



Community Foundation for Tyne &  
Wear and Northumberland -

Online donor engagement strategy  
and implementation

*'We needed to find digital solutions to strengthen the relationship that we could also use post-pandemic as we looked to enhance our engagement and sharing impact with donors'.*  
Sandra King, Community Foundation for Tyne & Wear and Northumberland

### Our digital transformation challenge

Like many businesses during Covid-19 we have had to adapt to a new way of working where in person engagement is currently unavailable. This is an issue for an organisation and movement that relies heavily on personal interactions to build relationships. For the charitable organisations we support we were able to quickly and effectively move much of our support offer online. Our grant system remained open online and our training and support offer moved onto Zoom or Teams. One benefit of the pandemic was that it sped up plans to deliver an online programme to improve access to our sector support offer. It also encouraged new partners to work with us as they too looked for new ways to engage and 'give back' to our communities. However this relationship was largely transactional.

At the start of the pandemic our donor engagement was also largely transactional. We moved quickly to set up a Covid fund and donors reacted to it generously. They weren't as interested in engaging wanting us to get grants out to those that needed it quickly. As the pandemic persisted though we needed to move from reactive to pro-active engagement and re-discover the more nuanced donor relationship we would normally offer. We needed to find digital solutions to strengthen the relationship that we could also use post-pandemic as we looked to enhance our engagement and sharing impact with donors. As with our sector support offer this would also speed up plans for more digital engagement with national and international donors.

### Our solution

Having identified donor engagement as an issue in Autumn 2020, we put together a draft plan following conversations with fellow UK based community foundations. This included surveying donors on what they wanted, running webinars and sharing video from our grantees. The timing of the ECFI Action Learning on digital transformation was perfect to

test this plan out with others and potentially adapt it. We had a donor survey on our work plan pre-pandemic as we wanted to change the way we shared impact with donors. Like our work with charitable organizations, the pandemic sped the process up and the survey was given a focus on donor engagement. We aimed to get a 40% return rate and achieved 41%. In the survey the donors gave us an insight in what they wanted us to share with them and how. We were then able to feed that into the rest of our plan.

The next part of the plan was to test out moving an existing donor engagement event online. Our annual 'Welcome to Philanthropy' session brings our newest donors together to talk about philanthropy and the issues facing our communities before boarding a coach to visit organizations tackling those issues. Unable to do this we brought everyone together online. To break up the session we used a mixture of presentations from our team and charitable organizations, discussions, breakout rooms and a Zoom poll to vary the experience as best we could. The session was recorded for those that could not attend and the feedback was excellent.

The final part used the feedback from Welcome to Philanthropy session alongside comments from the donor survey to deliver our first ever 'Giving Insights' session<sup>1</sup> with our CEO Rob Williamson. This session was based on donor's interest in hearing about how our communities fared during Covid and what the future looked like. The session again used a mix of styles to keep donors engaged and feedback was largely excellent with some useful suggestions for future events. One was that we shouldn't use a webinar feature where attendees were hidden from each other.

### Takeaways from the action learning process

Overall, our plan changed very little as a result of the learning set. The advice from partners was that we were largely on the right track which gave us confidence in our own expertise and abilities. There were no magic wands though we did see some useful tools we may use in the future. What it did do was strengthen the framework and give the plan a fixed timeline ensuring we concentrated on its delivery. This was important because if we hadn't kept focussed on addressing the challenge, we risked donor dissatisfaction and the risk of being seen to be behind the digital curve. We also would have lost the opportunity to try something different during the pandemic. Audiences have been more forgiving!

### Issues that remain unresolved

We still have a challenge around 1 to 1 interaction with donors especially with grantees in the most efficient and effective way for us and the grassroots organisations when we have 300 donor advised funds. We still need to organise videos of existing donors for our online

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<sup>1</sup> Giving Insights with our CEO Rob Williamson. <https://www.youtube.com/watch?v=LbX0VYtSAu4>

engagement, promotion and communications in order to help us to find new donors and grow philanthropy.

What we have is a better blended offer of engagement for existing and potential donors going forward. A better offer for new and existing donors outside of the region be they elsewhere in the UK or internationally. We hope it will help us further open up ex-pat donors who may otherwise feel it is hard to engage with us and see the impact of their giving. We also have an expanded network across Europe that we can call on and we can help with our experiences. Whilst we didn't find new solutions to our own problems we heard about a range of other issues and solutions that we may benefit from in the future.

Find out more about the Community Foundation for Tyne and Wear and Northumberland:  
<https://www.communityfoundation.org.uk/>