



the **FSI** ●

# IMPACT REPORT

2019/20

I



# CONTENTS.

## Impact Report 2019/20

|                            |    |
|----------------------------|----|
| I. About us / Introduction | 04 |
| II. Our Impact             | 06 |
| III. In a nutshell         | 08 |
| IV. Webinars               | 12 |
| V. Training                | 14 |
| VI. E-learning             | 16 |
| VII. Advice Hub            | 18 |
| VIII. Conference Events    | 20 |
| IX. Sustaining ourselves   | 24 |
| X. Annual Accounts         | 26 |

# About Us Introduction



**Our Vision:** A world filled with independent, effective and accountable charities with the belief, passion and capacity to achieve their vision.

**Our Mission:** To build and share knowledge, to elevate the voice of small charities with policy makers and the public, to build leadership in small charities and to support small charities to raise vital funds to meet the needs of their beneficiaries.

**Our Values:** Empathy; Energy; Excellence; Persistence and a Sense of the Possible

Who we are

**Page 04**

In a nutshell

**Page 08**

Annual Accounts

**Page 26**

## An Introduction

# Who we are.

At the FSI, we **love small charities**. Every day we are inspired by the amazing impact created by volunteers, trustees and teams working across the UK and internationally, and equally we work hard every day to help small charities make even more impact.

We do this by providing free and heavily subsidised training, advice, and conferences, as well as specialist consultancy and accredited Fundraising Qualifications. When your small team is just trying to get on with making a difference in the world, the challenges of raising funds, evidencing impact, and planning and governing effectively can feel overwhelming. We're there, by each charity's side, helping them navigate and sharing our expertise.







In the final quarter of the year, the world changed with the UK locking down due to the coronavirus pandemic. We are hugely proud that we converted all our work to digital delivery almost immediately, cancelling nothing – deeply aware that small charities were now going to need our support more than ever. We're even prouder that evaluations show that online training was as impactful as face-to-face, and we're excited for the possibilities this opens up going forwards.





Our impact  
in 2019/20.



# We help small charities make a bigger impact.

The FSI delivers high-quality training and online learning in fundraising, governance, strategy and impact measurement. In 2019/20 we delivered learning opportunities to **3,091** people.



# In a Nutshell.

Through our programmes in 2019-20, we aimed to:

## Build the skills and knowledge small charities need to thrive. +

We want to level the playing field by providing affordable, high-quality and practical training in fundraising, governance, strategy and impact measurement. From interactive full-day courses and inspiring conference talks, to free 1:1 advice sessions with experts and perfectly portioned 90 minute webinars (all costing under £30 to attend), to self-guided e-learning and hands-on consultancy support, we are the go to for thousands of small charities.

**99%** rated the trainer or advisor as good or excellent

**95%** would recommend to a colleague or peer

**86%** demonstrated an improvement in skills

**88%** improvement in knowledge

## Empower charity teams to build their confidence and network. +

The pressure in small charities is immense, and many people can feel isolated or lost. The informal and formal networking and peer support opportunities of our events is crucial to the long-term resilience of charity leaders and staff.

**90%** increased confidence through our events.

*"What a truly inspiring and informative webinar! So much information and some lovely new friends too!"*

*Tweet from @AJ\_Fund\_*

## Champion and celebrate small charities and their supporters.



Through the annual **Small Charity Week** campaign. Following the celebrations of our 10th anniversary in 2019, this year's Small Charity Week was a very different event as COVID restrictions continued having a massive impact on charities and their beneficiaries. Nonetheless, we were really excited to partner with other infrastructure organisations for the first time to deliver the week online, engaging hundreds of charities through online competitions, fundraising prizes, conferences, webinars, Big Advice Day, and social campaigns. Huge thanks to our friends at NAVCA, Small Charities Coalition, NCVO and Localgiving, as well as our sponsors and of course the small charity participants.

## Continue to build partnerships across the charity, funder and corporate sector.



We love working with others who share our passion for small charities. This year we have been delighted to partner in many ways, such as:

- Collaborating with local infrastructure bodies and funders to deliver our high quality training to local groups and grantees
- Continuing to expand our Funder Plus offer with City Bridge Trust, Lloyds Bank Foundation and Aviva Community Fund
- Working with our valued sponsors and exhibitors who help make our events possible.



## Highlights

# In a Nutshell.



In 2019-20, we delivered:

Support to  
**3,091** People

**228**  
Advice  
Clinics

**74**  
Webinars

**2019/20**

**60**  
Training  
Courses



62  
Consultancy  
Projects

3  
Conferences

#advicehub

@theFSI

#webinar



Staffordshire Sight Loss Association  
@SightLossStaffs

Inspiring stuff from @TheFSI today at their virtual #FundraisingConference, lots of really useful advice and information and great to mix with other charities during #SmallCharityWeek #ThankYou @theFSI #NeverMoreNeeded @SCWeek2020

4:42 PM · Jun 18, 2020 · Twitter Web App

#conference

#SmallCharitiesWeek



Catherine Franks  
@\_Catti

@TheFSI thank you so much for the amazing conference! It was great that it could go ahead online and it was a wonderful day of learning and connecting with others from #smallcharities! @SCWeek2020 #FundraisingConference #SmallCharityWeek



GIF

#training

#ThankYou



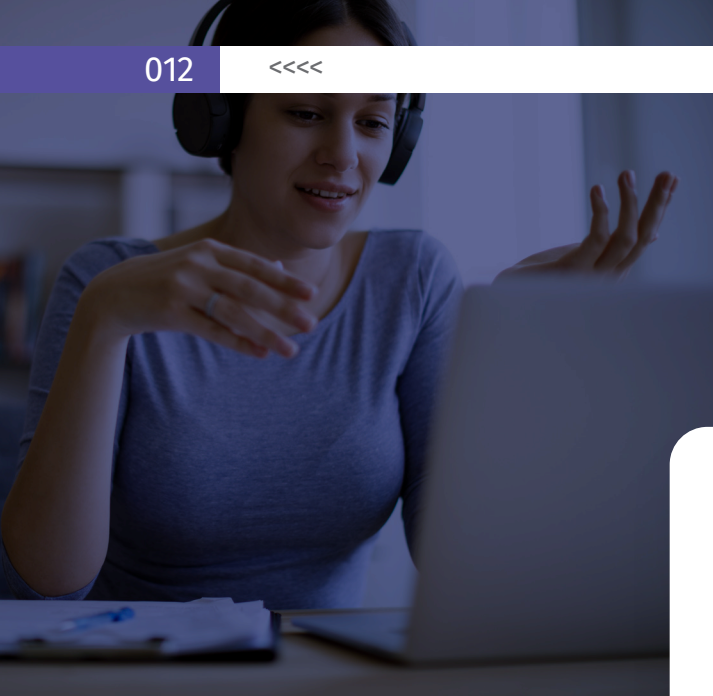
Carys Nelkon  
@CarysNelkon

thank you to @ambershotton and @TheFSI for the brilliant project management training yesterday, it's made for a very intense friday of MAKING BIG PLANS



#SmallCharities

#consultancy



Through the year  
we delivered

74

Webinars



to

1152

Participants



# Webinars.

Our 90 minute webinars offer a short overview of key training topics with an interactive format to facilitate shared learning. We delivered **74** webinars to **1,152** participants over the year.

---



***“I was really impressed at how much information was fitted into a short-time period without feeling rushed.”***

*Annie Rutherford - St Anza - Scotland's Poetry Festival*





# Training.

Our half-day and full-day training courses offer a deeper dive into key subjects for small charities. Training events were held in London, Nottingham, Sheffield, Glasgow, Brighton and Leeds. In response to the COVID-19 pandemic, in the last quarter of 2019-20 we moved our courses to a fully online format.



*“Excellent training! The trainer was knowledgeable, personable and kept the pace brilliantly. It was really useful to meet and network with others in the sector and learn about their experiences.”*

*Karen Mangan  
- The Insurance  
Industry Charitable  
Foundation*

We did not see a marked difference between outcomes or quality ratings for face-to-face vs online delivery. This is a testament to the team’s ability to pivot to adapt to rapidly changing circumstances, and also reflects our years of experience in delivering training in a digital format. We will continue to evolve our training offer in the year ahead, ensuring it adapts to meet the needs of our members and the world they are working in.

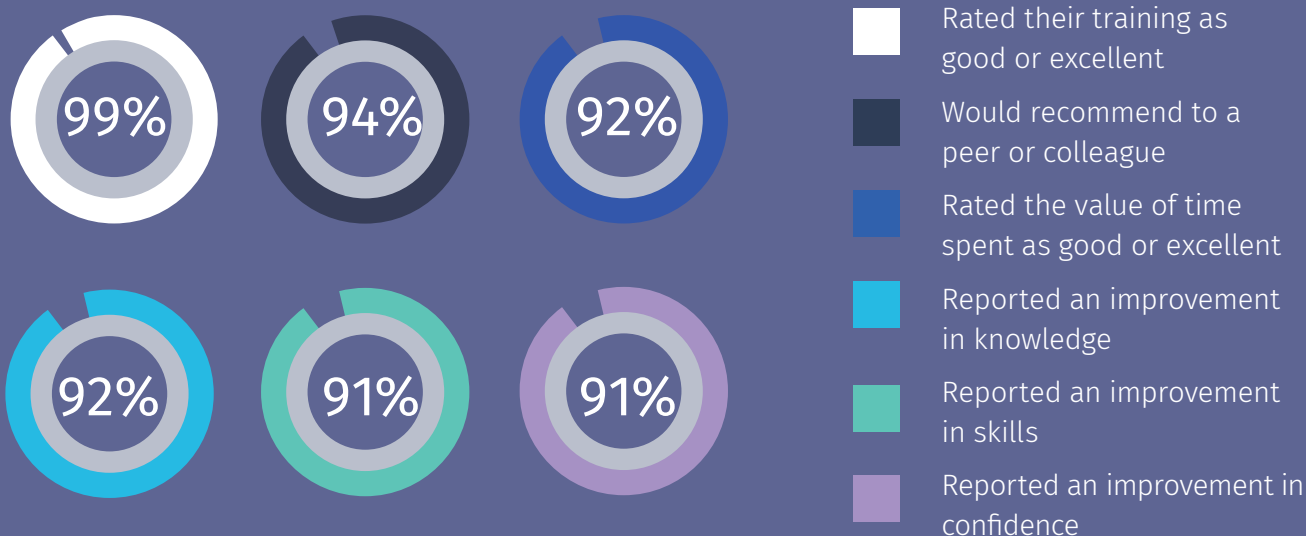
# 94%

WOULD  
RECOMMEND  
THE TRAINING  
TO A PEER OR  
COLLEAGUE



***“Overall, a really stimulating and rewarding day. I learnt a lot I can take back to my charity that will help us fundraise more effectively and work towards sustainability.”***

*Alex Whitton - Universify Education*



***“Brilliant courses! Step by step guides on how to do programme development and fundraising strategy in an achievable way for small charities with limited resources.”*** Kellie Grice - Adventure Under Sail

***“I felt the training was really practical, having templates to use in our situation will be really helpful, saving a lot of time. It's incredible value for money and really high quality.”*** Lea Lawton - Bath and Wiltshire Youth for Christ

***“Thank you so much - I am so impressed at how effectively you have pulled this into online training in response to Coronavirus, but I think it worked well and would attend online training again in the future”*** Sarah Hardy - De Morgan Foundation

# E-learning.

In 2019/20, the FSI added one further topic, **Donor Stewardship**, to our e-learning library. E-learning offers self-paced equivalents to our full day training courses, allowing learners greater flexibility and removing the need to travel.



98%

rated the trainer as good or excellent

would recommend to a peer or a colleague

98%

96%

rated the value for time spent as good or excellent

reported an improvement in knowledge

96%

100%

reported an improvement in skills

reported an improvement in confidence

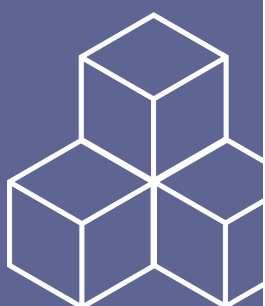
98%

Interestingly, these results suggest higher levels of outcomes attainment (increases in knowledge, skills and confidence) compared to live training, whether face to face or virtual. We had anticipated that these scores might be slightly lower given there is no peer interaction or opportunity to ask direct questions from a trainer. The increase in scores might be because learners are able to revisit specific content as they need it, affording more opportunity to put their learning into practice.



*“There's a lot of information! And a lot to do as a consequence. I think that I was unprepared for the level of work that it would create! But am excited at how it is achievable and the impact it will make. Thank you so much for providing this for a small, local charity. It will help us to take our financial planning to the next level.”*

*Michaela Carey-Slater - Baby Basics, Northampton Abuse Services (TDAS)*



One common reflection from the e-learning feedback was that although learners appreciated the level of information and detail, this could be daunting especially to someone new to fundraising. In the future, we will review our e-learning offer and consider how we can make further improvements such as smaller, bite-sized modules so that learners can access exactly what they need, when they need it.

In 2019/20,  
**119** learners  
accessed one of  
our e-learning  
courses.



# Advice Hub.

Our advice hub helps organisations address specific questions on topics that are important to them. Through our network of 32 volunteers, we delivered 83 advice clinics through the year. With the support of 56 volunteers, a further 145 advice sessions were held during Big Advice Day, part of Small Charity Week in June 2020.

---

“

*“Excellent service - exceeded expectations and the advice offered was over and above - thank you!”*

*Chloe Arrowsmith Jensen  
- Money A+E UK CIC*



*“[Our advisor] was absolutely fantastic! Researched what we do before the session and had a great understanding to be able to cater the advice to us personally. Has even been so kind as to offer outside advice since the session on how to best reach corporates through our website. He was very knowledgeable on the topic, we found the session very helpful and inspiring” Henry Broome - Arts 4 Dementia*

Through our network of

**32** volunteers



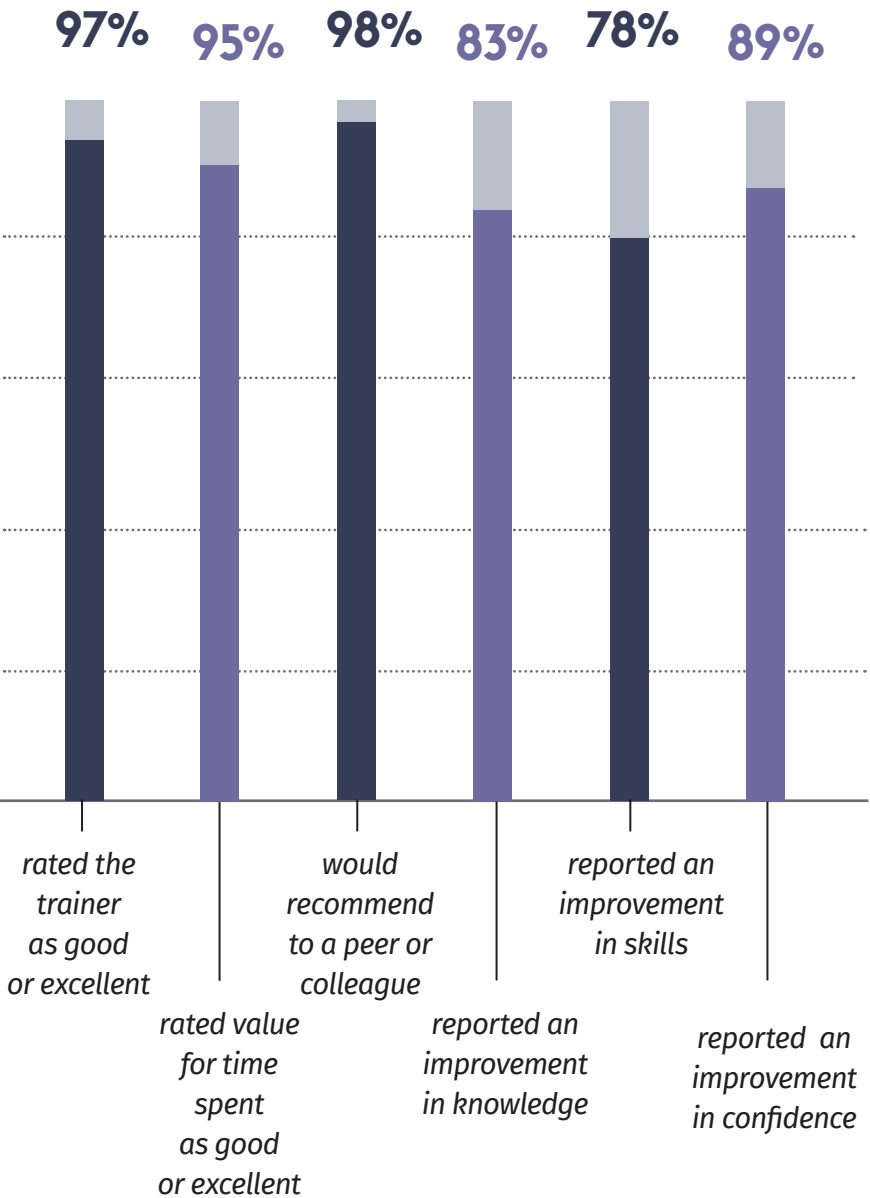
Through the year we delivered

**83** advice clinics



Plus an additional

**145** sessions during Big Advice Day, as part of Small Charity Week





# Conference Events.

We held three conferences in 2019/20; two **Fundraising Conferences** and a **Skills Conference**.



*"[The most valuable part was] being able to reflect on topics relevant to role and charity and benefit from content at a time when many other events are cancelled or postponed."* Lynne Stockbridge, Feed the Minds

# Northern Fundraising Conference.

*Leeds, October 2019*

## 156 delegates



heard from **8 speakers** covering subjects such as corporate fundraising, major donor fundraising, legacy fundraising, Facebook fundraising, and reaching new donors online.

**95%**

rated their overall experience as good or excellent



**96%**

would recommend the conference to a peer or colleague



**69%**

reported an improvement in skills



**78%**

reported an improvement in their knowledge



**77%**

reported an improvement in confidence



Our fundraising conferences tend to provide a lower score in improvements in knowledge, skills and confidence as there is not the same opportunity to put these into practice like in a more intensive training course. However, the scores this year do give us pause for thought and we will consider how we can improve the learning experience in the year ahead, potentially through greater collaboration with other conference providers.

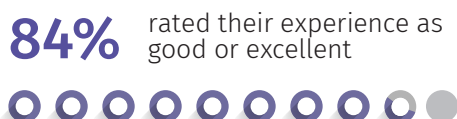


# Skills Conference.

## March 2020

Our Skills Conference provides our members the chance to learn from expert speakers on areas that are vital to the effective running of their organisation. The event programme featured topics highlighted within our Skills Gap Research, including Finance, HR, Leadership, Marketing and Governance.

The event was held on 24 March 2020 – just one week after the announcement of a national lockdown due to the COVID-19 pandemic. Our team pulled out all the stops to rapidly convert our event from a face-to-face format to an online format, so that the 200+ delegates could still access the skills and knowledge they needed.



Given the timing of the event, we anticipated lower scores than usual – primarily due to the challenges and uncertainty facing the sector at the time. We responded by making digital content available for 30 days so that delegates could access what they needed at a time to suit them. We were heartened to see that although some areas had dropped (notably value for time spent), we saw high levels of improvement in knowledge, skills and confidence – at a time when it was most needed by the sector.

*"I would like to thank the FSI for putting on this conference virtually. It has meant that if has been financially possible for our charity to attend without 'breaking the bank', being a small charity based in Plymouth. As a result, I have learnt so much valuable information and given me lots to take away and put to good use in our charity."*

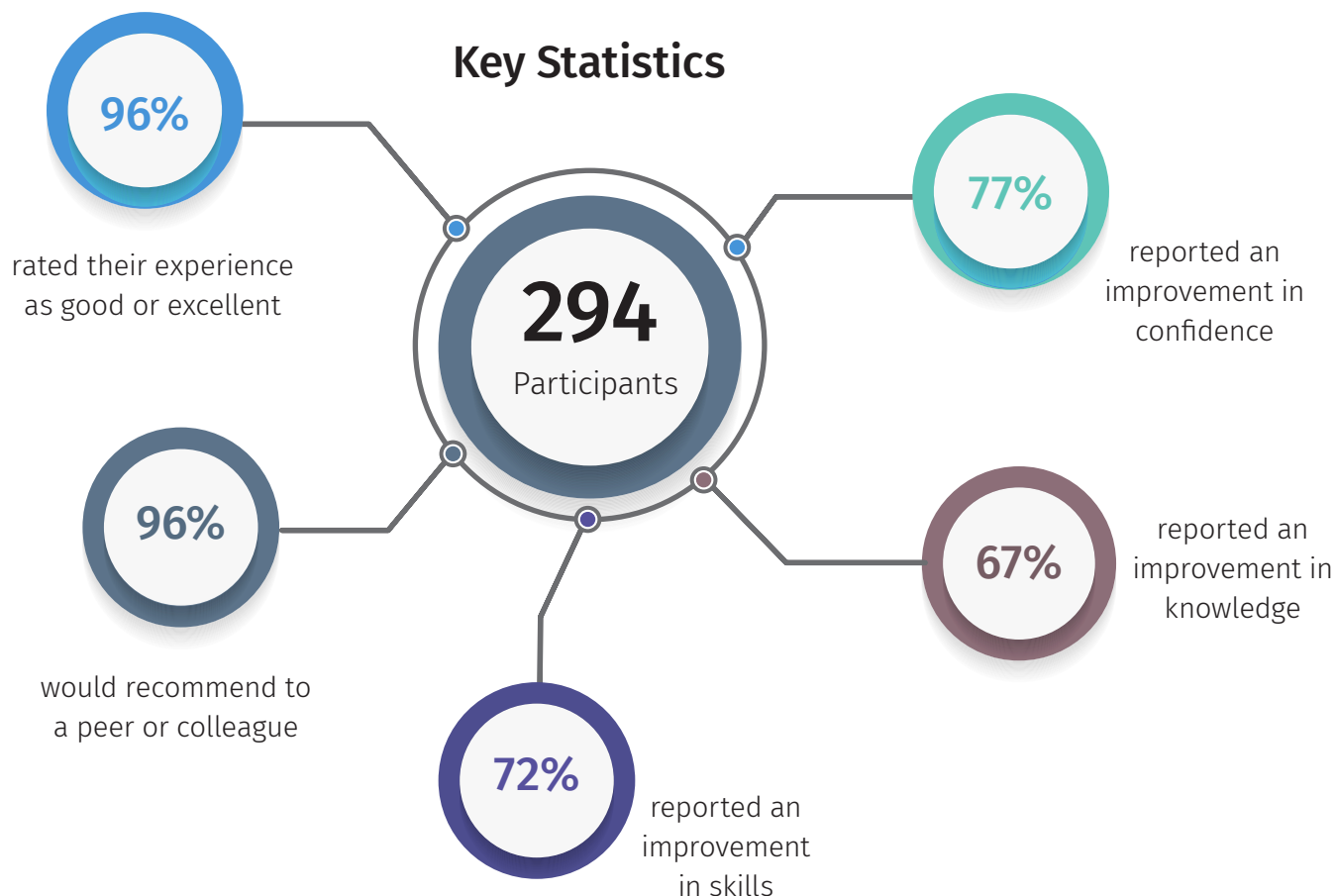
*Mags Truman, Well Connected*



## London Fundraising Conference.

### *Small Charity Week, June 2020*

Due to ongoing social distancing requirements, this event was held virtually. Speakers covered topics including digital fundraising, individual giving, and diversifying income when time is tight. The digital format was well-received by delegates, with 294 participating, more than previous fundraising conferences.



# Sustaining ourselves.

The FSI continues to evolve our 'mixed income economy' with income primarily through the following sources:

## 01. Grants and Contracts

We were delighted to be supported this year by 29th May 1961 Charitable Trust, City of London Corporation, Duchy of Lancaster Benevolent Fund, Garfield Weston Foundation, Hugh Fraser Foundation, the Open Gate Trust and the Leathersellers' Company Charitable Fund.

## 02. Mission-based Earned Income

Income earned through consultancy, fundraising qualifications and delegate fees: We worked with 62 consultancy clients in areas such as governance reviews, organisational strategy and business planning, developing theories of change and impact frameworks and devising fundraising strategies. We were delighted to work again this year with Lloyds Bank Foundation, Charities Aid Foundation and City Bridge Trust to support their grantees through consultancy. We also delivered 81 training courses and webinars for funders and other membership organisations including Local Trust, the Fore, Association of Chairs, the Law Centres Network and local Councils for Voluntary Service.



01.



GRANTS AND CONTRACTS

02.

MISSION-BASED EARNED INCOME  
THROUGH CONSULTANCY, FUNDRAISING  
QUALIFICATION & DELEGATE FEES

03.



PARTNERS, FUNDERS AND SPONSORS

03.

## Partners, Funders and Sponsors

Partnership working is essential to the FSI achieving its mission and we look to further and develop new partners in 2020-21.

We are delighted to partner with organisations who provide services that meet the needs of small charities. This year we were blown away by the support and understanding of our key partners, who stood with us as we navigated the pandemic and its impact on ourselves and our members. Thank you to our partners, National Cyber Security Centre, UK Charity Insurance, M&G Investments, Charities Aid Foundation, Blackbaud, Policy Bee and Premier Charity IT Solutions. Thanks also to our many sponsors and exhibitors including Liberty Accounts, Fundraising Regulator, TPP Recruitment, EachOther, Aviva, Vibrant Colour, Ansvar Insurance, The Much Loved Charitable Trust, Potheary Witham Weld Solicitors, and Veale Wasbrough Vizards LLP.

Thank you also to:

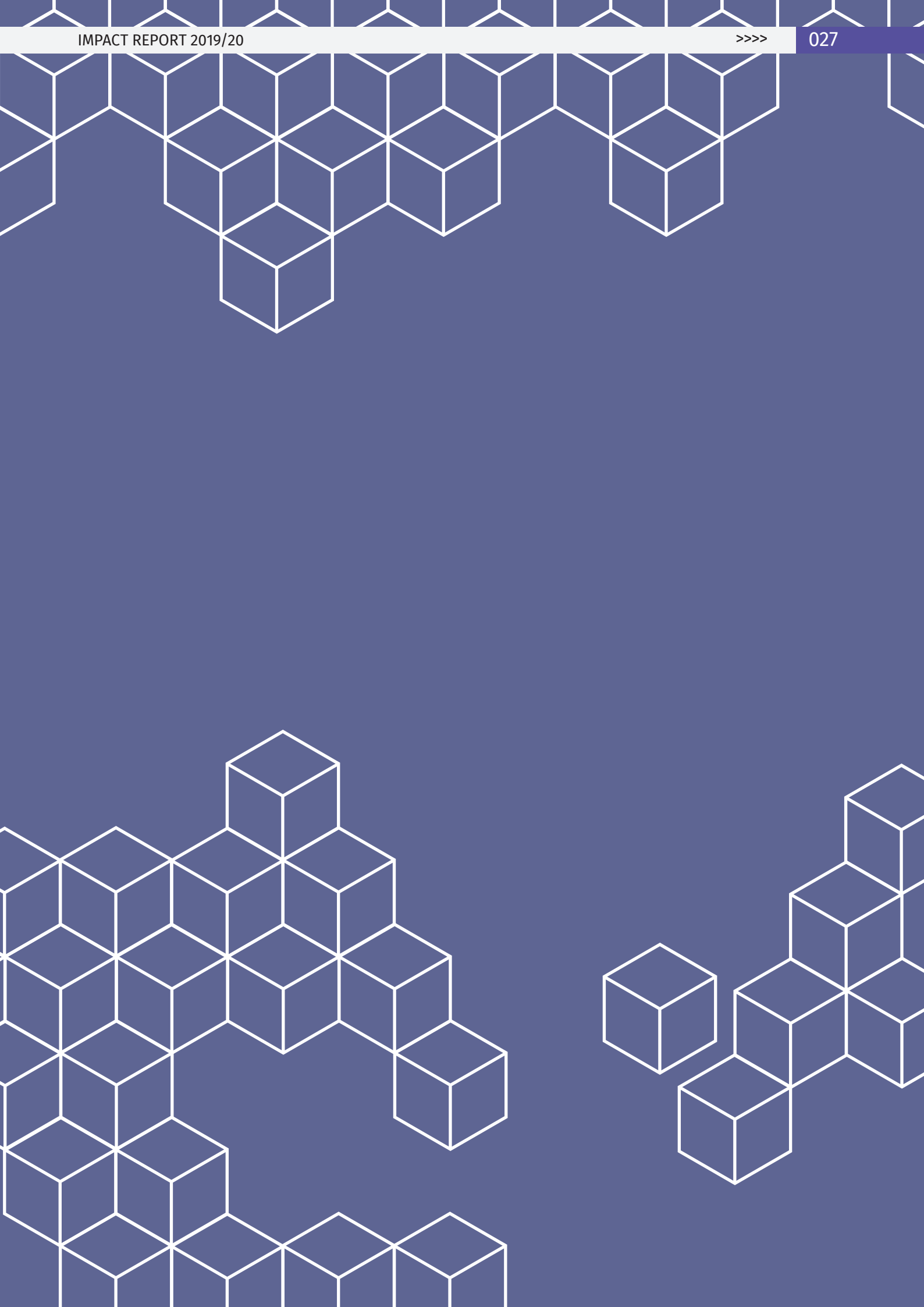
- **Funders:** Duchy of Lancaster, The Hugh Fraser Foundation, The 29th May 1961 Charitable Trust, City Bridge Trust, Leathersellers, Garfield Weston (Note) and Opengate Trust.
- **Small Charity Week 2020 Sector Partners:** NCVO, Small Charities Coalition, NAVCA and Localgiving.



## Annual Accounts 2019/20

# Facts & Analysis





# **Financial Statement for the year ended 20th June 2020**







# Thank you.

**Any question about this report please email us at:**  
[admin@thefsi.org](mailto:admin@thefsi.org)



# Impact Report 2019/2020

## Contact

The Foundation for Social Improvement  
68 Lombard Street  
London  
EC3V 9LJ

[www.thefsi.org](http://www.thefsi.org)

Registered Charity Number: 1123384

the **FSI** 