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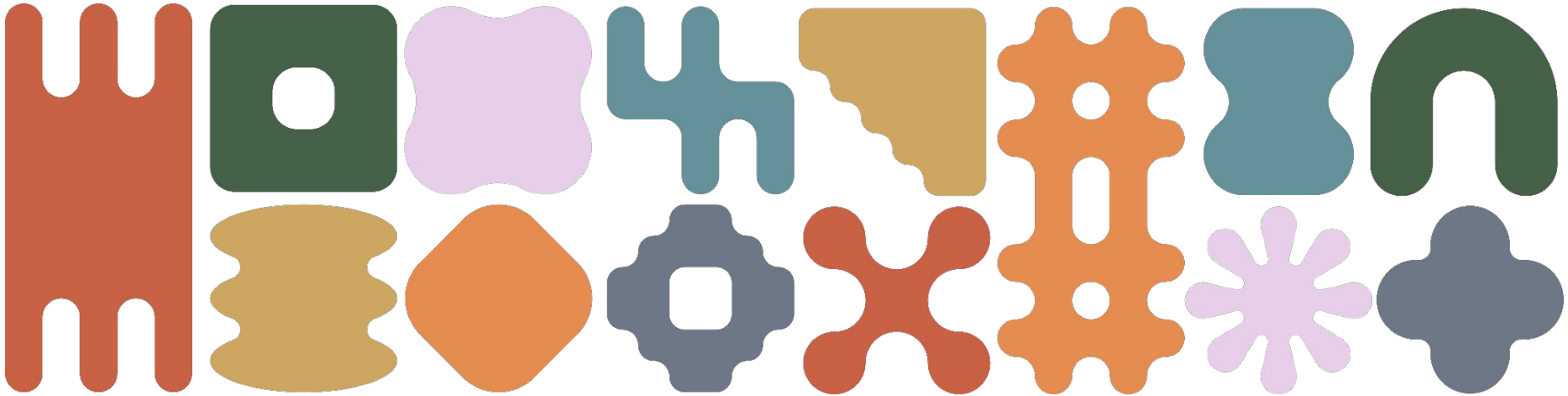
Soft Opt-In 2026 and Beyond: What IG Fundraisers Actually Need to Know

Fundraising Everywhere Individual Giving Conference 2026



A bit about me:

Amy Buddle (she/her)

Digital Strategist at Hynt

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A bit about me:

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A bit about me:

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A bit about me:

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A bit about me:

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Soft Opt-in is a GDPR-level change.

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Did GDPR feel like it took your contactable supporter base from this...

To this?

Soft opt-in could unlock an estimated £290 million in additional donations each year in the UK.

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However...

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Soft Opt-in is not just a question of data management.

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Soft Opt-in is a question of *supporter experience*.

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Complete this sentence:
“We’re implementing soft opt-in because…”

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“We’re implementing soft opt-in because we LOVE our database, and we adore consent management”

Said nobody, ever.

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“We’re implementing soft opt-in because we LOVE our ~~database~~ donors”

Said me, and you.

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Contents

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2. Who, How and When?
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4. Getting Started!

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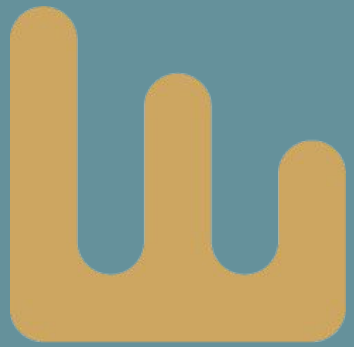
What is Soft Opt-in?



One

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Before soft opt-in

Under UK GDPR and PECR rules, consent is typically the only legal basis for direct electronic mail marketing.

*There are some exceptions

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Before soft opt-in

(in layman's terms...)

You can **only** email or text someone if they have explicitly checked a box and said,

"YES, YOU CAN CONTACT ME"

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After soft opt-in

As of 5 February 2026, registered charities may use **legitimate interest** as a lawful basis for direct electronic fundraising marketing as an exception to standard consent requirements.

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After soft opt-in

(in layman's terms...)

Since 5 February 2026, if somebody has shown any interest in your charity, you can assume that they are interested in hearing from you about your work.

You don't need to ask them first.

(But, you should give them a chance to say no...)

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After soft opt-in

As of 5 February 2026, registered charities may use **legitimate interest** as a lawful basis for direct electronic fundraising marketing as an exception to standard consent requirements.

But there are rules...

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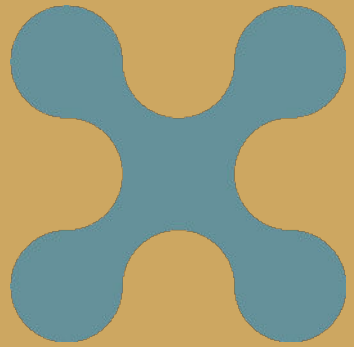
Who, How and When?



Two

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Charities can apply soft opt-in for supporters whose data was collected after a compliant charitable soft opt-in process has been completed.

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But what does this mean in practice?

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Who, How and When?

You have to be a **charity**

You have to have obtained the supporter's information

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You have to have obtained the supporter's information

Example

✔ **Good practice**

A supporter donates through a charity's website. The online form asks for their email address and has a prominent opt-out box the supporter can tick if they don't want to receive marketing about the charity's charitable purposes.

✘ **Bad practice**

A supporter donates through a third-party online fundraising platform. The platform collects their email address and passes it on to the charity. The charity did not collect the contact details directly.

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The charitable purposes soft opt-in commenced on 5 February 2026.

You must only use it if you obtained the recipient's contact details on or after this date.

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That is to say-

It is not retroactive!

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Who, How and When?

You have to be a **charity**

You have to have obtained the supporter's information

You did this through the person expressing an interest in, or offering or providing support for, **your charitable purposes**.

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Through the person expressing an interest in, or offering or providing support for, your charitable purposes

Example

✔ **Good practice**

A person browses a wildlife charity's website. The website has an online form for people to complete if they'd like to receive updates about the charity's work to support endangered species. The person is interested in this and submits their contact details through the form.

✘ **Bad practice**

A person visits a community café run by a local charity. While there, they use the free guest wifi and enter their email address when prompted. They don't ask for information about the charity's work or do anything else that suggests they're interested in the charitable purposes.

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Who, How and When?

You have to be a **charity**

You have to have obtained the supporter's information

You did this through the person expressing an interest in, or offering or providing support for, **your charitable purposes**.

The sole purpose of your direct marketing is to **further your charitable purposes**.

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The sole purpose of your direct marketing is to further your charitable purposes

Example

✔ **Good practice**
A pet rehoming charity collects email addresses from people who apply to adopt cats and dogs. They provide a clear way for people to opt out of marketing about their charitable purposes. The charity later emails these people asking for donations to help cover veterinary care costs and sharing updates on recent rehoming successes.

✘ **Bad practice**
The same charity later emails these people promoting discounted pet care products sold by a commercial pet supply company that sponsors the charity. They also promote the work of a separate animal welfare charity they are collaborating with, encouraging people to donate directly to the partner charity's veterinary care appeal.

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Who, How and When?

You have to be a **charity**

You have to have obtained the supporter's information

You did this through the person expressing an interest in, or offering or providing support for, **your charitable purposes**.

The sole purpose of your direct marketing is to **further your charitable purposes**.

You provided the **recipient an opportunity to refuse or opt out** when you collected their contact details.

You give the recipient an opportunity to refuse or opt out in **every subsequent communication**.

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So-
You have to be a charity.
You have to collect the data through your own operations.
You have to give them a way to say no, today and in future.

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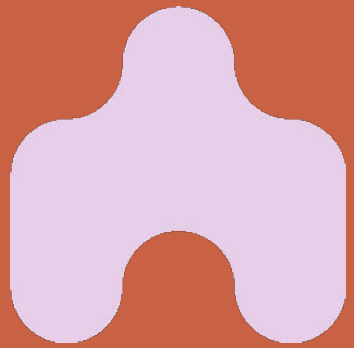
What can I do with it?



Three

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The new Soft Opt-in rules will help you lean in to Lead Gen.

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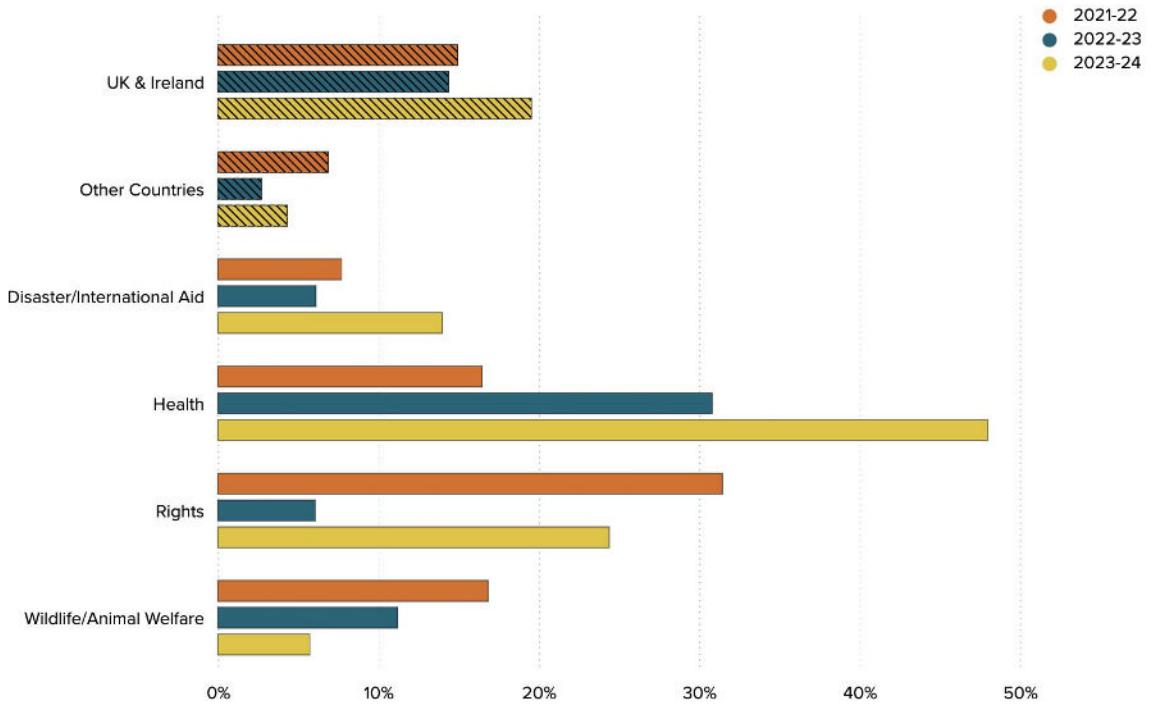
List growth is a focus for most of the sector, and it's growing year-on-year



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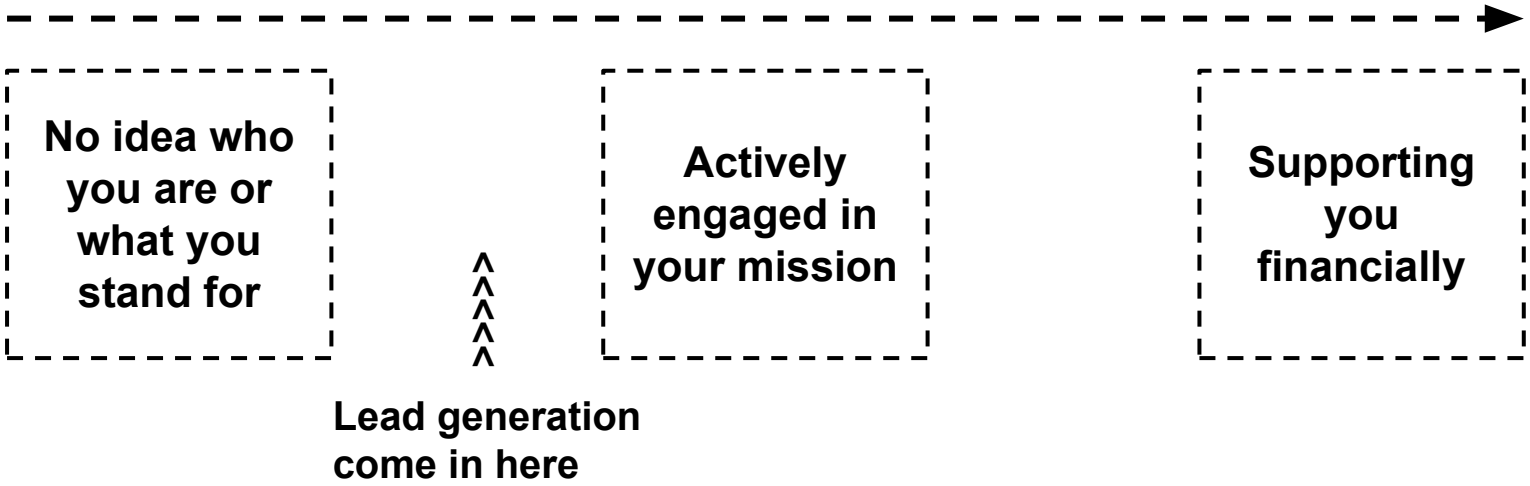
Consideration: Lead Generation is like a great first date with your new supporter



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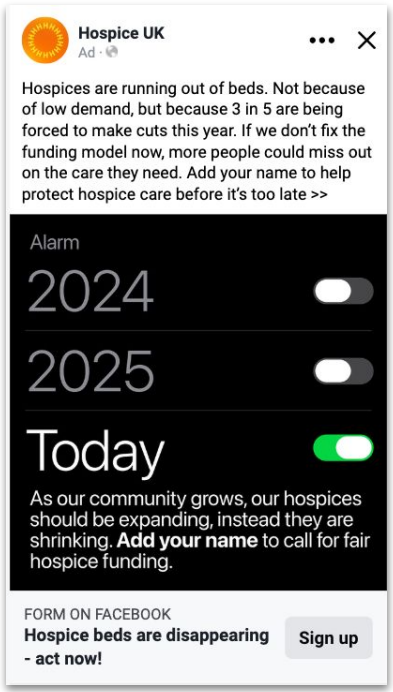
Hospice UK wants to change the system



Over 23,000 actions

£0.32 CPL

£18 CPA

£19 Avg Gift

1.43 ROAS

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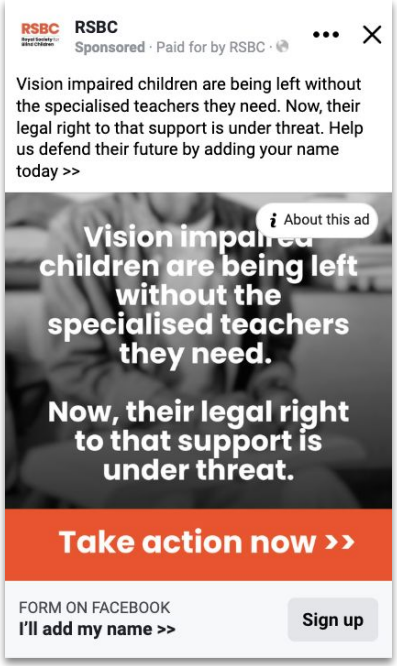
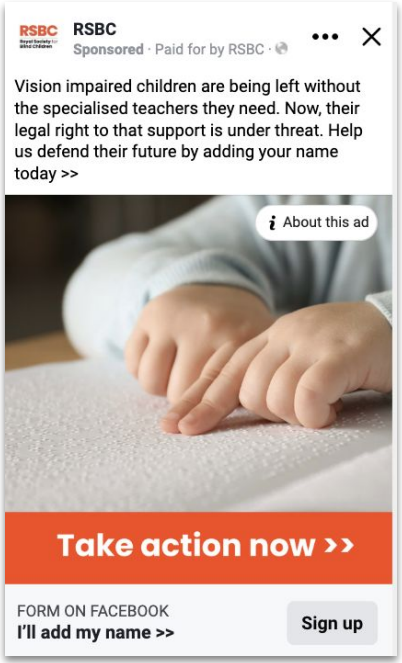
RSBC is creating a better world for children





- Over 10,000 actions
- £1 CPL
- £80 CPA
- £14 Avg Gift
- 0.19 ROAS

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Animal Free Research UK are protecting animals

Over 14,000 actions

£0.83 CPL

£46 CPA

£14 Avg Gift

0.30 ROAS

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The true power of Soft Opt-in is email marketing...

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Bringing it all together with Email

- You own this channel!
- It’s your own direct channel to supporters
- It provides the highest Return on Investment (ROI) because it targets warm leads and existing audiences
- We’re able to nurture relationships, provide exclusive content, and drive repeat actions

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Here are some examples of some great emails:

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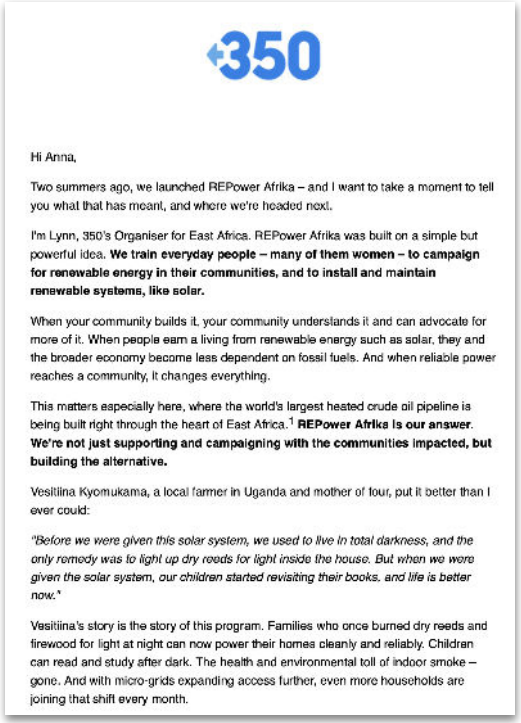
A Cause-led Emotional email

- A case-study led email with a strong emotional hook, three strong price points laddering up, and a tangible reason to give



+350

Hi Anna,

Two summers ago, we launched REPower Afrika – and I want to take a moment to tell you what that has meant, and where we're headed next.

I'm Lynn, 350's Organiser for East Africa. REPower Afrika was built on a simple but powerful idea. **We train everyday people – many of them women – to campaign for renewable energy in their communities, and to install and maintain renewable systems, like solar.**

When your community builds it, your community understands it and can advocate for more of it. When people earn a living from renewable energy such as solar, they and the broader economy become less dependent on fossil fuels. And when reliable power reaches a community, it changes everything.

This matters especially here, where the world's largest heated crude oil pipeline is being built right through the heart of East Africa.[1] **REPower Afrika is our answer. We're not just supporting and campaigning with the communities impacted, but building the alternative.**

Vesitiina Kyomukama, a local farmer in Uganda and mother of four, put it better than I ever could:

"Before we were given this solar system, we used to live in total darkness, and the only remedy was to light up dry reeds for light inside the house. But when we were given the solar system, our children started revisiting their books, and life is better now."

Vesitiina's story is the story of this program. Families who once burned dry reeds and firewood for light at night can now power their homes cleanly and reliably. Children can read and study after dark. The health and environmental toll of indoor smoke – gone. And with micro-grids expanding access further, even more households are joining that shift every month.

After two years, here is what that looks like at scale:

- 📍 **Seven countries reached** – Uganda, Tanzania, Ghana, Nigeria, Togo, Democratic Republic of Congo (DRC), and Benin.
- 🌍 **650 people mobilised** at our launch alone, across 11 coordinated actions in a single day.
- ✊ **25+ actions on AfrikaVuka Day**, with communities across the continent coming together to demand a renewable future.
- 🤝 **Two REPower country chapters established** in Tanzania and Uganda, building a strong organising base.

The results are clear: this model works. Communities aren't waiting to be rescued – they are training, organising, and building. And so now, we are doing what the results are telling us to do. **We are taking this same approach and expanding it across the region, so that more communities can access clean, affordable, renewable energy, owned by the people who need it most.**

This is the kind of progress and positive change we're building together when you support 350's work.

Thank you for making REPower Afrika real – and for helping us make an impact.

In solidarity,

Lynn Kamande
East Africa Organiser, 350

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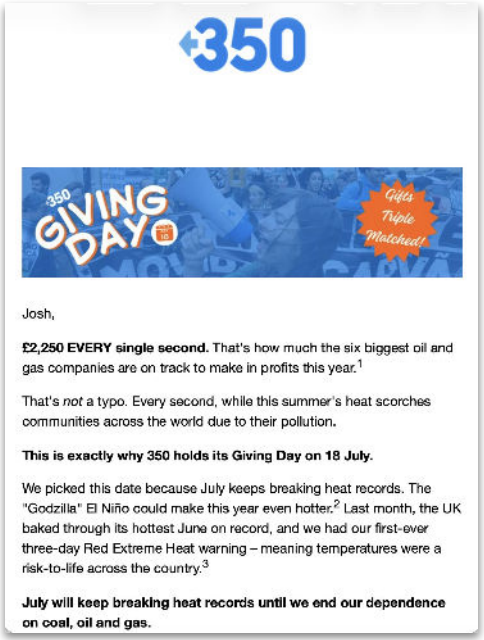
A Rational-led email

- A rational email that leverages your values and WHY you exist, but pushes forward a target we need to achieve together



+350

Josh,

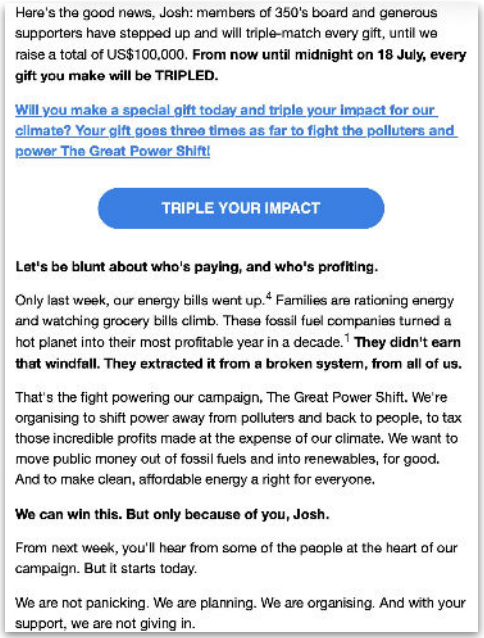
£2,250 EVERY single second. That's how much the six biggest oil and gas companies are on track to make in profits this year.[1]

That's *not* a typo. Every second, while this summer's heat scorches communities across the world due to their pollution.

This is exactly why 350 holds its Giving Day on 18 July.

We picked this date because July keeps breaking heat records. The "Godzilla" El Niño could make this year even hotter.[2] Last month, the UK baked through its hottest June on record, and we had our first-ever three-day Red Extreme Heat warning – meaning temperatures were a risk-to-life across the country.[3]

July will keep breaking heat records until we end our dependence on coal, oil and gas.



Here's the good news, Josh: members of 350's board and generous supporters have stepped up and will triple-match every gift, until we raise a total of US$100,000. **From now until midnight on 18 July, every gift you make will be TRIPLED.**

Will you make a special gift today and triple your impact for our climate? Your gift goes three times as far to fight the polluters and power The Great Power Shift!

TRIPLE YOUR IMPACT

Let's be blunt about who's paying, and who's profiting.

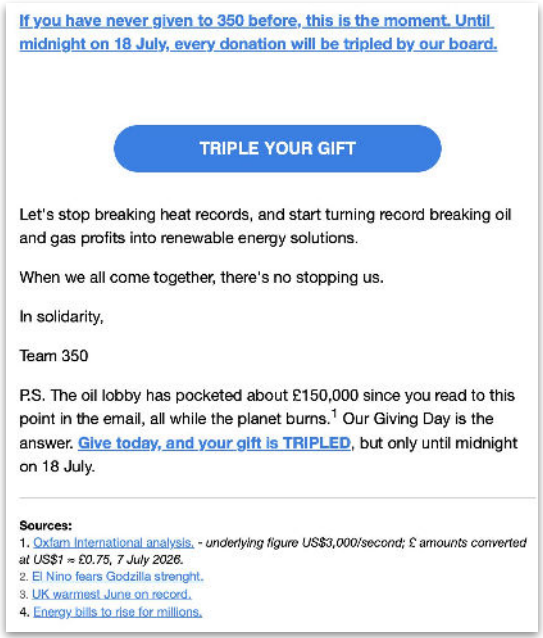
Only last week, our energy bills went up.[4] Families are rationing energy and watching grocery bills climb. These fossil fuel companies turned a hot planet into their most profitable year in a decade.[1] **They didn't earn that windfall. They extracted it from a broken system, from all of us.**

That's the fight powering our campaign, The Great Power Shift. We're organising to shift power away from polluters and back to people, to tax those incredible profits made at the expense of our climate. We want to move public money out of fossil fuels and into renewables, for good. And to make clean, affordable energy a right for everyone.

We can win this. But only because of you, Josh.

From next week, you'll hear from some of the people at the heart of our campaign. But it starts today.

We are not panicking. We are planning. We are organising. And with your support, we are not giving in.



If you have never given to 350 before, this is the moment. Until midnight on 18 July, every donation will be tripled by our board.

TRIPLE YOUR GIFT

Let's stop breaking heat records, and start turning record breaking oil and gas profits into renewable energy solutions.

When we all come together, there's no stopping us.

In solidarity,

Team 350

P.S. The oil lobby has pocketed about £150,000 since you read to this point in the email, all while the planet burns.[1] Our Giving Day is the answer. Give today, and your gift is TRIPLED, but only until midnight on 18 July.

Sources:
1. Oxfam International analysis. - *underlying figure US$3,000/second; £ amounts converted at US$1 ≈ £0.75, 7 July 2026.*
2. El Nino fears Godzilla strenght.
3. UK warmest June on record.
4. Energy bills to rise for millions.

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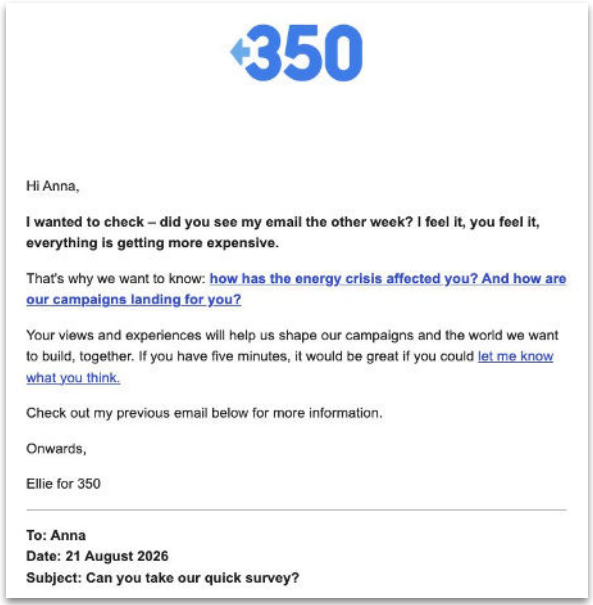
A False Forward email

- A false forward that repeats the CTA form the main email, sent from a more senior member of staff or a different signatory, that uses false forward tactics



Hi Anna,

I wanted to check – did you see my email the other week? I feel it, you feel it, everything is getting more expensive.

That's why we want to know: **how has the energy crisis affected you? And how are our campaigns landing for you?**

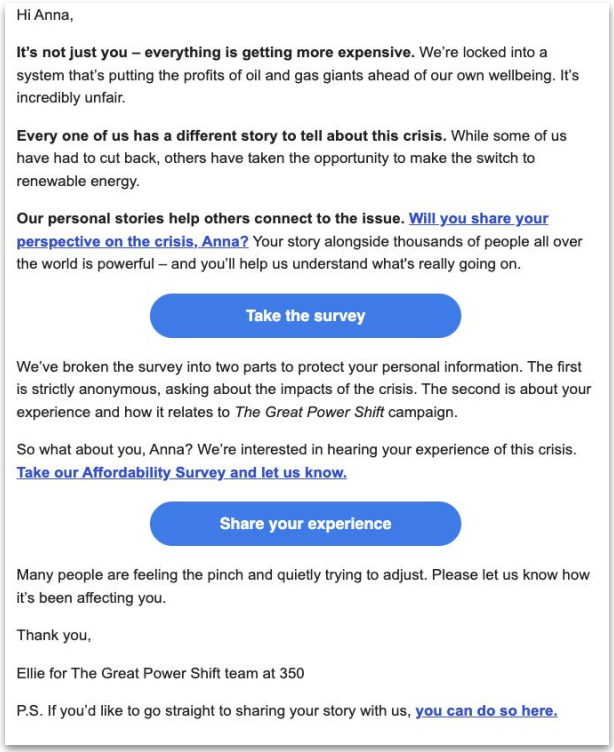
Your views and experiences will help us shape our campaigns and the world we want to build, together. If you have five minutes, it would be great if you could let me know what you think.

Check out my previous email below for more information.

Onwards,

Ellie for 350

To: Anna
Date: 21 August 2026
Subject: Can you take our quick survey?



Hi Anna,

It's not just you – everything is getting more expensive. We're locked into a system that's putting the profits of oil and gas giants ahead of our own wellbeing. It's incredibly unfair.

Every one of us has a different story to tell about this crisis. While some of us have had to cut back, others have taken the opportunity to make the switch to renewable energy.

Our personal stories help others connect to the issue. **Will you share your perspective on the crisis, Anna?** Your story alongside thousands of people all over the world is powerful – and you'll help us understand what's really going on.

Take the survey

We've broken the survey into two parts to protect your personal information. The first is strictly anonymous, asking about the impacts of the crisis. The second is about your experience and how it relates to *The Great Power Shift* campaign.

So what about you, Anna? We're interested in hearing your experience of this crisis. **Take our Affordability Survey and let us know.**

Share your experience

Many people are feeling the pinch and quietly trying to adjust. Please let us know how it's been affecting you.

Thank you,

Ellie for The Great Power Shift team at 350

P.S. If you'd like to go straight to sharing your story with us, **you can do so here.**

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Getting Started!

Three

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Soft opt-in is not right for every organisation in their current situation. Ensure that it would be the right fundraising marketing approach for your charity, donors and beneficiaries.

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Some first steps...

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Train staff to understand when the exemption can be relied upon

Working group: Successful adoption will require cross-team working to align compliance alongside day-to-day execution.

Look at the technical set up: Adapt your CRM to maintain the different levels of consent.

Review journeys: Identify any messaging that wouldn't be appropriate for those with Soft Opt-in consent

Privacy policy: revise it to take account of your use of 'soft opt-in', and any other policies and procedures that may be affected by it.

Document the decision: Charities need to explain why someone is receiving marketing from them and be ready to justify how the soft opt-in is being used.

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Soft Opt-in is a GDPR-level change.

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Soft opt-in will take your contactable supporter base from this…

Back to this!

Complete this sentence:
“We’re implementing soft opt-in because…”

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And it will take your team from this...

To this!

Build your digital fundraising skills, products and more with some free resources...

Or get in touch:
hello@hynt.studio

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