

Room 1 round-up: chat and Q&A

Everything discussed and answered, in one place

Hosted by Nikki Bell

Room 1 | Thursday 15 October 2026 | 11:00–15:00 BST

Anonymous summary for attendees. Attendee names and details have been removed.

About this round-up

This is an anonymous round-up of the Room 1 chat and Q&A. It covers a community snapshot from the polls, the key actionable learnings and stats shared, the questions that were answered (live by speakers, in the chat by speakers or hosts, or by fellow attendees), attendees' own takeaways, and the resources shared. Attendee names have been removed. Answers are paraphrased, so please check the recording for the full detail.

Community snapshot

At the start of the day, attendees shared how they were feeling. Larger words were given by more people.

How are you feeling about individual giving at the moment?

challenging **excited** **positive** **overwhelmed**
optimistic **opportunity** **stretched** **tough** **hopeful** **nervous**
daunted **worried** **uncertain** **stuck** **curious** **invested** **eager to learn** **tricky**
interested **exhausted** **lonely** **concerned**

70 people responded. Excitement and optimism sat alongside real pressure, with “challenging” and “overwhelmed” among the most common answers.

When you hear 'early attrition', what do you think is driving it?

cost of living **finances** **stewardship**

lack of engagement **lack of thanks** **communication** **change of mind**

trust **poor onboarding** **buyer's remorse** **competition** **the economy**

pressure at sign-up **wrong gift amount** **impact unclear** **too many asks** **life changes**

wrong audience

84 people responded during the opening session. Most pointed to cost of living and stewardship. The session went on to show that hidden process problems can matter just as much.

Key actionable learnings shared

Practical ideas from speakers and attendees that you can put into practice.

- **Look beneath your attrition rate.** Map every journey by channel, agency and product. Some supporters who seem to cancel never made a first payment because of a technical or process block on the charity's side.
- **Pair friction with connection.** Fix the data and process journey and the emotional journey together. If you can only do one, start with the data.
- **Bring technical colleagues in early.** Build campaign journeys with them rather than briefing them at the end, and create a blueprint you reuse for every new campaign. No tech team? Find the person in your organisation who loves data.
- **Treat soft opt-in as supporter experience.** Use it to send a better mix of emails (emotional, rational, even a "false forward"), not just another quarterly newsletter.
- **Document every soft opt-in decision.** Train staff, set up a cross-team working group, adapt your CRM to record consent type and date, review journeys and update your privacy policy.
- **Design moments, not flowcharts.** Start with the easy, high-impact fixes, such as replacing a payment provider's receipt with your own warm thank you.
- **Give each message one or two jobs.** Every touchpoint has functional, emotional or social jobs. Trying to do all of them at once overwhelms supporters.
- **One peak beats 20 average moments.** Plan a strong beginning, a peak and an ending. If you can't do it for everyone, do it for one group, such as regular givers.
- **Personal touches don't have to cost much.** Try a short Loom or Zoom video in an email, a postcard from a beneficiary, a certificate for years of giving, stickers or seeds.
- **Plan appeals as ecosystems.** Run one big creative idea across every channel for four to six weeks, with asks matched to each segment, rather than six separate appeals.
- **Treat lapsed donors like a cold audience.** If you accept a break-even return on cold, you can afford to work harder on lapsed supporters before spending on acquisition.
- **Design for how supporters feel.** Put the emotion you want to create in every creative brief. Dial up pride and inspiration, and dial down guilt and obligation.

- **Make the donation page work harder.** Use a clear call to action above the fold, progress markers, address lookup, a regular-gift upsell in the flow, a reminder pop-up and a personalised thank you.
- **Start matched giving small.** A pot of around £1,000 is enough. Switch it on mid-campaign without too much notice, so people don't wait to give.
- **Test with your own supporters.** Attendees shared that designed envelopes outperformed plain ones in their own tests, but only a well-designed outer works. Test before you decide.

Key stats shared

Figures quoted by speakers during Room 1. Please check the slides in the delegate bag for sources and full context.

~3,500	people were found stuck in GOSH's sign-up journeys over two years, never reaching a first payment. That represented hundreds of thousands of pounds in potential lost income. Megan Glover, Great Ormond Street Hospital Charity
£290m	a year in additional donations could be unlocked for UK charities by the soft opt-in (DMA estimate). Amy Buddle, Hynt
5 Feb 2026	is the cut-off date. Soft opt-in only applies to contact details collected on or after this date, so it isn't retroactive. Amy Buddle, Hynt
23,000	actions came from a Hospice UK hand-raiser campaign, with a £19 average gift and a 1.43 return on ad spend. Amy Buddle, Hynt
44%	of first-time supporters don't engage again, and over 30% drift away because they don't know how their gift was used. Craig Linton, Thread Fundraising (citing Manifesto's "Mind the Engagement Gap" report)
75%	more was given per email when Helping the Needy sent 40,000 donors a personalised "Wrapped" summary of their giving. Craig Linton, Thread Fundraising
6 million	fewer people give in the UK than a decade ago. The share of adults giving fell from 69% to 55%, and donations fell by £1.4bn in a single year. Tim Longfoot, Open
80%	of a typical supporter file hasn't given in two years or more, and only around 20% of cash supporters recruited are still active two years later. Tim Longfoot, Open
53%	of supporters score 9 or 10 for how likely they are to keep giving. Between charities, the figure ranges from 30% to 76%. Steven Dodds, Beautiful Insights (SAFE Index)
~40%	higher future engagement is seen among supporters who feel proud than among those who feel guilty. The most common emotion supporters feel is "useful" (48%). Steven Dodds, Beautiful Insights (SAFE Index)

Questions and answers

The First Six Months Problem: Fixing Early Attrition in Regular Giving

11:10 | Veronica Jaguite and Megan Glover (Great Ormond Street Hospital Charity)

Q: How often do you communicate with regular givers? I'm conscious of not over-communicating.

It depends on the product and channel someone came through. Lottery players, for example, have a period with no contact. It also depends on their opt-ins, as people with an email opt-in naturally hear from you more. The bigger risk is several teams contacting the same supporter, so GOSH is joining up its teams around what the supporter actually experiences.

Answered live by Veronica Jaguite and Megan Glover

Q: What advice would you give a small or fairly new charity developing a new donation sign-up pipeline?

You're in a good position, because you can set things up properly the first time. Work collaboratively with whoever handles your tech rather than just briefing them, create a blueprint to use for every campaign, and map your flows as you go so you can spot problems quickly. Veronica added that it helps to build your wider strategy, including legacies, into journeys from the start.

Answered live by Megan Glover and Veronica Jaguite

Q: If you only had the time and money to do one thing to improve attrition, what would it be?

Both chose data. Unpick your journeys and make sure the technical and operational side is as smooth as possible. Know your journey, map it from the start, and if supporters cancel without giving a reason, find a way to ask them so you build up insight over time.

Answered live by Veronica Jaguite and Megan Glover

Q: How did you approach the data mapping process, and what would you do differently?

Start with conversations. Talk to people who understand your journeys, and to agencies about their preferred processes, rather than accepting their default templates. Then map, review and improve. Expect to flex your ideal blueprint around what each agency's technology can do.

Answered live by Megan Glover and Veronica Jaguite

Q: Many attendees don't have a tech team. What advice do you have for them?

Megan isn't from a technical background; she came from face-to-face fundraising. Find the person in your organisation who is interested in data, play to that strength, and don't be afraid to ask "silly" questions. Several attendees from small teams also offered to connect and share what they had learned.

Answered live by Megan Glover, with additions from attendees

Soft Opt-In 2026 and Beyond: What IG Fundraisers Actually Need to Know

11:45 | Amy Buddle (Hynt)

Q: Do we need to track who soft opted in versus who gave explicit consent?

Yes. Make sure your CRM can record each type of consent, including the date it was collected. Document everything, and over-document if you need to.

Answered live by Amy Buddle

Q: Is there any kind of charity soft opt-in wouldn't be right for?

Not a whole type of organisation. There are shades of grey in the guidance, so consider it appeal by appeal and product by product rather than deciding for the whole charity at once.

Answered live by Amy Buddle

Q: If supporters donate through a third-party platform, or came to us through face-to-face or telephone fundraising, can we use soft opt-in?

Soft opt-in only applies to data your charity has collected itself. If someone donates to a fundraiser through a third-party platform, the charity hasn't obtained that data, so it can't rely on soft opt-in to contact them. Amy noted the same applies to face-to-face and telephone fundraising. Several attendees asked about specific platforms, so check the ICO guidance linked in Amy's slides and document your reasoning.

Covered in Amy Buddle's talk

Q: Can we use soft opt-in for supporters whose data we collected before 5 February 2026?

No. It isn't retroactive, so it only applies to contact details obtained on or after that date.

Covered in Amy Buddle's talk

Q: Does this apply to charities in Ireland?

No. The guidance covered in the session applies to the UK only.

Answered live by Amy Buddle and in the chat by Hynt

Q: Are CRM providers adapting their systems to support soft opt-in?

Attendees shared what they knew in the chat. One said Donorfy is working on it, and that goDonate already supports it. Another said Salesforce can be configured to show soft opt-in, with help from a consultant or someone in-house. In Room 2, an attendee shared that Beacon plans to launch soft opt-in support in January 2027.

Answered in the chat by fellow attendees

The Art of the Stewardship Touchpoint: Personal, Affordable, Scalable

12:30 | Craig Linton (Fundraising Detective and Thread Fundraising)

Q: How would you improve the "social" side for a charity with a small budget? We'd love to send welcome packs but don't have the money.

It doesn't have to cost much. Think of the Marie Curie daffodil or the poppy. A postcard from a beneficiary or a certificate for years of giving works too: something people can share that gives them a sense of pride and belonging. One of Craig's best low-cost tips is to record a short video with Loom or Zoom and add it to your emails. Attendees added their own ideas, including thank-you cards designed by service users and a card with a child's artwork on the front.

Answered in the chat by Craig Linton, with additions from attendees

Q: Does a welcome pack like GOSH's go out for every donation, whatever the size?

Craig believes so; his gift was £10 or £20. If your budget doesn't stretch, find the point where it is affordable, such as £50, £100 or £200, or start with regular givers because their lifetime value is so high. Attendees added that some only send packs to regular givers, as a pack for a small one-off gift can feel like money spent on fulfilment rather than services. Another phones first-time cash donors to thank them and ask why they gave.

Answered in the chat by Craig Linton, with additions from attendees

Q: We have a physical welcome pack but struggle to automate the data side for new donors. Any advice?

APIs and tools like Zapier and Make.com can be a godsend, depending on your CRM. You can now do a lot quickly and cheaply without much technical experience. A good data flow should also distinguish first-time supporters from repeat donors.

Answered in the chat by Craig Linton

Q: Is there research showing print and post are still valuable for engaging supporters?

Craig recommended the work of Jon Lepp and Mark Phillips, who make a strong case for keeping postal communications in the mix.

Answered in the chat by Craig Linton

Q: Do designed envelopes work better than plain ones?

A good designed outer will outperform plain, but an uninspiring one won't. Live stamps and a handwritten font can be good alternatives, and don't forget the back of the envelope. One attendee shared that their own tests found supporters responded better to a designed envelope, so test with your own audience.

Answered in the chat by Craig Linton, with an addition from an attendee

Raise More From The Core: How To Develop A Successful Appeal Ecosystem

13:05 | Tim Longfoot (Open), with Liz Campbell-Black (Open) in the chat

Q: How do you keep flexibility through the year when the planning is done up front?

The up-front planning is the foundations: your data, your organisation's strategy and the tests you want to run. The campaigns themselves are developed close to launch. So the plan sets which donors you'll talk to and what you'll ask, not which project you'll feature. Liz added that you can set the channel plan first and add the creative idea nearer the time.

Answered live by Tim Longfoot and in the chat by Liz Campbell-Black

Q: How do you handle the cultural shift from independent channel teams to one integrated appeal?

The difficulty is usually structure rather than willingness. It works when all teams answer one brief in one room, recognising that they share donors and channels. It struggles when teams have different objectives and KPIs, so it needs a clear organisational brief from the top. Liz added that aligning budgets and targets first can actually save money. Other teams, such as content, digital and brand, should be in the room too.

Answered live by Tim Longfoot and in the chat by Liz Campbell-Black

Q: What if our organisation doesn't know what it will be doing across the year?

Approach it campaign by campaign. The multichannel plan can be developed with or without the big idea agreed.

Answered in the chat by Liz Campbell-Black

Q: How is this different from an integrated campaign or normal appeals planning?

It takes inspiration from integrated planning, but it is more detailed and focused on increasing returns from your core supporters. Liz described it as an evolution that is helping teams align and focus.

Answered in the chat by Liz Campbell-Black

Q: Would you use A/B testing here? And how do we test with a very small mailing file?

Yes. Ideally set tests at the start of the year and test your hypotheses across channels, building learning as you go. With a small file, focus where volume is highest, perhaps your lapsed supporters, and use high-impact tactical tests to reactivate them.

Answered in the chat by Liz Campbell-Black

Q: We're a very small team. What would you prioritise?

Start with the data. Work out where the potential value is in your file and begin there.

Answered in the chat by Liz Campbell-Black

Q: Can you give examples of WhatsApp in the channel mix?

Open has run a WhatsApp quiz linked to a popular TV show, and uses WhatsApp to continue conversations started in other channels, such as mail, with richer content and a two-way conversation.

Answered live by Tim Longfoot

Q: How do you define segments such as onboarding, lapsed and deeply lapsed? Where does propensity modelling fit?

The segments are based on recency and value of giving. Propensity modelling can be included, but Open has found its growth segmentation a good way to set objectives and track movement across the file.

Answered in the chat by Liz Campbell-Black

Q: Could an ecosystem include raffle and lottery products?

Open hasn't integrated them yet, but you could, especially to test follow-up journeys and cross-selling.

Answered in the chat by Liz Campbell-Black

Q: What are low-cost welcome-pack ideas for smaller charities?

Self-badging items work best: things that align a donor's values with yours, like window or laptop stickers, or useful items like seeds. One attendee shared that their charity sends a small set of stickers and a poster, which are cheap and easy to share.

Answered in the chat by Liz Campbell-Black, with an addition from an attendee

Catching Feels: What Emotion Really Does for Donor Retention

13:50 | Paul Seabrook and Steven Dodds (Beautiful Insights)

Q: Can you tell us more about segmenting supporters by motivation?

Beautiful Insights looks at motivations such as personal connection to a cause, emotional drivers, shared values and wanting to make a tangible impact. They aren't exclusive, but knowing which are strongest shows meaningful differences between supporters. What triggered the first donation also helps build the segments.

Answered in the chat by Paul Seabrook

Q: What sample sizes is the data based on?

It varies by charity, but they aim for 95% confidence with a margin of error of plus or minus 4%. In practice that usually means at least 500 responses, and they flag it to clients if volumes are low.

Answered in the chat by Paul Seabrook

Q: Are there differences between men, women and non-binary people?

Nothing has stood out in the analysis so far, though Steven would like to look more closely. Paul added that there are interesting differences in gift value and frequency, but these depend heavily on motivation and how people first came to the cause. The film featured two men because their quotes were particularly quotable.

Answered live by Steven Dodds and Paul Seabrook

Q: Does "grateful" mean grateful for the charity's communication, or for the supporter's own situation?

The survey asks which emotions supporting the charity makes you feel, so it isn't specified. Steven reads it as grateful for your own situation, but agreed it could be read either way and may be worth refining.

Answered live by Steven Dodds

Q: Where does anger fit in, for example anger at injustice?

Anger isn't an option in the survey. The list came from coding the most common free-text answers, and anger didn't appear often. Paul added that anger and guilt are often used to get noticed, but the survey measures how supporting the charity makes you feel once you've engaged.

Answered live by Steven Dodds and Paul Seabrook

Q: If you find an emotional gap among supporters, what would you do to close it?

Focus on the affinity builders, pride, gratitude and inspiration, as early as you can. Put them in your creative briefs and don't let go.

Answered live by Steven Dodds and Paul Seabrook

Maximise Every Moment: Making Every Gift Go Further

14:25 | Victoria Read and Fernanda Salerno (Funraisin)

Q: Is this session all about a third-party platform?

Funraisin is a platform, but the examples come from many charities. The host added that speakers are briefed not to pitch, and an attendee pointed out that most platforms offer similar tools, so you don't need a particular provider to use these ideas.

Answered live by the host, with an addition from an attendee

Q: How do I get started with matched giving?

It doesn't need a huge pot; around £1,000 from a corporate partner or major donor is enough. Time it for the middle of your campaign and don't announce it far in advance, or people will hold off. Then celebrate it prominently on the page.

Answered live by Victoria Read

Q: We're growing a group of community ambassadors who fundraise £200 a year. How do we make it feel mutually beneficial?

Celebrate them visibly. Some charities use lifetime leaderboards, with rankings linked to the cause. Military charities, for example, give fundraisers military ranks. Small, fun ways of saying "we see you" can keep people going.

Answered live by Victoria Read

Q: How can charities working with difficult subjects celebrate supporters sensitively?

Focus on the charity's story and the people it supports, as GOSH does. Personalisation goes a long way. It doesn't need confetti, just "Thank you, [name]".

Answered live by Victoria Read and Fernanda Salerno

Q: What can we do ourselves if these platform features are beyond our budget?

Partner up internally to share the load, for example by running an appeal alongside a peer-to-peer event. Those audiences overlap more than we think. And always tell people afterwards how much was raised and what it could fund.

Answered live by Victoria Read

Q: Does Funraisin integrate with Beacon, and does it claim Gift Aid?

There's no direct Beacon integration, but Funraisin has an open API that can sync with most systems. It doesn't claim Gift Aid on charities' behalf, but provides reports, and updates are coming.

Answered live by Victoria Read

In attendees' own words

Anonymous takeaways shared in the chat, session polls and post-event feedback.

"It might not be the supporter wanting to cancel, it could be something happening our side that is stopping the gift."

On The First Six Months Problem

"Get organised! Read the ICO website. Document everything."

On Soft Opt-In 2026 and Beyond

"Great to hear that something is better than nothing. As a one-woman fundraising and comms department, there is never the time and resources for everything I want to do."

On The Art of the Stewardship Touchpoint

"Eco-system rather than one-shot."

On Raise More From The Core

"How to instil pride into donors, why it matters."

On Catching Feels

"Personalisation is good – that applies to so much in fundraising."

On Maximise Every Moment

Resources shared

- Slides for every session are in the delegate bag, along with extra resources from our partners.
- If your download of Craig Linton's slides didn't match his session, Craig shared the correct version in the chat.
- ICO guidance on the charity soft opt-in: the link is on Amy Buddle's slides. Hynt's free resources are on its website.
- Wow ideas generator: a free AI tool from Thread Fundraising and Rob Woods for creating peak moments. The link is on Craig's slides.
- Automation tools Zapier and Make.com were recommended for connecting your CRM to welcome packs and journeys, and Loom or Zoom for quick personal videos.
- Open's Charity Benchmarks are open for charities to take part.
- SAFE Index questions and benchmarks: scan the QR code on Beautiful Insights' final slide.
- Funraisin's free guides to increasing average gift and to individual giving, plus details of its Uplift Convention in November.
- The Art of Fundraising Conference in November covers the soft skills behind supporter relationships, including difficult conversations and getting buy-in.
- Subtitles: click CC in the bottom right corner of the video (refresh if you can't see it).

Missed a session? Use your original joining link to watch everything from both rooms on demand until 15 November. Fundraising Everywhere members also have every session in their on-demand library.