

# How well are your fundraisers?

Exclusive in-depth research by CLAIRE WARNER shines a light on the state of wellbeing and mental health in the sector

Even before the coronavirus outbreak, fundraiser wellbeing had been rising on the sector's agenda for some time. From documented reports of bullying and sexual harassment to the long-running commentary on the high turnover of fundraising staff, this has been bubbling just below the surface for a number of years.

The need to address this issue is self-evident. In the Charities Aid Foundation's Charity Landscape report published last year, charity leaders said income generation remained the number one challenge for organisations. Charities' reliance on fundraising and fundraisers has been brought into sharp focus by events of recent months.

Of the £77bn combined annual income of the 168,000 registered charities in the UK, over £70bn comes from voluntary income including donations, gifts, legacies and grants, trading incomes such as events, shops and lotteries, and charitable activities. With less than 1% of charities having an annual income greater than £10m and only around a quarter estimated to have reserves to cover three months' running costs, now more than ever, we need our fundraisers to be well, fit, motivated, focused, effective and productive.

Surely then, now is the time for charities to finally put the wellbeing of their fundraisers at the top of their agendas.

### The need for research

But where to start? Research into the wellbeing and the mental health of those working in the charity sector has not been widespread. Apart from a 2013 study into wellbeing in fundraising in the US, there is precious little data to go on. To address this, Charity Well – an initiative established to specifically shine a spotlight on the wellbeing of fundraisers in the UK – launched in 2018 and undertook an extensive study into wellbeing last year.

The online study was in two parts: the first, to identify what the causes behind stress and other challenges in the sector are and their impact on wellbeing; and the second, to confirm the incidence and wider

impact of these causes. Part one of the survey took place between May and July 2019, with 133 fundraisers taking part. Part two ran between October 2019 and February 2020, with an additional 567 fundraisers responding.

## “Now more than ever, we need our fundraisers to be well, fit, motivated, focused, effective and productive”

Participants were asked about non-fundraising issues and challenges that affected their ability and inclination to fundraise; what impacted their physical and mental health, including anxiety and stress; and the occurrence of those issues and challenges.

### Fundraiser churn

One of the first things to examine when looking at wellbeing and job satisfaction levels is the high turnover in the sector. The survey found that the average time fundraisers had been in their current post across all respondents was two years and eight months. The longest in post was 25 plus years and the shortest less than a year.

So what is behind this instability?

Only three fundraisers across the whole survey said that pay was the main cause of them seeking a new role, with 64% saying they felt their current employer offered fair pay and working conditions. Instead, limited opportunities for development, lack of training, lack of flexible working and looking for a new challenge were more commonly cited reasons.

Worryingly, poor management and leadership was cited frequently as the reason for leaving a role. A total of 83% of respondents said issues relating to this were among their reasons for looking for a new job. The comments of one respondent summed up the feelings of many: “Poor management, poor trustees, treatment of fundraising – and therefore fundraisers

– as a cost to be minimised rather than an investment, are all reasons. Setting impossible targets and then concluding that it is a failure of fundraising when these are not met, not a failure of governance, is also a common perception.”

In fact, management and leadership seem to be key factors in a wider disillusionment in the sector, with only 12 out of 700 fundraisers not making specific comments about issues relating to management and leadership abilities in their responses.

Just 57% of fundraisers agreed that their current line manager has the skills and experience to manage them and their team colleagues. Only 30% agreed that performance is managed well across their organisation; with just 39% agreeing that difficult situations and conversations are dealt with well, and only 35% agreeing that

different personalities and characters are well managed.

### Promoting from within

One problem highlighted by the survey relates to systemic issues around promotion and career progression. The survey indicates that there may be some traction in the argument that the best fundraisers don't necessarily make the best managers, with many respondents citing difficulties related to this.

One respondent spoke of their own personal experience: "I was approached by a charity to apply for their director of fundraising role. They were super complimentary

respondents said CEOs kept them informed of what is happening, with 43% saying the organisation's leader didn't understand their role and its challenges. Poor communication was cited as a challenge by 78% of the phase one respondents, and was referenced in more than half of the responses to the question: "What things are not done so well?"

One respondent highlighted bringing in talent from outside of the sector to help deal with such problems: "When my new manager was appointed, I was sceptical. She had no fundraising experience at all, but was 'sold' to us on her professional management experience. Now I wish everyone could be managed by a professional manager.

or not they are achievable has a large effect on motivation and wellbeing.

A total of 49% of fundraisers who took part in phase one of the survey cited targets as having an impact on their wellbeing. Across the entire survey, only 53% of fundraisers agreed that their current target was achievable (pre the Covid-19 outbreak); just 64% felt consulted or involved in the target-setting process; some 52% felt that those who were setting the targets had the skills or experience to do so; and only 33% agreed with the statement: "I rarely have to work more hours than I'm paid to achieve what is expected of me."

The message that services needed to be restricted or cut back because "fundraising hadn't achieved its targets" was also cited as a major demotivating factor.

## "We need to stop deluding ourselves that this is a problem which is going on in other charities and not in our own"

about my major gifts reputation and said they would like me to lead their team. I became responsible for a team of 10. I was awful at it and left within a year."

There were also questions about competency at chief executive level. Only 54% of

"The systems, structures and practices she has put in place have enabled us as individuals, and as a team, to work in a very different way. We are now encouraged to test and to try, and to share our learnings. We not only have clearly defined roles and expectations but are also encouraged to use our strengths to support the work of others. Our fundraised income nearly doubled last year and she is now being asked to share her methods with other managers."

With a lack of understanding of fundraising and poor management both being cited as issues, providing good quality management training for those fundraisers who do seek to take that development route would surely help to address these shortfalls.

### Bullying and harassment

Instances of bullying and harassment are becoming more frequently reported across the sector. In phase one of the study, the word bully was used by nearly half of the participants. In the wider incidence study in phase two, 44% of fundraisers had either experienced or witnessed bullying in their current role and 73% had done so at some point in their career.

One fundraiser commented: "Bullying from our chairman, public threats in meetings regarding probation period and fundraising without results and so on, with no regard for the time and effort involved in research and creating a strategy, have been commonplace."

Some 12% of fundraisers had either experienced or witnessed sexual harassment in their current role, and 38% had either experienced or witnessed it at some point in their career.

Meanwhile, 5% of fundraisers had either experienced or witnessed racial harassment in their current role, and 18% had either experienced or witnessed it at some point in their career. Some 6% of fundraisers had either experienced or witnessed harassment due to sexual orientation in their current role, and 14% had either experienced

### Unreasonable targets

Most fundraisers are passionate, results-driven people who want to make a difference in the world by securing the money necessary to effect change for beneficiaries. But the way in which fundraiser targets are set and whether



or witnessed it at some point in their career.

While no one offered specific comments as to their experiences of harassment based on race or sexual orientation, one fundraiser did comment: “Please be mindful of the additional obstacles that black, Asian and minority ethnic groups and LGBTQI people like myself face in an overwhelmingly white, middle-class industry. I am a late entrant to the sector because it’s challenging for people from minority groups to even get their foot in the door.”

### Passion exploitation

Despite all this, fundraisers still keep coming to work, with 87% saying that they were proud to work for their current employer.

However, data from the study and anecdotal stories from colleagues suggest that passion exploitation – whereby employers or management take advantage of passionate workers and legitimise such managerial practices – could be alive and well in the UK fundraising sector.

## “We need to value people over policy or process and tell our fundraisers that we know it is challenging”

Presenteeism in the charity sector has been linked with guilt and not wanting to let down beneficiaries. Only 56% of fundraisers agreed they are not usually contacted when they are on holiday or when ill by their current employer. And the same percentage said they don’t feel pressured to work if they were feeling unwell in their current role.

Overall, responses showed a range of attitudes towards wellbeing in the sector. Respondents to the statement “my organisation has a great health and wellbeing culture” were evenly split, with 30% agreeing, 36% disagreeing, and 34% neither agreeing nor disagreeing.

### Improvements and change

So what does all of this tell us about the group of people we rely on to secure income for our charities? And what can we do to bring about improvements and change?

One participant summed this up by saying: “I think that as a sector we are starting to acknowledge mental health issues, but all of the focus is on how you can improve this and manage it yourself, rather than on making sure that managers are appropriately trained and are encouraging and nurturing staff.”

There are certainly areas that we as fundraisers can work on to improve our own wellbeing, our resilience and our productivity. But some might be forgiven for suggesting that our own responsibilities to our resilience and wellbeing have already been tested, in most cases to the max. So what can we as a sector do?

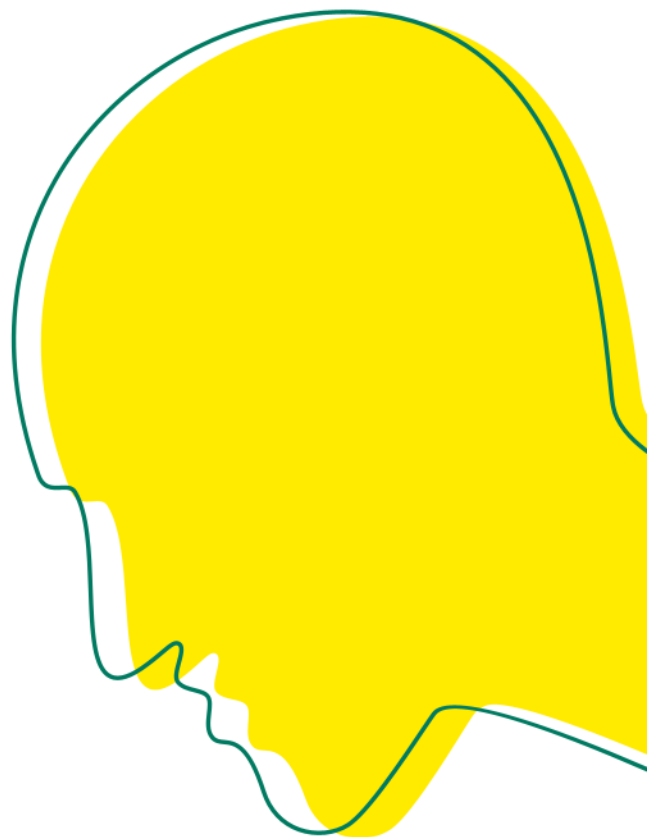
We need to stop deluding ourselves that this is a problem which is going on in other charities and not in our own. We can ask all our staff – not just fundraisers – how well they are managed, supported, inspired, motivated and able to perform the roles we need them to do. And most of all, we can commit to training and upskilling those who manage and lead within our charities

with the skills necessary to manage and lead well. We can treat our staff as our greatest asset and our most valuable resource.

We can also prevent bullying and harassment of any form and act strongly and decisively to defend those who tell us they are struggling from the attentions of perpetrators.

We need to value people over policy or process and tell our fundraisers – those in work and those furloughed – that we know it is challenging. We need to reassure them that pulling us and our charities through the coming weeks and months is a collective responsibility, not theirs alone.

We can also work with them to set targets which are challenging but achievable and give them the tools to do it. Then they can do what they do best – bringing to life the stories of our beneficiaries and driving the change we and they want to see happen in the world. ■



## Key findings

- **2 years 8 months** – the average time in current post across all participant fundraisers
- **87%** are proud to work for their current organisation
- **64%** feel their current employer offers fair pay and conditions
- **61%** would recommend their current charity as a good employer
- **55%** feel they receive appropriate recognition for their work
- **53%** have access to the learning and development they need to do their jobs well
- **47%** have access to the things they need in order to do their jobs well
- **40%** see themselves still working in the same organisation in two years’ time
- **36%** say their workload is achievable in the hours for which they are paid
- **25%** believe there are good career opportunities for them at their current organisation
- **26%** said they have had time off with stress during their current role
- **23%** said they have never experienced significant or prolonged work-related stress in their career



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