

## Chat Summary: Room 2 Community Fundraising Conference 2026

I found one genuinely good piece: Davinia's WhatsApp communities point, and the lovely peer-shared "small thank-you gift" tip thread (biscuits, tea, hot chocolate, branded items) which is a great example of peer-to-peer practitioner tips. Now I have everything needed for Room 2.

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## FEV148 | Community Fundraising Conference 2026 — Room 2 Chat & Session Summary

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### Session 1: From Community Donor to Loyal Supporter — Davinia Batley, Champion Fundraising

This session introduced a "five pillars" framework for deepening supporter loyalty: **recognition, connection, hope, belonging, and agency**. The session unfortunately experienced some technical playback glitches, but the host followed up with the speaker afterwards.

**Key tip shared:** WhatsApp communities can be a genuinely powerful, low-cost way to build belonging — one fundraiser saw six unsolicited new sign-ups to an event after just one person asked about it in their group.

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### Session 2: Your Time-Saving Matrix — Amber Satterthwaite, Blue Cross

This session covered how Blue Cross redesigned their stewardship approach using a tiered supporter matrix, balancing consistent care for all supporters with realistic team capacity.

#### Questions asked and answered (live and in chat):

- **Does limiting supporters to set tiers risk stopping them giving more in future, by boxing them in too early?** — This was a real concern going in, but in practice the team try not to take tier assumptions too literally — if a phone conversation reveals a supporter has wider networks or bigger ideas than their

initial plan suggested, the team draw that out and adjust rather than sticking rigidly to the tier.

- **Have you found that automated stewardship pushes people away, since it can feel less personal?** — It can have that effect, but using personalisation within automation (e.g. inserting details the supporter has already shared) helps bridge the gap between automated and personal contact.
- **Are there any events or community activities you find particularly hard to steward effectively?** — Supporters with very high expectations for the level of support they receive (e.g. wanting multiple staff and animals at a small bake sale) are the hardest to manage — being upfront about realistic levels of support from the outset helps manage this.
- **Do supporters ever move down tiers, not just up?** — Yes, if an event isn't generating the expected impact, support is scaled back accordingly, though the automation system doesn't allow this to happen until natural review points.
- **Can supporters change which staff member manages them as they move up tiers?** — No, unless they're moving on to high-value or individual giving — the same community fundraiser stays with them throughout their community fundraising journey for continuity.
- **How far back did you look at the data to design the matrix?** — Five years, to capture the change in supporter behaviour since COVID-19.
- **What downloadable resources do you offer supporters at the lower tiers?** — Digital social media templates, certificates, and poster templates, with a future ambition to build a self-service portal for ordering physical items like collection boxes and T-shirts.

#### **Resources, tools, and frameworks shared:**

- **"Events in a box"** — Blue Cross's term for a packaged, ready-to-run fundraising activity (e.g. a coffee morning kit) that lowers the barrier to entry for supporters who don't know where to start.

#### **Peer-shared tips and CRM discussion (anonymised):**

A long, candid discussion broke out among attendees comparing CRM systems in real time. Systems mentioned by name included **Beacon**, **Raiser's Edge (NXT)**, **Donorfy**, **Salesforce**, and **Microsoft Dynamics 365** — with several attendees specifically recommending Beacon, and more mixed/cautious feedback shared on Salesforce. Worth noting this was informal, real-time peer opinion rather formal endorsement.

Other peer tips shared in the chat:

- Several attendees described using **open days** as an effective way to introduce their charity to the local community.

- One attendee shared success running a **tombola and "lucky dip"** of mini toiletries at a stall, citing increased footfall and funds raised.
  - Several attendees described joining their organisation's frontline/service delivery team meetings specifically to gather supporter and beneficiary stories for use in fundraising and community engagement.
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### **Session 3: Fundraising Analytics & KPIs — Keith Wilson**

This session was pre-recorded, so there was no live Q&A with the speaker, but it sparked a strong peer discussion in chat about measuring the impact of community activity beyond pure income.

#### **Peer-shared tips (anonymised):**

- One attendee shared they track how many fundraiser stories or blog posts are shared on social media as a way of measuring community engagement impact, separate from fundraising totals.
  - Another shared they use community events specifically as a volunteer recruitment opportunity, gauging interest in either fundraising or befriending roles depending on what resonates with the person.
  - A general theme emerged around understanding the "legacy and impact" of an event (i.e. its less tangible, longer-term outcomes) as something supporters themselves are often genuinely interested in hearing about, not just headline totals.
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### **Session 4: How to Set Boundaries and Spend Your Time Where You'll Get the Most Return — Punyapriya Singh**

#### **Questions asked and answered:**

- **Has there ever been a time a supporter relationship went wrong, and how did you recover it?** — Shared a real example of a long-standing supporter (who had raised tens of thousands of pounds) feeling overlooked when their fundraising wasn't mentioned in a newsletter. The resolution: an honest, non-defensive conversation acknowledging the mistake, without over-explaining or making excuses — and crucially, thanking the supporter for raising the issue directly rather than going public with their frustration. That supporter went on to raise close to £200,000 over the following decade.

- **Do you have any advice on assets or community fundraising products that have streamlined your workload?** — Examples included an online booking system for third-party fundraising sign-ups, a volunteering ambassador programme run through existing community groups, and ready-made lesson plans for schools (built to also satisfy curriculum requirements, making them easier for teachers to say yes to).
  - **How did you go about getting schools signed up once you'd identified your top targets?** — Started with existing relationships first, then tied requests to relevant national moments (e.g. Careers Week, charity awareness weeks) to make the ask timely and relevant.
  - **How do you approach building an engagement matrix similar to Blue Cross's, for your own organisation?** — Segmentation should go beyond donation amount alone — for schools as an example, segmenting further by type (primary, secondary, college) shapes tone and approach, not just contact frequency.
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## **Session 5: How to Plan Story-Driven and Inspiring Community Stewardship Journeys — Hannah**

This session covered the charity's high-profile partnership with Hasbro's Peppa Pig brand, including a storyline created for National Deaf Children's Society featuring "Daddy Pig" running the London Marathon.

### **Questions asked and answered:**

- **How did the partnership/storyline come about — how do you get consent to use a character like this?** — It began organically through a personal conversation between a colleague and one of the show's story writers around three years ago. The charity was involved early in shaping the storyline, and the partnership grew over time into a joint working group between the charity and Hasbro. The key message: it wasn't a "lucky break" alone — being ready to seize and build on an opportunity quickly mattered just as much as the initial spark.

**Key takeaway shared:** "People may remember what your charity does, but they'll never forget how your charity made them feel."

**A note on the day's programme:** the final scheduled session in Room 2 (on engaging global majority audiences in an authentic and equitable way) had to be postponed due to speaker availability. Fundraising Everywhere plans to revisit and refresh this topic for the member content library in future.