

Room 2 round-up: chat and Q&A

Everything discussed and answered, in one place

Hosted by Cam St-Omer

Room 2 | 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 2 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, by fellow attendees, or by speakers after the event), attendees' own takeaways, and the resources shared. Attendee names have been removed. Answers given during the event are paraphrased, so please check the recording for the full detail. Answers sent by speakers after the event are in their own words.

Community snapshot

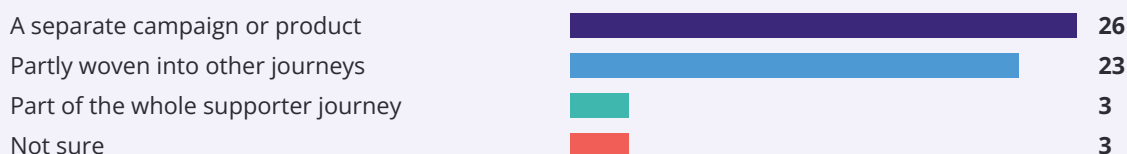
Polls during the sessions gave a picture of where attendees are with face-to-face and legacy fundraising.

Where are you with face-to-face fundraising?



45 people responded during the face-to-face session.

Where does legacy sit in your organisation today?



55 people responded. Only 3 said legacy is already part of the whole supporter journey. When asked how confident they felt talking about gifts in wills, 6 of 11 chose 1 or 2 out of 5 at the start of the session. At the end, none did.

Key actionable learnings shared

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

- **Reach people who already care.** Petition-led and partner channels can bring in supporters who have already acted on your cause.
- **Don't rely on one channel.** Keep using Meta, but add at least one more channel, and measure engagement at 6 to 12 months, not just cost per lead.
- **Email more, and don't fear the unsubscribe.** One or two emails a week isn't too many. A cold list isn't healthy, but an unsubscribe is. Turn one seven-item newsletter into seven emails.
- **Close the loop.** Every action needs a follow-up showing what it achieved. Quizzes and surveys can do this for non-campaigning charities.
- **Invest beyond attention.** Map your touchpoints against attention, activation, engagement and long-term commitment. Most charities have a gap in the engagement stage.
- **Try an engagement action.** Localise your impact by postcode, let supporters send a message of hope, or turn a story into a richer format like a comic. Keep it as easy as signing a petition, with no account sign-up.
- **Make the business case with your own numbers.** Look at where supporters drop off in your own journey, and build the case around fixing that.
- **In face-to-face, efficiency is the metric that matters.** Fundraising days multiplied by donors per fundraiser per day gives your gross donors. Ask your agency for both every week, and look ahead, not back.
- **Use the five whys.** Before adding fundraisers or agencies, keep asking why until you reach the root cause.
- **Protect the first few months.** Welcome calls, whole-pound gift amounts and a quick first debit all reduce early cancellations.
- **Treat legacy as a continuation, not a product.** Audit one journey for natural legacy moments, rebuild personas around values, and brief one non-specialist team.
- **Help every team feel comfortable talking about legacies.** Supporter-facing staff and volunteers need to signpost, not sell. FAQ sheets and role-play build confidence.
- **Use time as free data.** Supporters see themselves differently over the years. Update your asks as they move on, rather than repeating the one that suited them a decade ago.
- **Only collect insight you will use.** Asking whether a gift is in memory should change the journey. Drop questions that don't, and use free sources such as YouGov for demographic insight.
- **Own your peer-to-peer data.** Fundraising pages hosted on your own branded platform let you bring sponsors into your CRM and journeys.
- **Refresh before you reinvent.** Work out what made a past product succeed, keep that, and refresh the creative, timing and targeting around it.
- **Judge the whole funnel.** Fewer, better leads can beat volume. Front-load media spend if early leads convert best, and keep media and telemarketing agencies working to the same forecasts.

Key stats shared

Figures quoted by speakers during Room 2. Please check the slides in the delegate bag for sources and full context.

£2.86	was the average cost per lead on Meta for one animal charity, and costs are trending upwards. Rhiannan Sullivan, Care2
30% / 70%	of people signing actions on Care2 are keeping the soft opt-in box ticked, while 70% untick it. These are early figures. Rhiannan Sullivan, Care2
33%	more donors come from raising face-to-face efficiency from three to four donors per fundraiser per day. Kelvin Hopkins, The Professional Fundraiser
Half	as many donors are lost to attrition when they receive a welcome call. Kelvin Hopkins, The Professional Fundraiser
~2x	the attrition was seen for donors signed up at £8.68 a month compared with £8, a difference of just 67p. Kelvin Hopkins, The Professional Fundraiser
28.5%	of donors cancel in the first 12 months when the first debit comes within 20 days. When it takes 63 to 90 days, about half are lost. Kelvin Hopkins, The Professional Fundraiser
400 years	of giving £5 a month would equal an average UK legacy gift. Sinem noted the figure is a few years old. Sinem Bilen Onabanjo, Oxfam
150	Oxfam shops carried Stay in the Fight legacy messaging this year, for the first time. Sinem Bilen Onabanjo, Oxfam
£450	is the average raised by an active tribute fund page. Eoghan Beecher, iRaiser
154	direct debits came from Christian Aid's New Year prayer journal campaign, against a target of 120. There were fewer leads than planned (5,552 against 8,000), but conversion was 6.1% against a 4% target. Sophie Lamont, Christian Aid
7.3%	conversion was achieved in a spring burst (target 5%), with 85 direct debits against a target of 70. Media spend for the campaign was around £50,000. Sophie Lamont, Christian Aid

Questions and answers

Small List, Big Impact: Getting Supporter Acquisition Right

11:10 | Rhiannan Sullivan (Care2)

Q: I thought you couldn't use soft opt-in if supporters come in through a third-party provider like Care2. We use CAF Donate and can't opt donors in.

It has been a live debate, and each charity needs to be comfortable with its own decision. The Fundraising Regulator's guidance goes a step further than the ICO's, and they interpret "third party" differently. After extensive legal advice, Care2 acts purely as a processor, like a web form. The charity is the data controller throughout, with its own privacy policy and wording. The guidance is aimed more at platforms where a charity might not know that someone has opted in to its list.

Answered live by Rhiannan Sullivan

Q: How is soft opt-in different from consent? Isn't it just positive versus negative phrasing?

Care2 uses a pre-ticked box that people untick to opt out, across every market. Other organisations use different mechanics. The key is giving people a very clear opportunity to opt out, and the language still lets them understand what they're choosing. Early data shows 70% are still unticking the box, which shows supporters are making an active choice.

Answered live by Rhiannan Sullivan

Q: What did the international organisation do to scale more efficiently?

They kept using Meta but added a petition-led channel, and changed how they measured success, looking at engagement and every touchpoint over six months rather than first cost per lead. The full case studies are in the delegate bag.

Answered live by Rhiannan Sullivan

Q: If you could leave us with two priorities, whatever our size or budget, what would they be?

Give your ongoing email programme the same care as your welcome journey. You probably already have the content: one newsletter with seven items could be seven emails. And don't fear sending too much. One or two emails a week is not too many, and US charities send far more, as the M+R benchmarks show.

Answered live by Rhiannan Sullivan

Closing The Engagement Gap: The Missing Piece To Turn Leads Into Donors

11:45 | Florian Engel (More Onion)

Q: How do you close the gap between audience needs and organisational needs?

Map your journey out visually. You'll usually see that most communications ask supporters to do something for you. Break that up with things that build loyalty, show impact or give something back, such as an engagement action. Long-term objectives depend on audience-centred communications. The host added that getting internal buy-in is part of this, and the Art of Fundraising Conference in November has a session on it.

Answered live by Florian Engel and the host

Q: We have an online board for messages of hope, but it hasn't had any traction. How can we get more engagement?

Check how people find it and how easy it is to use. Some boards make people create an account first, which puts them off. Make it as easy as signing a petition, and explain clearly by email how the messages will make a difference. The host added: check your supporter insight to make sure it meets a real need, not just an internal idea.

Answered live by Florian Engel and the host

Q: What results have you seen from engagement actions that we can use to propose this work internally?

It's often a long tail, so don't expect quick wins. More Onion has split-test results from various organisations, but Florian is wary of applying one organisation's numbers to another. Start with your own data, see where supporters drop off, and build your case around that. The host suggested combining your own numbers with external case studies, such as the one in the delegate bag.

Answered live by Florian Engel and the host

Q: Where can I find the engagement action idea generator?

It's linked from More Onion's free report on engagement actions, which is on the final slide and in the delegate bag.

Answered in the chat by a fellow attendee and the event team

Unlocking F2F Performance: Partnerships, KPIs & Scalable Growth

12:30 | Kelvin Hopkins (The Professional Fundraiser)

Q: How can face-to-face fundraising be integrated with other channels to increase overall awareness?

Keep your agency involved beyond acquisition, in what happens at six months, nine months and a year, so they are invested in long-term attrition. Think omnichannel, including how digital can support fundraisers and give them the materials to increase their efficiency.

Answered live by Kelvin Hopkins

Q: This is great advice in thinking about working with a F2F agency. However, we're working with 2 agencies who are just struggling to recruit. What can we do?

It depends on the context of 'recruit' and whether you mean struggling to recruit fundraisers onto the campaign, or struggling to recruit donors. Either way, it comes back to my main KPI of fundraiser efficiency, as the issue in both instances is that the number of donors per fundraiser per day is less than anyone would want it to be. My advice, and depending on how open your agency partners are, is to bring both together and to go through the Five Whys. You will hopefully end with alignment around what the underlying issue and challenge is. The chances are, given both agencies are struggling, is it's something in your control and not theirs, so your brand's strength and how well it's resonating with members of the public, or the product. This isn't an easy fix, but for as long as it remains unaddressed, your agencies will continue to struggle, fundraiser and agency fatigue will settle in, and you'll never achieve the results you're looking for.

Answered after the event by Kelvin Hopkins

Q: Can you tell us more about why opt-in rates increase when efficiency is better?

Typically what higher efficiency means is better engagement from the public. When fundraisers are recruiting a low number of donors per day, they're probably casting the net quite wide to attract these few; and as such, these donors are more likely to be sympathetic to the cause, let's say, rather than true advocates! When the efficiency is high, your cause is then really resonating, and rather than the net being cast wide, it's perfectly tailored and your core demographic is signing up. They're more engaged, more invested and therefore more likely to opt in, and to stay with the charity for longer.

Answered after the event by Kelvin Hopkins

Q: Is there any advice you can give to charities managing a drop in volume, when fundraisers move to a different agency (that we have no control over)?

Fundraiser behaviour is key here; you need to ask why they are moving to another agency. Typically it's for two reasons. The first is the agency's culture, maybe that fundraiser isn't aligning with the agency – that doesn't mean the agency is bad or doing things wrong, it just means that personalities don't align. In such instances there is nothing the agency or you can do. The other reason fundraisers move between agencies is because the next agency has a perceived better offering, i.e. a 'better' campaign. Maybe the agency you're working with is trying to keep fundraisers on a campaign they don't want to be on, so to move campaigns, they move agencies!

The trick for you is to make your campaign the most compelling within that agency's client portfolio. My advice therefore is to look at what other charities your agency works with, understand those charities' brands, how they may resonate with the public by comparison, and whether your campaign stacks up in terms of products and donation values – is yours attractive to fundraisers within that agency? If it is, those fundraisers are more likely to stay with that agency and stay on your campaign, as they can't get it anywhere else!

Answered after the event by Kelvin Hopkins

Q: I'm interested to know how you encourage fundraisers to buy into that high quality, long lasting approach.

I'm going to come back to People & Process. The process is putting into place the necessary tools and boundaries. I will start with technology. On most apps within the sector, you can restrict products, set donation values etc. So as an example, we don't allow for double line lotteries to be recruited because of the higher attrition, so this simply isn't an option on the tablet. Likewise, the cancellations for donations at £8.68 per month being twice that of an £8 donation, so £8.68 is not an option that appears, all that can be entered is full pounds. So, number one is to look at the technology, what are you allowing fundraisers to do, and what are you restricting them from doing.

Number two, also process orientated, but behavioural as well, is having a pulse and a rhythm to things. So, let's take donors over the age of 45 as an example. In our weekly leadership meetings we have 15 KPIs that we look at, age being one of them, and we target x% of donors being over 45. You can bring this into your status calls with the agency. Have leading KPIs like this – examples of leading KPIs are fundraising days booked next week, % of donors over 45 – get these leading KPIs right, and the trailing KPIs of gross donor recruitment and attrition as in this example will follow. But by looking at this every single week it creates that rhythm and a pulse that is so important to providing traction; and your agency team will begin to focus on this more and more as no one wants a red versus a green KPI! Also never look at KPIs in weekly isolation, have them all up on the meeting screen for the quarter, and if one is continuously red, use the 5 Whys to get to the root cause, and then it's IDS – Issue, Discuss, Solve.

Another process regarding quality, is having a precision strategy so fundraisers are being put in front of the right donors. Be this street, door, PS, the agency has to have a strategy. Ask them what it is. How are they profiling the locations they are going to, to set their fundraisers up for success, and recruit quality supporters.

The last part of this is culture. Are your agencies focused on quality, or are they focused on volume! The agency's values, that of their owner/MD, it all trickles down and forms the culture. Individual fundraisers don't need telling, or training, or explaining. They need to be immersed in a culture of quality because 'that's simply how it's done here!'

Answered after the event by Kelvin Hopkins

Embedding Legacy Conversations Across the IG Supporter Journey

13:05 | Sinem Bilen Onabanjo (Oxfam)

Q: What are your top tips for training supporter care teams or shop staff to talk about legacies?

Help them feel comfortable talking about it. Many people find death and money hard to discuss, but older volunteers are often very relaxed about it. Make clear that their job is signposting, not writing wills, and give them tools like FAQ sheets. The host added that role-play, however cringey, builds real confidence for live conversations.

Answered live by Sinem Bilen Onabanjo and the host

Digital Fundraising: Turning Your Community Into Community Fundraisers

13:50 | Eoghan Beecher (iRaiser)

Q: Is there any data or evidence that supports the community mapping?

The version shown was simplified, but Charities Aid Foundation research on donor motivation consistently shows people moving from one form of support to higher-value forms over time. The best evidence is in your own CRM. Map the journeys of supporters with several touchpoints or giving types, and you will usually see them move up in value.

Answered live by Eoghan Beecher

How To Revive A Flagging Val-ex Product

14:25 | Sophie Lamont (Christian Aid), pre-recorded, with Sophie in the chat

Q: When a lead generation form sits on Meta, how do you get the data, and can you apply soft opt-in?

The data is retrieved from Meta Business Suite and shared by the digital team. As far as Sophie is aware, soft opt-in can't be applied to standard consumer lead generation forms on Meta. Christian Aid also wanted supporters to know they would be contacted in order to receive the product, so a clear opt-in was important. The forms used were Meta's native instant forms (lead ads).

Answered in the chat by Sophie Lamont

Q: What was the ROI and attrition like, and what did it cost?

Christian Aid is still tracking ROI and attrition, as it's less than a year since the January 2026 burst. For products that didn't work so well, people tended to cancel around the three-month mark. Media spend was around £50,000.

Answered in the chat by Sophie Lamont

Q: How could this approach work for a smaller organisation with a limited budget?

Don't rush the product research and design, as that is key to reaching people with an affinity for your cause. Christian Aid is also working on how to steward people who take the product but don't start a regular gift. One attendee shared that a charity they worked for ran this in-house, making the calls themselves and sending the product with a handwritten note.

Answered in the chat by Sophie Lamont, with an addition from an attendee

In attendees' own words

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

"Unsubscribes are healthy – a cold list isn't."

On Small List, Big Impact

"I used the engagement action idea generator literally only 3 times and found an idea that I think I could potentially get buy in for, it's awesome!"

On Closing The Engagement Gap

"Really clear direction and advice for F2F. Demystified something that can be confusing and intimidating!"

On Unlocking F2F Performance

"Legacy conversations need to be woven into IG journey, not a separate thing."

On Embedding Legacy Conversations

"Think about the supporter in relation to time and the evolution of their persona."

On Digital Fundraising

"I think we all feel the pressure to reinvent the wheel but going back to what we know can often be enough!"

On How To Revive A Flagging Val-ex Product

Resources shared

- Slides for every session are in the delegate bag, including Care2's three full case studies and More Onion's case study.
- More Onion's free report on engagement actions, with a link to its idea generator: more-onion.com/free-reports. Florian's book on the engagement gap launches with the Sheila McKechnie Foundation in November.
- M+R Benchmarks were recommended for comparing UK and US email volumes.
- Beacon CRM users: an attendee shared Beacon's update that it plans to launch soft opt-in support in January 2027.
- Charities Aid Foundation research on donor motivation, and YouGov profiles for free demographic insight instead of asking on donation forms.
- Kelvin Hopkins' full slides, including the attrition data, are in the delegate bag, with his email address on the final slide.
- Sinem Bilen Onabanjo is happy to continue the conversation on LinkedIn.
- The Art of Fundraising Conference in November includes a session on getting buy-in and influencing internally.
- 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.