be written into charities’ strategies, with a dedicated focus on working to adapt, adjust, and introduce new technologies as they come in.

To support the sector’s digital transformation, a free download on the topic: *The Digital Maturity Playbook for Not for Profit Organisations*, has been created by The Access Group. This provides an in-depth guide to the four key fundamentals of digital maturity: disruption, communications, technology and measurement, and how to work out which elements matter most to your organisation.

<sup>3</sup> Website giving levels reported by The Access Group



The pandemic saw Starlight Children’s Foundation launch an urgent appeal that included digital activity together with the usual mail component, for the first time. The direct mail piece was a stripped back version of its usual campaigns due to the urgency.

A frontline doctor (and Starlight Trustee) explained in a short video how seriously ill children were feeling isolated in hospital with family visits much reduced. It also showed children and their nurses and families playing together on their wards, explaining how people could help by donating towards toys and games for isolation play packs. Going out on Instagram, Facebook and Twitter, the appeal was retweeted by celebrities including Zoe Ball and also made more prominent by the charity using its Ad Grant. Mail also went out, including to past supporters under legitimate interest.

**Sam Butler, Head of Public Fundraising says:**

“We were very mindful of the fact that the appeal was stripped back as there was no time to build the usual postal appeal pack and using digital was also a step into the unknown in terms of how well people would respond to us.

“However, we were very fortunate in having an agency offer to work for us at very reduced rates, which meant we could also put more money into online advertising, and we received organic growth from celebrities retweeting our post. The digital integration certainly helped to amplify the urgent need for our appeal, increasing awareness of Starlight’s work supporting frontline NHS workers. To date, the appeal’s results have more than doubled the original target!”





While attrition rates quickly fell from their jump in March to more usual levels, the months ahead may continue to be a bumpy ride. With the longer-term impact of coronavirus taking its toll and an expected global economic recession on the cards, it's all the more important to be keeping a close eye on your regular giving.

It's good to see through our survey, a number of charities offering regular givers choices over their payments during this difficult time. Providing options for them to change their donation amount or payment date online, and pause or reduce their gifts could just give them the control and security they need to avoid having to stop giving altogether. It could also be more cost-effective than increasing spend elsewhere on reactivation campaigns.

Another useful tool is benchmarking for driving results, giving charities a standard with which to both measure and target against. In 2017 Rapidata launched the Cancellations Average Benchmark, a charity standard recommendation of 3% for charities to aim to keep their attrition rates at or below. While fundraising activities and supporter bases can differ widely, it's a target that is achievable for most organisations.

Better communication and engagement are also important here. Being open and transparent, and showing people what you're doing and why, what their donations have achieved and the impact on beneficiaries will help to foster engagement and show supporters the difference their support is making.

Taking the time to find out what your supporters are interested in, as well as their communication preferences, is also a key part of this.

**Pancreatic Cancer UK's Pinder says:**

“We had a lot of assumptions about what supporters think and want but although we try to be supporter-led, we didn't actually know. We learnt a lot from sending out a survey, specifically that they want to hear about what we're doing and the people we're helping. We know now that we need to be supporter and beneficiary led because as an institution we're here to help people.”

Its survey also led to Pancreatic Cancer UK signing up 100 new regular supporters.



During the pandemic, with media consumption increasing and the charity's fast action to adjust campaign messaging, acquisition has risen for WaterAid while retention has also remained strong.

Marcus Missen, Director of Communications and Fundraising, attributes this to a captive audience for TV and digital with more people at home, many feeling a heightened sense of empathy with others and a desire to help. Adding to this, reduced media costs were available as many advertisers cut back.

“As well as increasing investment in media, we’ve invested in new approaches such as driving consideration via ‘hero’ TV ads and ‘atomised content’ across digital channels using the hashtag #bringwater. We’ve also upped the volume of digital content being published. All of which helps cross-channel response rates. The mix has increased engagement and provided a value exchange to drive consideration and activation, and uplift fundraising asks. Essentially we’ve leveraged the acceleration of digital during lockdown to learn and shape what we do beyond lockdown.”

In addition, one particular direct mail campaign played an interesting role. The charity had an upgrade mailing already in production and scheduled for a few weeks into lockdown. The fundraising team acted quickly to adjust the covering letter to a stewardship message instead.

“We thanked people for their dedicated support, updated them on what we were doing, and wished them well. But at the top of the letterhead, because it had been pre-printed for the original mailing, it did mention the upgrade. In the letter, we explained openly that we had changed our original plans due to the Covid situation. We found that it landed very positively with supporters, and many people did upgrade. Since then we have continued to update our supporters – it’s an approach that’s central to our strategy.”







“While the past few months have certainly been wrought with challenges for the charity sector, it’s been immensely encouraging to see regular supporters mostly sticking with their chosen charities, despite the broad impact of Covid-19.

Many lessons have come out of this pandemic so far, including, as evidenced in this report, recognition of the need for renewed focus on regular giving and for real supporter centricity.

When times are tough, having the backing of a dedicated supporter base providing regular monthly income can help charities ride out the storm. It provides valuable breathing space to look at other areas of concern while knowing there is money still coming in the door.

It’s important then that charities work to protect this, and it’s clear that this is already happening in many cases. We’ve seen the uplift in the use of digital channels during the pandemic and charities trying channels and approaches for the first time. Also, greatly increased supporter stewardship with many charities shifting and adapting strategies to change campaigns to ensure they are appropriate, taking to the phones to engage with supporters, and offering a variety of payment options for those concerned about their finances.

To protect regular giving income for the future it’s going to be hugely important to learn from our experiences of this pandemic, and from the crises we’ve come through before, to really focus on supporter-centricity and strategic diversification. To help charities we’ve drawn up what I hope will be a useful checklist of points to consider as they adapt their own regular giving strategies.

As always, it would have been impossible to put this report together without the help of our expert contributors. We are immensely grateful to them for sharing their valuable insights and opinions, particularly at such a challenging time.”

**Scott Gray, Rapidata lead and head of payments  
at The Access Group**

1

### Recognise

Is regular giving's role and importance recognised across your organisation and by your board? Build engagement organisation-wide by showing people the difference it makes to the charity and its beneficiaries, and their role in this.



2

### Digital

Is digital transformation written into your strategy? Digitisation has accelerated during lockdown, meaning that this journey needs to be properly recognised, invested in and resourced to avoid your organisation being left behind.



3

### Communicate impact

Are you adequately communicating your impact and the difference your regular supporters' gifts are making to your cause and beneficiaries? If people know what their money is achieving and feel valued they're more likely to keep giving.



4

### Value

How do you say thank you? A phone call or handwritten card at trigger points like a giving anniversary can celebrate the relationship, show the supporter they are valued, and build loyalty.



5

### Business continuity

Are you prepared for another crisis? Whether that is a health crisis, the next recession, or fire, flood or snow! The coronavirus pandemic will have given you valuable experiences; it's crucial to document lessons learned during a crisis to help you through the next, and to regularly review your contingency plans and policies. Other crises and recessions will happen, so record your response to Covid-19 to draw upon in the future.



6

### Diversify

Are you using a diverse range of channels for acquisition and stewardship? This will help you to maximise reach and mitigate the risk of problems if one falls by the wayside.



7

### Supporter choice

Do you offer regular givers choice and control over their payments? Consumers increasingly expect it and it can also make the difference between losing and retaining a supporter in a crisis.



8

### Listen

Are you regularly communicating with supporters to find out what they want to hear and how they'd like to help? Supporters need to feel listened to and have a level of control in a two way relationship.



9

### Monitor against benchmarks

Are you monitoring attrition? Benchmarking your Direct Debit cancellations rate will help you keep tabs on this, giving you targets and aiding early identification of problems for resolution. Rapidata has set industry standards for both Direct Debit cancellations and no-show rates



10

### Trial and test

Are you still testing? Under the extraordinary circumstances of this pandemic, it has never been more vital to keep testing: from new channels, to new approaches and audiences, so keep trying and don't fear failure.

