



Communications, press and influencing

a guide

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Lloyds Bank Foundation for England and Wales

We partner with small and local charities which help people overcome complex social issues. Through long-term funding, developmental support and influencing policy and practice, the Foundation helps those charities make life-changing impact. The Foundation is an independent charitable trust funded by the profits of Lloyds Banking Group as part of its commitment to Helping Britain Prosper.

**LLOYDS BANK
FOUNDATION**
England & Wales





With communications, it can be difficult to know where to start and what will work best for your charity. Whether you're staff or a volunteer and whatever your prior knowledge and experience, this toolkit is designed to help you achieve strong, impactful communications with as little demand on your time as possible.

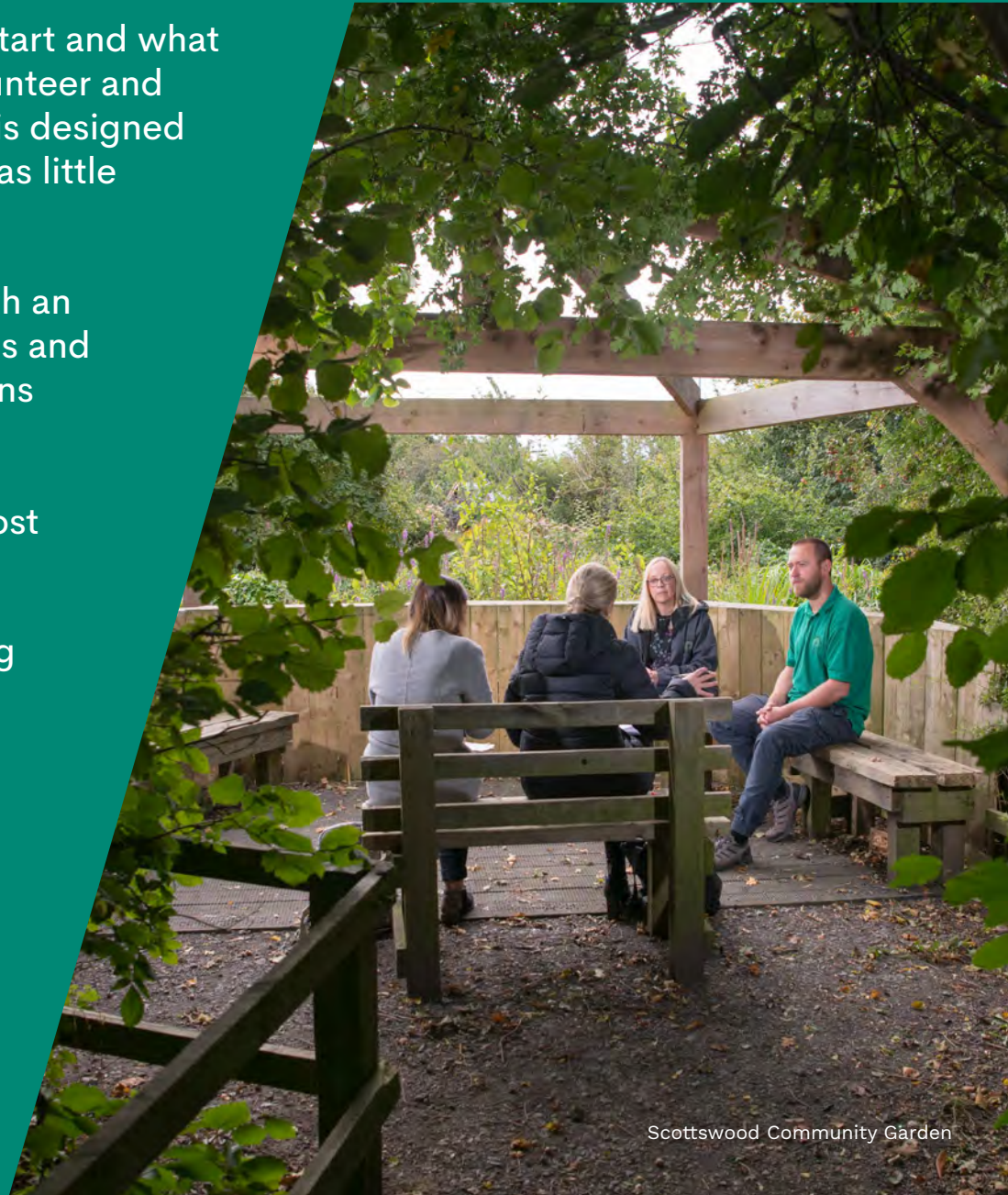
We have broken it down into 3 main sections, beginning with an overview of the 'building blocks' of all good communications and then taking a closer look at different types of communications including press, events, social media, influencing and campaigning, newsletters and websites. You can decide whether to read the guide in full or dive into the sections most relevant to you.

We hope you find this guide useful, and if there is something you think we should add, let us know so we can help other small and local charities improve:

media@lloydsbankfoundation.org.uk

Need more in-depth support?

Talk to your Foundation Manager about how your charity can access the [personalised one-to-one support](#) we can offer through our development programmes. Please note that this offer is only available for charities Lloyds Bank Foundation currently partner with.



Part one

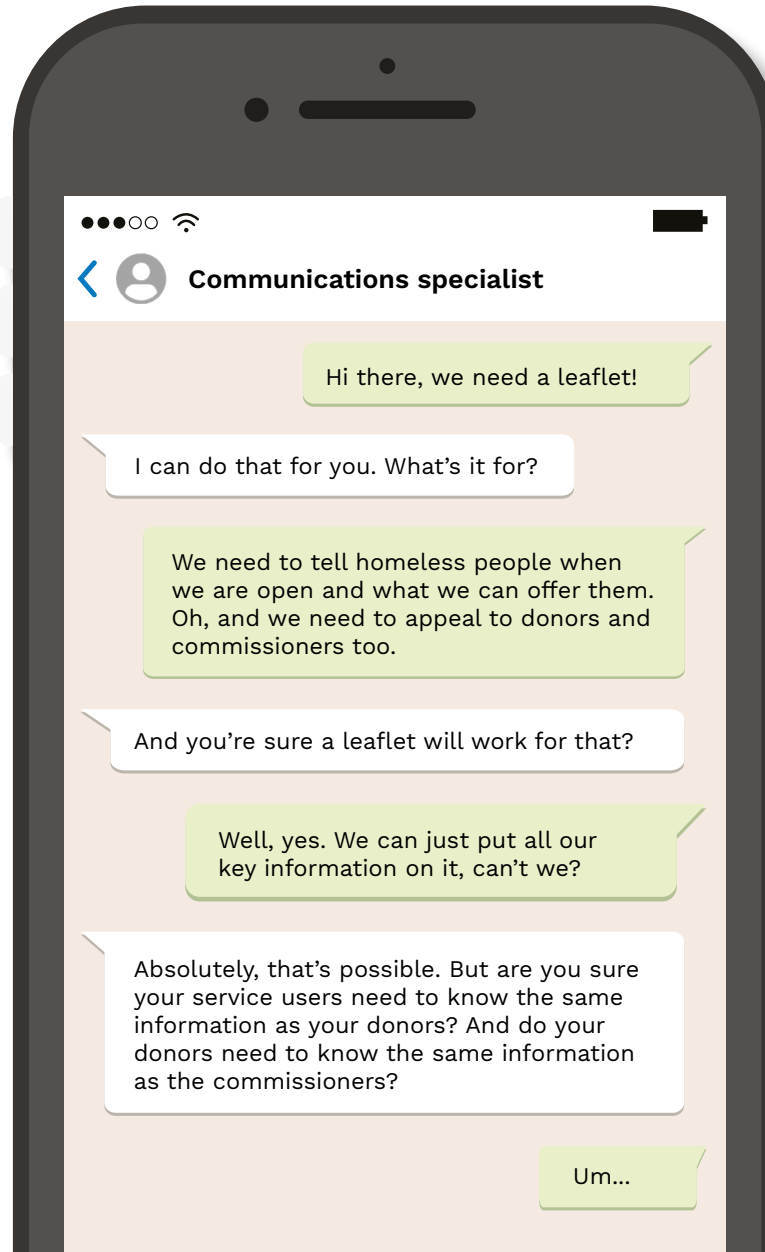
Getting started



You probably already know that communication is the process of sharing information. In the context of being a charity, well-planned and well-delivered communications will help you deliver your charity's strategic plan and objectives.

Sounds great! But how?

Imagine the following conversation between a small and local charity and an external communications specialist they've hired to do some work for them.



Sound familiar? It can be tempting to think of communications as one-size-fits-all, not least because in the short term, it seems like less effort to make one flyer for everyone than it does to make a whole bunch of different things.

But imagine if the charity in the scenario to the left produced three different types of communications. Perhaps an informative flyer for service users, a heart-wrenching appeal for donors, a detailed presentation for commissioners.

In the long run, the charity is much more likely to get what they need from each of those audiences if they give them personalised information in a format best suited to them.

The practicalities of working out which audiences need to hear which messages, and how it might be best to convey those messages to them, not to mention when, is all covered in the 'getting started' section of this guide. After that, section two looks at how to use that information to shape specific types of communications (such as press, social media, website and campaigning.)

So before you start, it's a good idea to think about what your goals are and what you are hoping to get out of your communications.

You are likely to have a few different goals. For example, you might want to fundraise, reach new service users, campaign on a social issue or something else.

Once you know what you want to achieve, you will be able to think about who you need to be communicating with and what you need to say to them.

Define your audiences

What does this mean and why should we do it?

It's no good having powerful, or potentially even life-changing messages if you are unclear on who to share them with! So it's important to think about this.

How to do it

Make a list of everyone you want to reach. Think about what you want to achieve and who you need to reach in order to achieve your goals.

We've made a start with some suggestions below. Tick the ones that are relevant to your organisation, especially those from your local region and/or the topics you work on, and **use the blank space to add your own.**

- | | |
|---|--------------------------------|
| <input type="checkbox"/> Local Authority | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Donors | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Local commissioners | <input type="checkbox"/> _____ |
| <input type="checkbox"/> MP | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Police | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Policymakers | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Potential donors | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Service users | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Service users' family and/or friends | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Trustees | <input type="checkbox"/> _____ |
| <input type="checkbox"/> Central government | <input type="checkbox"/> _____ |
| <input type="checkbox"/> NHS | <input type="checkbox"/> _____ |



Don't just stop at the list. Think about the type of people that fit into each category; try to get inside their heads and see how they think. You may find it helpful to draw pictures of these people to help you try to understand what motivates them, what gets on their nerves, what they are interested in, what they do with their time, their age, family life, appearance etc.

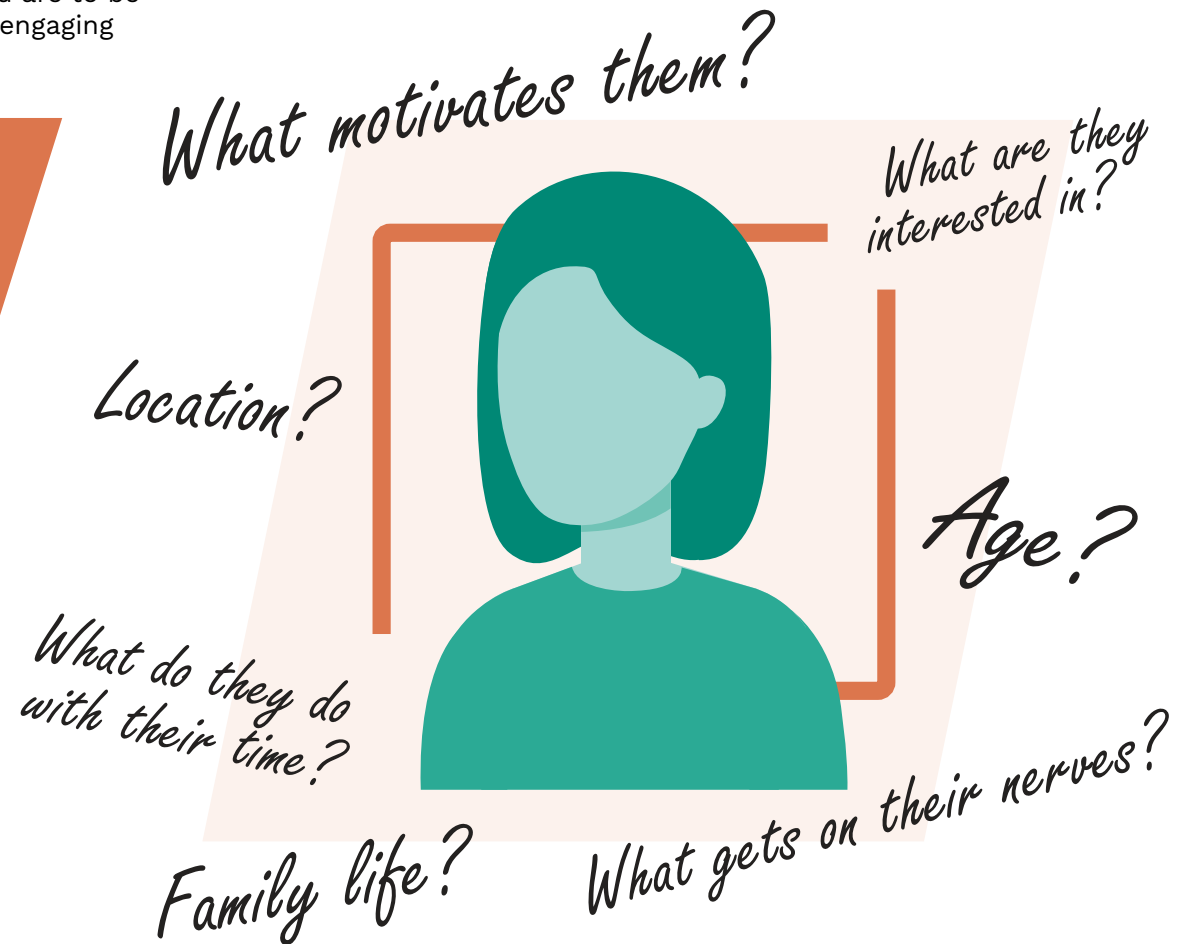
The main thing to establish is why they are or might be interested in your charity. What's in it for them – accessing support, helping to solve a problem, feeling part of something positive, or something else?

Remember, the more you understand your audiences, the more likely you are to be able to communicate with them in ways that they will find relevant and engaging and most importantly, that will inspire them to act.

Top tip: never assume...

You might be surprised by what you don't know about your target audience/s so it's always worth spending time listening to them. Is your target audience difficult to reach? Think about whether there are people with insight into the group that you could talk to. You could also consider who or what your target audience group already engages with and meet them where they are; going to them rather than trying to get them to come to you.

Use our table overleaf to plot out your audiences and understand what you need from them and barriers to engaging them.



Define your messages

What does this mean and why should we do it?

“Messaging” is how a charity talks about itself, including its purpose, goals, services and so on. Your messages will shape all the communications you put out, so it’s important that you spend a bit of time getting them right.

How to do it

Your charity’s key message(s) should express the main idea(s) you want people to understand and remember. Bear in mind that lots of other messages are competing for their attention, so make sure yours stands out and is easy to digest.

Start by thinking about:

- what you stand for
- why you are different
- what value you offer
- what problems you solve
- what makes your charity different
- your vision for your local community, your service users and wider society

Use this information to decide what key messages you should be promoting. Very simply put, this should be the key things you want people to know.

Top tip: it’s personal

Different messages are likely suitable for other audiences. Communication is all about sharing information — you’ll probably want to share different information with local commissioners and your service users, for example.

Have a go at using some of the following sentence starters to plot your messages...

As a charity, we believe in _____

We wish our service users knew that _____

Our MP needs to understand the importance of _____

If we were Editors-in-Chief of the local newspaper tomorrow, our front-page headline would be _____

We’d like our donors to be aware that _____

If we could tell the general public one thing, it would be _____

Our service users’ family and/or friends need to understand that _____

Measuring your success



Action



Output



Outcome

Let's look at the Action, Output, Outcome model. The action is the communication you produce; the output is what that action achieves; and the outcome is the useful change that output creates. For example:

Action: press release about a fundraising event you are hosting

Output: press coverage about that event

Outcome: attendees at the event who come ready to donate; those who can't attend donate anyway

Action: video about the issues faced by your service users

Output: engagement and shares on social media

Outcome: changed perceptions

Too many communications plans have exciting actions and ambitious outputs or metrics, but no tangible outcomes. When planning a communication activity, always have the outcome in mind. Beyond the metrics, what behaviour, belief or action of your target audience will you have changed?

Always ask yourself, *so what?* – what does this communication mean practically? What's the goal? If you can't see a connection between the output your action will create and the outcome you envision, you may need to rethink whether it is the most appropriate action to take.



Measuring your success



Think



Feel



Do

Another useful framework to bear in mind is think, feel, do. Try completing these sentences:

We want our target audience to think: 'I know _____

As a result of that knowledge, they should feel _____

And as a result, they will take the following action: _____

For example:

We want our target audience to think: 'I know one in five care leavers experience homelessness within two years of leaving care. I know that this charity ensures care leavers have the early-stage support they need to stop situations escalating that far.'



Checkpoint one

10 steps to success

Everything we've covered so far will form the basis of a communications strategy – the plan around how you'll create and deliver your communications. Before going further, check that you know how to:

1. **Define your audiences**
2. **Define your messages**
3. **Define your channels**
4. **Measure success**

At the start of each year review your comms strategy and set yourself one new audience you are going to try and reach and engage.

Chalk up your social media followers on the wall so all can see and encourage all staff to give you one thing each week that you can share.

Make your Annual Report engaging with a summary at the front of all your key stats at the front with a couple of case studies. Make sure you send the report, or at least that summary sheet out to all your key contacts each year with an upbeat cover letter.

Build a relationship with your MP – invite them to be guest of honour at an event; share info on what you do and the impact of key government policies, even invite them to hold their surgery at your offices. Similarly engage your local councillors.

Learn from others – think of your own favourite charity, look up their website and social media and see what you like. Similarly look up your closest competitor and see how they do things!

If you're overwhelmed by how much you could do to improve your communications strategy, start by choosing a few suggestions (some big, some small) from our 10 steps below:

1

2

3

4

5



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Be bold! If someone famous donates or supports your cause – reach out to them and see if they'll give you a quote of endorsement or front a quick video for social media.

Don't spend too long judging what makes a good campaign – take a 'test and learn' approach and get several campaigns launched in the same timeframe (it's ok if some of them fail as long as some succeed).

Always have a call to action in mind – and make sure everyone knows it. You might media train the CEO but your volunteer might get interviewed in the street and you want them to share your key message!

Make the most of trustees! Mine their networks, lean on them to amplify your messages, and make sure they know that Communications is everyone's job!

Be real. Honest messages, with real stories or insights always work best.

6

7

8

9

10



Part two

Sharing your stories



Building your Brand

A brand is an identifying mark or distinguishing feature - in other words, it's what makes you recognisable in a crowded arena. Your brand is how you present who you are as a charity and it affects all your other communications.

What should a brand include?

Contrary to popular belief, a brand is about a lot more than a logo! It's all about how you present yourself. So if your charity was embodied in a single person, its brand wouldn't just be the clothes it was wearing (the visual aspects) – it's all about your charity's personality, body language, tone of voice, the words it uses...

Establishing your brand

Although it's true that a brand is about more than the visuals, these are a good starting point. Your brand guidelines should include your logo, colour scheme and fonts as a minimum; keeping these consistent across all your charity's output will help it to be recognised.

Your brand could also include guidance on the type of language your charity uses. Your wording and tone represent you, so think about what your style will say about your charity. Is it positive? Upbeat? Serious? Formal or informal? It should also resonate with your audiences; for example, formal language may not be suitable for a youth charity.

You should also consider the language you use to talk about the issue(s) you tackle. For example, do you prefer the term 'sex work' or 'prostitution'? 'Children in care' or 'looked after children'?

Very often, these are decisions that have already been made, whether intentionally or through evolving practice - but writing it down into a brand document can help to formalise it and encourage fellow staff members to put it into practice too.

Top tip: it's not all about the logo

Whilst a logo is important, it's not the only part of a brand and you definitely don't need to invest loads of money into it. If you do decide you need a new one, could you use it as an opportunity for stakeholder engagement? For example, could it be a competition for service users and/or supporters to design a new logo?



Applying your brand

Now you have your brand sorted, you need to make sure you use it consistently. This means using it across everything you put into the public arena, so that everyone who encounters your charity will get a similar message.

Here are some ways to consider showing off your brand and embedding it amongst your target audiences:

- Posters/ flyers
- Business cards
- Roller banners
- Website
- Social media
- Annual reports
- Your office spaces
- Community spaces
- Christmas / festival cards
- Pens / notepads

Exercise: building your visual brand

You can't tell others who your charity is unless you know yourself. You may already have a clear picture of your identity, but it's always worth opening a discussion - you could be pleasantly surprised!

Invite a group of stakeholders. This could include service users, their loved ones, your staff, your volunteers, and anyone else involved with your charity who knows it well.

Ask everyone to list the words they associate with your charity, from the way people feel when they walk in the door to the benefits they feel from being involved. Start conversations - why did you choose that word? What image does this put in your head?

See which words and phrases come up regularly. If any are 'constructive criticism', put those aside to address another day - here we're looking to produce a positive identity.

At the end, the words you have will provide a picture of who you are as a charity: the traits you, your staff and volunteers possess, the role you play in the community and the benefit to the people you support.

Keep these words visible as you work on your branding. Make sure your logo, colours, fonts and pictures reflect the words you've come up with - is red a calming colour? Does a bubbly logo evoke a friendly atmosphere? When you're finished, hey presto! You've produced a visual brand for your charity!

More can always be done, but this is a great place to start.



Mural at Xtrax in Hastings

Case study: The Magdalene Group

The Magdalene Group, a charity we currently partner with, learnt the value of strong, consistent branding when they worked with an external consultant to consolidate their brand.

Their brand review reached right across how all the services they offer are packaged and presented.

Suzi Heybourne, Chief Executive of The Magdalene Group, explains:

“We used to run loads of different programmes and they all overlapped. It was confusing and difficult to explain to anyone new.

“Now we still run all the same activities, but they’re clearly divided into five distinctive strands. It makes it much easier to articulate who we are and what we do, whether that’s to new donors, local students interested in volunteering with us, or anyone else.

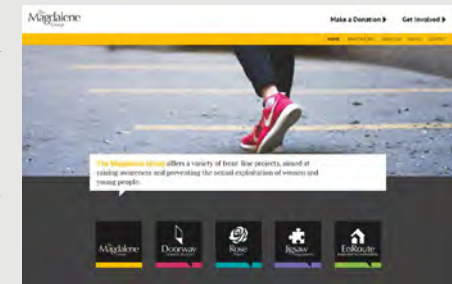


Everything just looks that bit more professional and that not only helps us deliver our services consistently, it makes us more attractive to funders too.

“We also looked at the way we present ourselves visually - so now each of our strands has its own colour, and we always use that colour when we talk about it, on our website and in our newsletter and so on. We’ve also got the same style of graphics on everything and one main font we stick to.

Now our brand is clear on our website, our flyers, our social media - everything just looks that bit more professional and that not only helps us deliver our services consistently, it makes us more attractive to funders too.”

The Magdalene Group’s latest annual report and their website show how their brand provides a consistent way to present who they are, what they do and the role they play in their community. For example, note the repeated speech bubble and colour palette.



Press

Engaging the Press

Press coverage could help your charity:

- Reach new audiences
- Generate donations
- Show your value in the community
- Raise awareness of the cause/s you work on

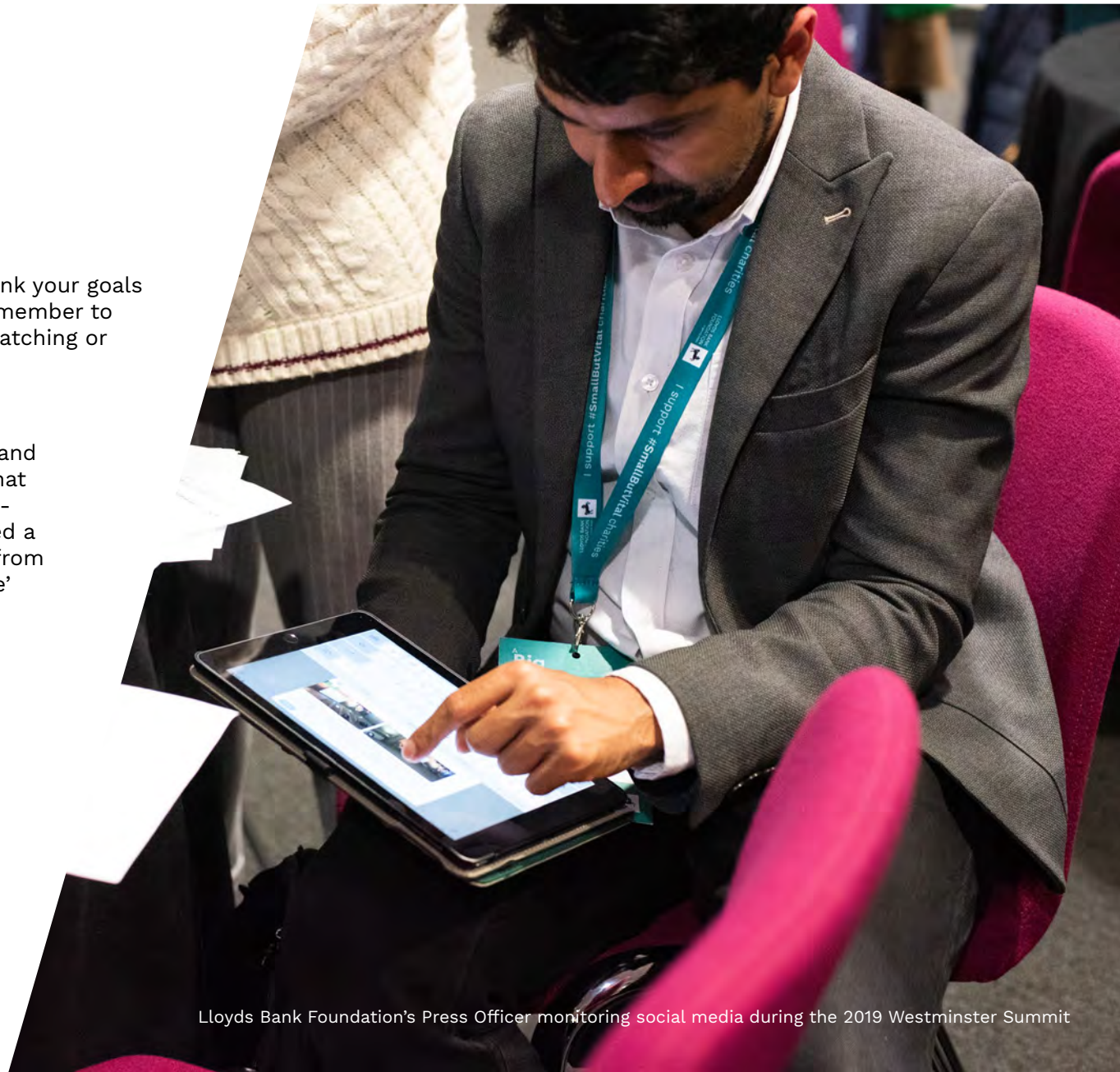
Think back to your [goal](#) and [audience](#) mapping work. If you think your goals could be achieved by being in the paper, on TV or on radio (remember to think about if your target audiences are likely to be reading, watching or listening!) then you can consider press a target channel.

What makes a story?

There are three main types of press coverage: news, features and opinion. News stories are ‘new’ – breaking news, something that has happened recently, whereas features are typically more in-depth research pieces. An opinion piece, sometimes also called a comment piece, is a first-person article (written by someone from your charity, be it staff, a volunteer or an ‘expert by experience’ service user).

If you want to secure press coverage around something ‘new’, like an upcoming or recent event, a new source of funding or a report or research you are releasing, you will need a press release. To be included in a feature piece, you would write a pitch to a feature writer, and opinion pieces also need to be pitched (in a slightly different way – we will cover how to pitch shortly.)

You could also write a letter to the editor of a newspaper, which works particularly well if you are responding to a specific article they have published or topic they have covered recently.



Case study: Types of press coverage

Click the phones to visit the articles

News

Wooden sleeping pods offer privacy to London's homeless

This is a news story because it talks about something 'new' – the pods The 999 Club introduced for homeless people in London.

Feature

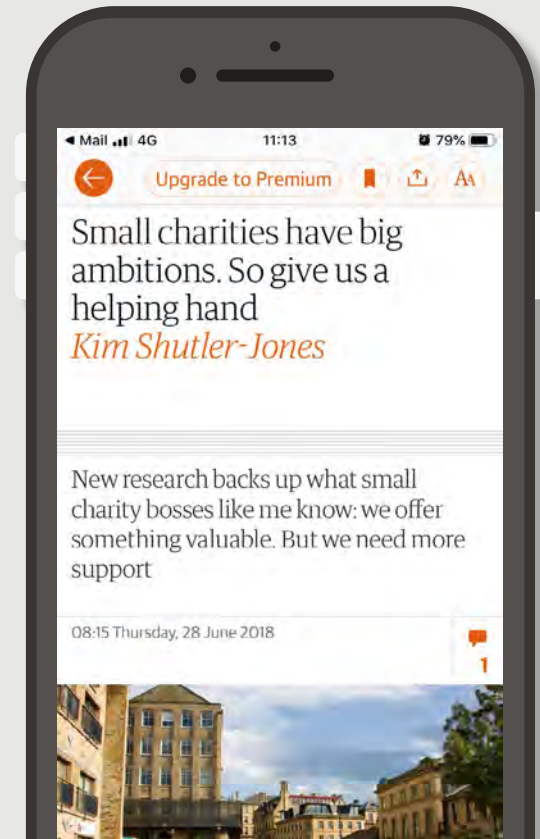
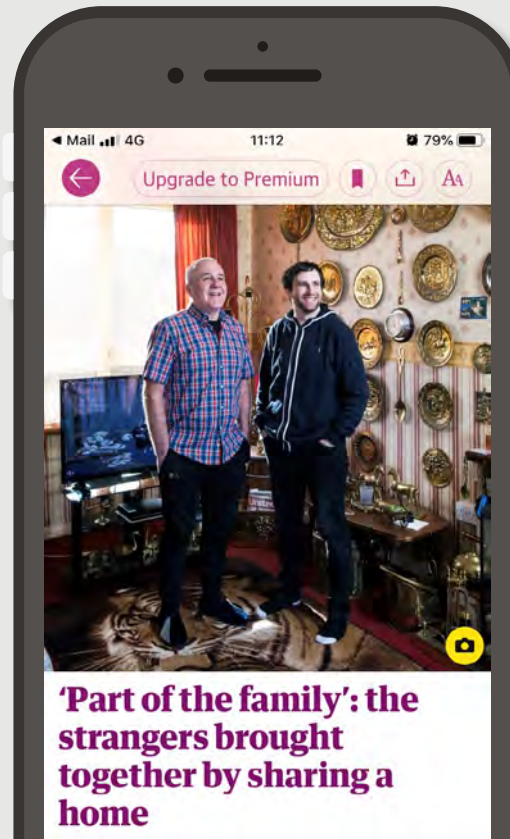
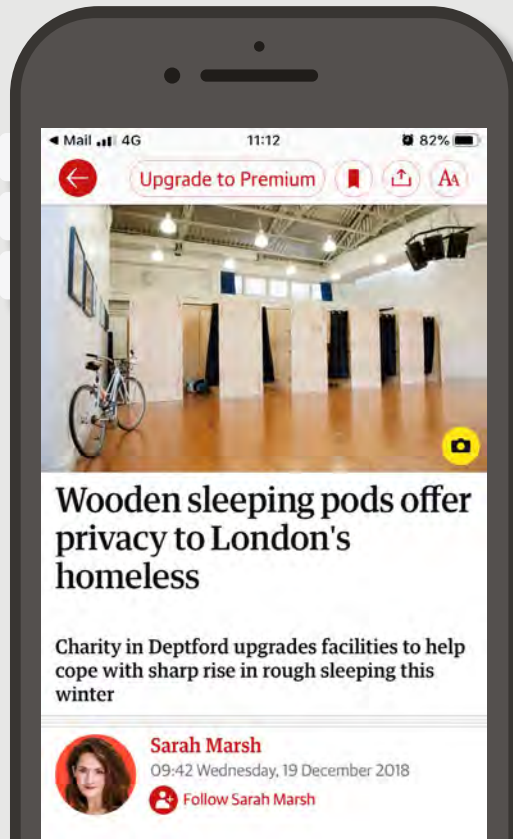
'Part of the family': the strangers brought together by sharing a home

This is an in-depth feature on a topic that is not time-sensitive. The programme featured, Homeshare, is one that has existed for several years and there was nothing 'new' about it at the time the article was published. Rather, it was presented as a human-interest story.

Opinion

'Small charities have big ambitions. So give us a helping hand'

This is an opinion piece in which the author, Kim Shutler-Jones, opens with the words "I'm the chief executive of The Cellar Trust, a small charity in Bradford which helps people with their mental health." In this way, she opens by telling the readers why she is qualified to offer an opinion on a current affairs topic.



Who to target and how to do it

The first thing to consider is who you will pitch your press release or feature idea to. Some publications will naturally be a better fit for your story, so look at relevant news outlets, both online and in physical newspapers. Consider their format, the stories they usually cover, the type of readers they attract and make sure it all aligns with your message and target audience. Do they have a regular feature that you could be part of?

Once you have a shortlist of publications, work out which journalists have interest in the topic you are covering and send them an email – you may find their email on the paper’s website or on their Twitter profile. If you can’t find their direct details, you could contact the newsdesk and someone will get back to you if they are interested in your story. You could also give them a call – even if you can’t speak to the journalist themselves, the person monitoring the phones will point you in the right direction if they think your story has potential.

What should go in your email?

The main part of your email should be your press release, your feature pitch or your opinion pitch.

Keep your subject line clear and succinct – journalists get loads of emails every day and they’ll delete yours without opening it if it looks boring or like spam – and make sure your contact details are clear so they can follow up quickly. An example subject line could be:

Top tip: be bold!

Local news outlets – print or radio – can often be the right place for you to send your press release or pitch, but don’t be afraid to pitch to national journalists if you think you’ve got a story of national interest.

Top tip: practice makes perfect

Practice telling your story like an elevator pitch so you’re able to tell journalists clearly whether it’s a good opportunity for them. Practice a few times in the mirror or with a willing colleague so you’re confident and fluent in your pitch when you do it for real. And just like when you’re emailing, state your attention-grabbing headline at the beginning of your call so they are interested enough to keep listening.

New email

To: **News room**

CC BCC

Subject: **Lincoln charity launches new initiative to help local homeless people today**

Also, remember to write a short line stating that you have photos and/or case studies available (if applicable) – journalists like these as they bring a story to life.

Don’t worry if you don’t hear back straight away. Persevere and don’t give up – your story idea may not be right for the first person you try but keep going!



Send

Writing a press release

A press release is a way of announcing something to people working in the press. Don't worry if you've never written one before; they aren't as complicated as they sound! We have written a template opposite for you to follow and have included a few of our own below for inspiration.



Calderdale charity awarded £100k grant from Lloyds Bank Foundation to continue vital work helping people struggling with mental health issues



Isle of Wight domestic abuse and disadvantage charity awarded £100k grant from Lloyds Bank Foundation to continue vital work helping people access advice, support and accommodation



Kathleen Kelly appointed Director of Collaboration to lead new place-based initiative LocalMotion



Lloyds Bank Foundation relaunches grants programme with a simpler, more flexible and transparent approach



Small and local charities awarded over £5.6m of new grants from Lloyds Bank Foundation to continue vital work helping people overcome complex social issues

Your
logo

Press Release For immediate release [date]

(If you want the media to use the story as soon as they receive it)

or

Embargoed for: [time/date]

(This is a good way of giving journalists time to prepare and to ensure they don't use it until a specified time)

Headline

(Start with a snappy headline, but not too clever)

Paragraph 1: Summarise the story - who, what, where, when and why. All key information needs to be in this paragraph.

Paragraph 2: Put in more details to flesh out the story you have outlined in the first paragraph.

Paragraph 3: "Quotes from you or someone relevant to the story." Don't try to cram too many points into one quote - each quote should make one point. Include charity staff and service user if possible.

Paragraph 4: Extra relevant information

<ENDS>

**For more information please contact [WHO]
[EMAIL] or call [PHONE]**

Notes to Editors:

- Provide background information in case they run a longer story
- Outline what you have to offer: pictures, interviewees
- Outline any additional relevant information or facts and figures but keep it short
- Include a relevant web link for your charity

Pitching a feature

A feature pitch is usually a bit less formal than a press release. Write a shortish email, perhaps a couple of paragraphs long. Grab their interest by saying why your topic is interesting and relevant specifically to their publication/readers (see 'who to target'), and then outline how you can help them. Can you provide statistics, access to case studies or experts to interview? Try to offer a few different angles, such as focusing on a particular project, the broader issues your charity works on or spotlighting a beneficiary with a particularly inspiring story; the journalist may also have their own ideas.

Pitching an opinion piece

Start by researching which specific papers print opinion pieces (or post them on their websites), and that it is the kind of paper your target audience will read.

Write an email stating what you want to write about, and why you are a good person to write about it. For example, reviewing the example in the case study above, Kim Shutler-Jones was qualified to write about being a small charity because she is the Chief Executive of one. Another example could be a service user having the authority to write about a complex social issue because they are an 'expert by experience'.

One thing worth checking is whether the outlet prefers short pitches or full pieces, as each publication will have its own preference. You can normally find this information on their website, or by giving them a quick call – don't be shy!



Icon: freepik

Top tip: who should tell your story?

For both feature and opinion pieces, remember that your CEO, frontline staff and service users with lived experience will all have different perspectives to offer on a topic and that variety could be just what the journalist is looking for. Thinking about who else could offer comment, your Lloyds Bank Foundation Manager, or someone from our policy team if appropriate, especially as we can offer a different perspective from the sector.

Top tip: one might be a fluke, two might be a coincidence, three's a trend

Could you partner with other small and local charities in pitching a feature? Whether it's other specialist services working with the same group as you (such as domestic violence charities in your region or up and down the country) or other small and local charities in your local area all experiencing the same thing (such as increased demand for services due to a local change, e.g. policy or weather), a group of organisations fighting the same challenges is more attention-grabbing to a journalist than a single charity and it proves there's a story worth examining.

Commenting on a national story

Think about stories in the press, on TV and on the radio – do they offer a new opportunity for you to reach your goals by accessing a new audience? Small and local charity leaders are almost always experts in their fields, so don't be afraid to speak up!

One way you could do this is to be aware of when general affairs cause interest in your topic. E.g. when The Archers had a storyline about domestic abuse, there was a spike in national coverage for domestic abuse charities. If you notice a 'hook' to your issue, contact your local radio stations and media outlets, ensuring they know you're ready to offer expert comments.

When a Guardian investigation found that more than 3,500 reports of forced marriage were made to police over a three-year period, Jasvinder Sanghera, the Director of Karma Nirvana, a small and local Leeds-based charity (and Lloyds Bank Foundation charity partner) was quoted in the article, which you can read [here](#).

Once you get that attention, you could find it leads to a surge in donations and/or volunteers!

Top tip: building local relationships

We know how important it is for small and local charities to have close relationships with other local charities, local commissioners, the police and NHS, and many other services. But do you have a relationship with your local press? Invite local journalists to visit your charity and build a relationship so they know you are a good source of information. By telling them in advance who you are, where you are from and what you are an expert on, they are more likely to turn to you when they need a comment, or take notice of the press releases you send them.

Top tip: don't fall into a trap

There is a lot to gain from speaking to the press and media, but there are two common traps you'll need to be wary of. Firstly, never overpromise – it's easy to say whatever you think the journalist wants to hear in order to secure the coverage, but avoid claiming you can provide something you won't be able to deliver. Secondly, remember that everything you say when talking to the media might end up in print – nothing is 'off the record', so be guarded and ensure you only say things you're happy for them to quote you on.

Case studies

Case studies bring human interest to your cause and help bring what you do to life. But there are a few things to bear in mind before offering a case study:



Get permission to share service users' stories. Best practice is to work together to write their story and then, when they're happy with the document, ask them to sign a form giving you permission to share it (along with any accompanying photos.)



Once a story is public, it can take on a life of its own – other publications could share it and it could spread beyond the original audience – so make sure you're ok with that from a safeguarding perspective. To be on the safe side, consider anonymising people's stories and/or changing identifying details.



Can you offer your client support during and after they share their story? This could include being present during the interview if a journalist wants to chat to them; sitting down to practice what they'll say beforehand; making sure they receive a copy of the coverage if they want to see it; and ensuring they can contact you if they are worried about anything.

Who can help you?

Could you make use of any partnerships to give you extra capacity to pitch to press, or even introduce you to local or national journalists? If you've done research with a university, linked up with a national charity or campaigned together with other local charities, think about how you can use their contacts.

Succeeding with social

It's time to get online! 90% of people have internet access in the UK and almost everyone is on at least one social network. No matter who you define your target audience as, they are almost certainly on social media – which means you should be too.

What should we post?

Not every message has to be appropriate for everyone, but you should make sure there is something for everyone every once in a while. You could include calls for support, thank yous, photos from events you have held or your general activities, information about upcoming events (for service users and/or the wider community)...

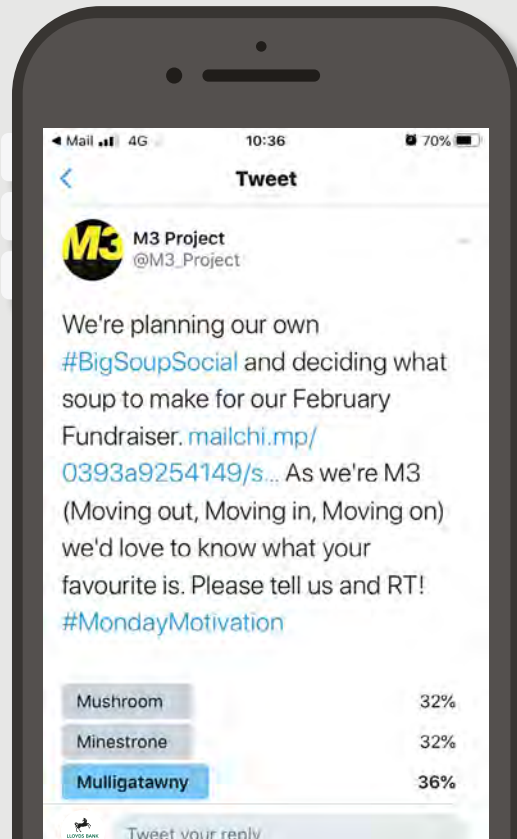
Channel	Who will I find on there?	What could I use it for?	Can I schedule posts in advance?	How do I set it up?
Facebook	Pretty much everyone!	Posts for your service users, donors and friends amongst the local community – on upcoming events, donations you need and so on. You can also use the Facebook Fundraising Tool to gain donations directly through the site.	Yes, directly in Facebook – read how here .	Read NCVO's guide here .
Twitter	Journalists, MPs, campaigners and activists as well as the general public.	Raising awareness of the issues you care about. Following journalists that cover your field – keep an eye out for when they post a #journorequest. Raising your profile amongst the local community. Joining online conversations using hashtags – see how they work here .	Yes, using Hootsuite . A basic account is free.	Follow Twitter's own guidance here .
Instagram	Instagram is popular with younger people so this could be a good choice if you work with young parents, care leavers or other young adults.	Instagram is an image-sharing platform so you could share photos of past events and adverts of upcoming ones. Do you have a social enterprise? You could also post items for sale or services you are offering. Here are some more tips, from JustGiving, on how charities can use Instagram well.	No, but you can post from Instagram to Facebook (though not vice versa) by ticking a box when you post on Instagram.	Follow these instructions direct from Instagram.
Ebay, Etsy, Souncloud	No two small charities are alike and there may be a social network that's especially suited to your work. For example, if your service users sell things they've produced, Etsy or eBay might be good choices for you; if you offer music or film workshops, you could consider YouTube or Soundcloud. If you have the time, a staff member with capacity or a willing volunteer, these could be great options but if you are just starting out, we do recommend sticking with Facebook and/or Twitter to build your online presence first. Social media needs to be monitored and posted on fairly regularly to be effective so don't overcommit – it's better to devote your time to doing one or two things really well than spreading yourself too thinly and doing three or four things but not doing them justice.			

Case study: social media from our charity partners...

M3 Project

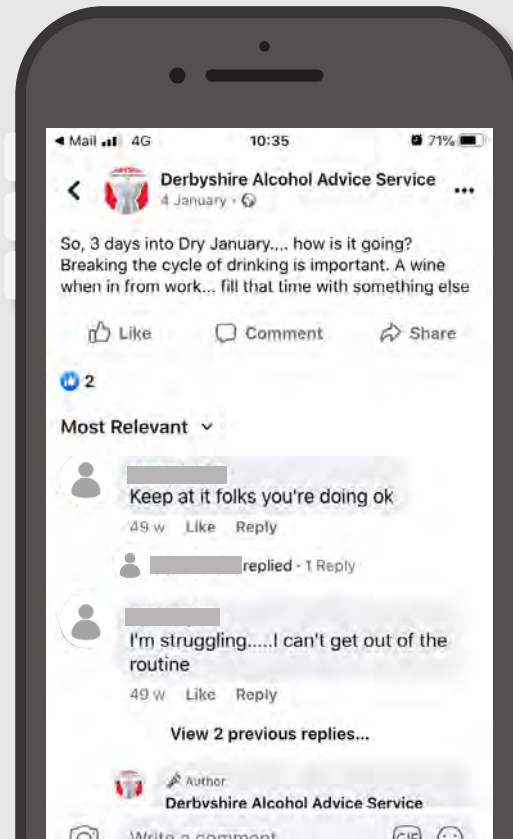
M3 Project recently shared a poll on Twitter to raise awareness of an upcoming fundraiser, getting their 500 followers invested in the event by voting on what soup to make!

They also post 'teasers' of stories in their e-newsletter, to encourage more people to read it, and retweet relevant news stories from local news outlets.



Derbyshire Alcohol Advice Service

Derbyshire Alcohol Advice posted a question on Facebook and service users who follow their Page commented, starting a conversation that was effectively an online version of a support group – people shared their challenges and others offered advice, from the comfort of their own laptop or phone.



Don't be fooled into thinking it's worth paying to reach an extra 500 people a month if none or very few of those 500 people are amongst the audiences you want to be communicating with.

What should we post?

Once you get to grips with social media, you may want to look into budgeting for some sponsored posts. This is when you pay for your posts to reach a wider audience online. You can target your sponsored posts to be shown to a target audience according to their age, gender, interests and location; but remember, it's only worth paying for adverts if they will definitely help you reach your target audience. Don't be fooled into thinking it's worth paying to reach an extra 500 people a month if none or very few of those 500 people are amongst the audiences you want to be communicating with. Find out more [Facebook](#) and [Twitter](#).

What if we go viral?

Going viral can happen fast, and if you're not ready for it it can take over! So if you're planning a big push on social media, make sure to alert your trustees to any risks of increased social media use (and don't plan activity for a time when staff are too busy to respond if it goes well).

Top tip: Facebook - page or group?

Page typically represents the charity as a whole and great for sharing updates with your audience whilst a group is more of a community space where your audience can engage in conversations with you and their peers.

Have a think about what type of communications you want to use Facebook for, and pick the most appropriate one. If you're not sure, why not have a look at some Pages run by other charities?

See what kind of thing they post and decide whether you want to run your page like that, or whether you'd rather run it as a community space where everyone (including you and your team) can start their own topics of conversation and communicate with each other.

Top tip: get social!

Follow/add as friends the people most appropriate to your charity, be it local politicians, funders, other local charity representatives, news organisations or anyone else. And, of course, don't forget to follow us too! We are @lbfew on [Twitter](#) and Lloyds Bank Foundation for England and Wales on [Facebook](#).



News to your Networks

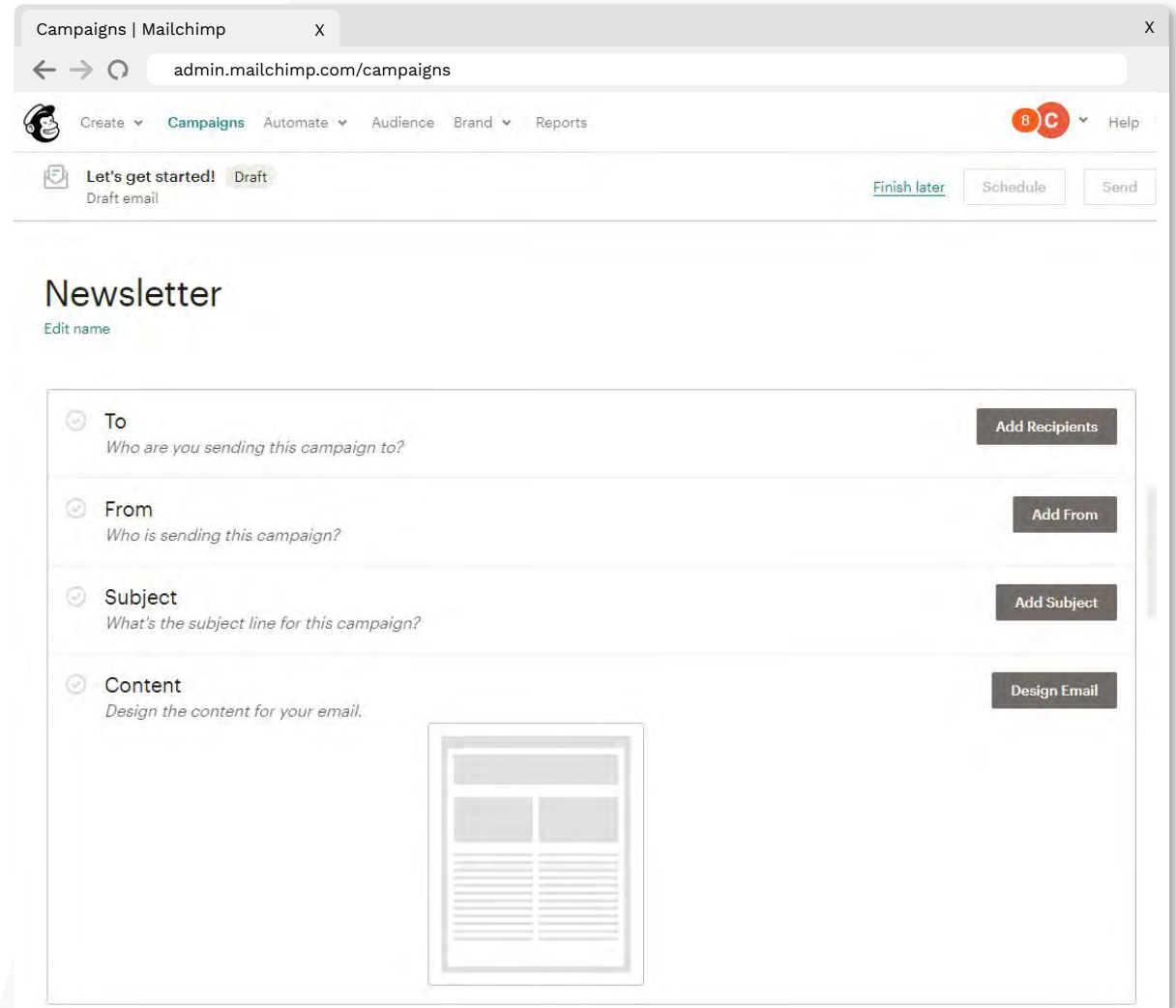
Should you send regular updates to all your stakeholders? Of course! Donors want to see where their money is going; service users want to know what's available to them; partners, funders and supporters want to hear about the impact you're having and how you're making a difference.

But if your newsletter is printed and posted out manually, you're running a costly operation. A printed newsletter doesn't just take time to create, you also need to factor in the time to stuff, stamp and address envelopes, and the cost of the paper, envelope and the postage.

Consider switching to a digital newsletter like Mailchimp, which is cheaper, quicker, and will help you ensure you're GDPR compliant. You can design your newsletter using a template, then upload your mailing list and send it with the click of a button.

What can we do with an online newsletter like Mailchimp?

- Bring your newsletter to life by adding photos and videos with a drag and drop tool
- By adding links to news articles, blogs and other relevant pieces of information, you can pack a lot of content into a single place
- You can segment your mailing list - for example, you may wish to send one version of your newsletter to service users, and a different version to donors
- It shows you the statistics of how many people are opening your newsletters, so you can work out your engagement rate
- It also shows what links your readers click on, so you can see what they are most interested in



Case study: The Wish Centre and M3 Project

The Wish Centre and M3 Project

The Wish Centre (Blackburn & Darwen District Without Abuse) hadn't used newsletters before they received Enhance support from us, which showed them how much they could benefit from one. Now they send updates once or twice a month and according to Shigufta Khan, the Chief Executive of The Wish Centre, they are "very effective and a very good way to connect with stakeholders and partners."

Jayne Turner, Charity Officer at M3 Project, agrees: "it's much easier to engage with community and business supporters and beneficiaries." The staff at M3 Project have found Mailchimp "an efficient and cost effective way to communicate with our supporters", especially when they face "enormous time pressure" and have to wear many different "hats" throughout the day.

The Wish Centre and M3 Project both received support with their communications from our [development programme](#), alongside their grant. If you're one of our current charity partners and could benefit from similar support, don't hesitate to speak to your Foundation Manager.

Top tip: don't forget GDPR!

With the introduction of GDPR back in May 2018, it's more important than ever to make sure you have permission to send emails to your contacts. We have [Enhance support](#) available for this. This [list of resources](#) by the Small Charities Coalition is a useful starting place if you need a GDPR refresher.

You could also consider working out a deal with other local charities to cross-promote each other, especially if you already have a working partnership. This can be of interest to your readers and also help you reach new audiences.

What should we include?

You should include everything from recent activities, new funding/contracts/partnerships, staff or volunteer changes – or you may even want to wish a fond farewell or welcome someone. If you receive donations of items, such as food, clothing, toiletries and so on, you could give an update on what you have plenty of and what you would be grateful for more of. Going digital means you can be creative, so think outside the box. Why not ask a service user or staff member to do a short video introducing themselves or 'a day in the life of..' to increase understanding of your work? Content will be more engaging if you think about interesting section titles, use positive images, and make sure your content is concise.

Top tip: A/B Testing

Are you already a Mailchimp pro? Once you've got to grips with the basics, take your newsletters to the next level. Find out which subject lines encourage more readers to open the email, or which content gets more clicks, using A/B Testing. [Learn about it here.](#)



Valuing video

Videos are a great way to bring your charity to life. They offer the opportunity to go beyond words on a page and really offer your target audience the opportunity to see and hear your message in a different format.

Here are our top tips for producing videos:

You don't need fancy equipment – as long as you have a phone with a video camera, you can make a film! If you want to edit your films, Macs come with free iMovie software, whilst Windows has Windows Movie Maker.

Always make the 'ask' clear – going back to the 'action - output - outcome' model, what do you want people to do after watching your video? Go to your website, make a donation, register to an event...?

Start with a bang – you are competing with lots of other content for your audience's attention and if the opening doesn't catch their attention, it doesn't matter how great the rest of the video is – they may never watch it.

Keep it under two minutes – similarly to the above point, people have extremely low attention spans. If your video goes on for too long, they will simply get bored and scroll past it.

Play with the film options on your phone. On an iPhone you can record in slow motion and time lapse. Could you film a time lapse of your team setting up an event to get your attendees excited? Or a time lapse of a service user's creative project (with their permission of course!)



Valuing video

Keep it clear – avoid a shaky picture, which can make it difficult to focus, by resting your phone or camera on a flat surface. For around £30, you can invest in a small tripod with a smartphone mount.

Don't stand too close – a good rule of thumb is to stand at least three steps away from the person you are filming. Make sure you are far away enough to fit their whole head and shoulders in (as a minimum) – don't cut off the top of people's heads if you can avoid it

A quiet environment is important if you're filming people talking. Be conscious of background electric and street noise. A quiet background hum of a few laptops in the room can be amplified to an unbearable screech on film. Consider an external microphone, though these are slightly pricier than tripods.

Use full sentences – if you are interviewing a service user, perhaps for a testimonial/case study video [like these](#), you may decide you want to edit it so it's just them speaking (see point 3) – so make sure your interviewee answers questions in full sentences. For example:

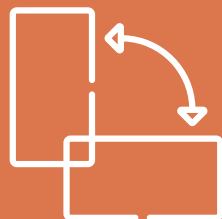
Question: 'How did you hear about our charity?'

Short answer: 'My social worker told me.'

Better answer: 'I heard about [name of charity] through my social worker, who knew they could help me...'

Top tip: film in landscape mode

It may seem counter-intuitive but the best way to film is usually in landscape mode (phone sideways i.e. the long side at the top and bottom, and short sides on the left and right.) This will ensure your video is presented clearly when you upload it.



Top tip: think local

If your finances can't stretch to a professional filmmaking company, but you're looking for something fancier than you're able to produce yourself, why not approach a local college that offers media/filmmaking? There may be a student looking to add to their portfolio or coursework who can help for a lower cost – they might even have access to equipment through their course.

You could also consider Media Trust, who produce top quality films for charities at cost or with a much smaller profit margin than many production companies.



Your website is your shop window

Your website is the first way many people encounter your charity.

This isn't true for everyone; for example, if you do street-based outreach, your service users will probably meet you there rather than online. But MPs and other local figures, funders and potential funders, your local council, the press and plenty of other groups will be looking you up online - so it's important they get the right impression.

Top tip: keep it simple!

A website doesn't need to be fancy, it just needs to serve a purpose - at the end of the day, it's a source of information. We recommend that you aim to have a website that tells the world who you are, what you do, why that work is important and how to get in touch with you.

Top tip: the financial benefits of being online

Do you need to convince your Trustees of the benefit of investing in digital (or need a bit of convincing yourself)? Lloyds Bank carries out an annual study on charities' and enterprises' digital skills; in 2019 they found that 40% of charities can't take donations online. This means 40% of charities are missing out on the opportunity for people to donate from the comfort of their own home or on the go - in fact, any time they aren't on the phone or face-to-face with one of your staff or volunteers. Imagine if a member of the local community has seen a post of yours on social media and is moved to help, so they go onto your website, only to find they can't donate. Don't miss their money! You can add a donate button to your website (again it's best to speak to your website provider for guidance) and you can also register to receive donations through Facebook; find out how [here](#).



Make sure your website contains the following information:

Who you are

This might include your history, mission, values and beliefs. If it's safe and appropriate you could include a 'Who we are' or 'Meet the team' page too. This will bring your charity to life and help first-time visitors put faces to names.

What you do and why it's important

Think about [who your website is aimed at and its purpose](#). Is your goal to help people access services, to get donations or something else?

There are lots of ways to show what your charity's main activities are: you could have pictures, a video, testimonials... Case studies or success stories of how your charity has changed people's lives will help to display the range and value of your work - you could even include a link to download your latest Impact Report.

Make sure visitors also understand why you do what you do. You could preface your photos/videos with a short paragraph, such as: 'Every night, 3000 people sleep on the streets in our town. We provide emergency accommodation for those in urgent need, and skills development and training to help break cycles of homelessness.'

Getting in touch

Your contact information should always be prominent, including a phone number and email address, and if appropriate, a street address with opening hours too. Your contact information could also link to your social media profile(s). Consider putting this information in your website's header and/or footer so it's visible on every page.

Case study: RAMFEL

Refugee and Migrant Forum Of Essex & London runs a busy client facing service. With limited digital skills within their small team the charity requested enhance support to develop their website and social media content. They wanted to make better use of the website in their campaigning activities and eventually want to open up access to their services through an online booking system. The consultant offered advice on design and good practice. The new website now clearly signposts visitors to their services, further information and how to support their work.



What not to include

Time-sensitive information

If you rarely have time to update your website you'll need to be realistic about the type of content you choose. For example, a calendar of upcoming events is only useful if you have time to update it regularly. Instead why not embed your social media accounts so those posts show up on your website? The way to do this will vary based on how your website was built, so it's best to ask your provider for help.

Personal details

If you work with people facing complex social issues, avoid publicising their names or faces and/or those of your team. If you need some photos to bring your website to life, there are some fantastic free stock photo websites in our [Useful Resources](#). You could also think about how to tell a story without 'face photos' e.g. pictures of hands, living spaces, personal objects, or landscapes.

Keep GDPR in mind: if you do use photos of service users, you'll need permission to take and store them. The easiest way to get consent is to ask the subjects of the photos to sign a form; [download a template form here](#).

Top tip: DIY it when you're on a budget

On a tight budget? You can keep costs down by building a simple website yourself without having to write a single line of code! Use WordPress' famous [5 minute installation](#) and download any of the [free charity WordPress themes](#) to get you started. All you need to pay for is your domain name and website hosting.

Be mindful that tackling a project like this isn't for the faint of hearted. If this is your first time setting up a WordPress site you'll need to invest time into learning how it all works and keeping it up to date.

Top tip: See what works with analytics

Make sure to use free website tracking software like [Google Analytics](#) to see how your audience use your website. Are you getting visitors to your site generally and are your comms efforts working at driving your audience to your site? Are they visiting the pages you want them to? Do they take the time to read your news and updates? Ask your web developer to set this up so you have these insights at your fingertips



Part three

Communications in action



Attendees at Lloyds Bank Foundation's Westminster Summit 2019

Engaging Events

From sponsored activities, fundraisers or anniversary parties, it can be powerful to have all the people important to your charity in one room. Here is our ten-step guide to making sure everything goes according to plan:

Check the purpose - Is an event the best way to communicate your message? Like anything else in this guide, an event is a type of communication, so you should set goals as we said at the beginning of this guide. Start by identifying your event objective(s) and your key audience(s).

It's all in the planning - Make sure you have a good plan in place for your event – both in the leadup and on the day itself. For example, a weekly planner (such as a [Gantt chart](#)) or simple timeline will help you track your progress and identify who's responsible for what. Unlike other projects, once the date for an event is set, there's (usually) no moving that deadline!

Choose the right venue - Make sure the venue suits the event. You might be able to host it at the place you usually run your services from, or you might need to hire a space. If you can, go and visit a few options – it's often different in real life from how it looks in pictures – and meet the team that work there, they can make a real difference on the day (see point 8!) Don't forget to keep accessibility in mind: does the venue have wheelchair access and a hearing aid loop? What about gender-neutral toilets? Can doors be opened with one hand, and are there designated disabled parking bays?

Cater carefully - Catering can have a huge impact on an attendee's experience. Think about what you're going to offer guests and check their dietary requirements in advance or cater for a wide range of needs. You could consider selling food rather than providing it to keep your costs down – this may not be appropriate for all events, but it could work well for a fundraising fun day, for example. You might also be able to partner with a local cookery club, college or business to provide lower cost food and drinks.



Attendees at Lloyds Bank Foundation's Westminster Summit 2019

Engaging Events

You can't be overprepared! - Watch out for the curveball... Inevitably with events, there will be things you didn't anticipate. Try to reduce the risk of surprises by taking the time to think of some contingency plans. For example, what happens if your speaker gets stuck in traffic? For outdoor events, what's your Plan B if it rains? What if a member of your team can't make it on the day? Stay calm, there is always a solution!

Communications and marketing - If you don't tell your target audience about the event, you could end up with an empty room! Leave enough time to invite guests and promote the event, and focus all your communications on what's in it for them. Even if your overall objective is fundraising, you still need to give people a reason to be there. You can also promote your event on [social media](#) and in the [press](#).

VIPs - Consider whether it's appropriate to invite your local press, Councillors, MPs, other local charities or businesses. Whether you have genuine VIPs or not, all your guests should be made to feel like VIPs on the day! Make sure your staff and volunteers are clearly visible on the day, such as with a name tag or t-shirt, so your guests know who they can ask questions.

Money, money, money... - Find budgets scary? They don't need to be, and your budget is crucial to success. Take time to establish your costs, including venue hire, catering, staging and any guest appearances, not forgetting their travel if you're covering that. If you're selling tickets, think about what your audience will be willing to pay and how you can maximise your income. Would a local business sponsor part of your event? Could you sell enough tickets at the right price to recover a chunk of your costs? What could you get for free or as gifts in kind? Above all, know your limitations; make sure you're realistic about what you can afford and consider your staff's time as well.

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Engaging Events

Learn from each event - After your event, take some time to think about what went well and what didn't go to plan, and what you would do differently next time. This will really help in improving your future events. Also, don't forget to thank those who helped: staff, venues, suppliers, they all contributed, and you want to maintain those great relationships.

Follow up with attendees too – try sending a feedback form by email. You might be surprised what matters to them, and their comments will help you plan future events. It's also an opportunity to thank them for coming and share any photos from the big day.

Tell the world! - The impact of your event can extend far beyond your guests on the day. Use our [press tips](#) to get some coverage for your event in the local press and it will ensure that anyone who couldn't make it this time will mark the date for next time in their diary! Even if your event is invite-only, getting positive press coverage is never a bad thing and ensuring your events are featured will keep you in the public eye. You never know who's reading...

Top tip: think like an attendee

From planning to post-production and everything in between, put your attendee hat on. What do you need to know before you arrive? Tell your guests! What are you expecting at the event and what would make you think the event was great? Try to anticipate what your guests might think or want and do your best to provide it if you can.

Top tip: risk assessment

You should carry out a risk assessment before any event. Read the Lloyds Bank Foundation [Risk Management Toolkit](#) to help you with managing risk for your charity overall, which you could work through with a specific event in mind; you could also search for guidance online, or speak to your Trustees.

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Andrew Charles speaks at our Value of Small Wales event in 2018

Influencing policy

If your goal is to influence policy, the first question is whether it is a national or local government issue, as this will determine who the best person is to target. You can find out who your local councillors, MP, AM or MEPs are by putting your postcode into [WriteToThem](#), a website which makes it easy for you to contact your local representatives.

Be proactive in sending evidence or case studies that MPs or councillors can use to raise the issue. You might consider inviting them to attend or speak at an event or to visit your charity. This can be a nice photo opportunity for them, but it's also a good way to raise awareness of your cause. Use the opportunity to tell them about the problem, but also give them a clear 'ask' – what do you want them to do as a result of this?

Be open-minded about the political party your representatives are from – don't make too many assumptions about what they might or might not support.



You can find out who your local councillors, MP, AM or MEPs are by putting your postcode into [WriteToThem](#).

MPs, councillors and AMs hold regular surgeries to hear from local people about problems and issues in the community. Could someone affected by your issue (or a supporter) raise it at a surgery?

Consider the operational side as well as political representatives – while councillors or MPs have power over direction and leadership, council officers or civil servants have more specific expertise and may stay in position for a longer time. For example, a councillor may have the power to ensure priority and funding is given to a particular issue, but a council officer will be responsible for the practical details of how that money is spent – so it might be helpful to engage on both sides if possible.

If you have data, reports or evidence to make the case for a particular policy, consider sending it to the council officer or civil servant responsible for that decision. Try to find out about the strategy, priorities or objectives that they're working towards – can you demonstrate how your 'ask' helps them to achieve this? Offer your expertise to help them make an informed decision.



Tips for influencing local government:

Do some background research– are your councillors on any committees? Find out if there is councillor with responsibility for the issue you're working on (e.g. Cabinet Member for Children's Services or Transport) – could you ask your local councillor to raise it with them?

Be aware of local elections, which usually take place in May – it may be more difficult to engage a councillor during this time as they'll be busy campaigning. Bear in mind that there's a risk that they may not get re-elected, or that the political make-up of the council might change direction

Influencing other services or professionals:

If you're looking to influence other services or professionals, to improve provision for your service users. Think through the same steps as above – who has the power to influence this and what do you want them to do? What's the most effective way to reach them? Emphasise your shared interest – rather than focus on what other agencies might be doing wrong, position yourself as a helpful partner, sharing your expertise to improve outcomes for service users.

You might consider running workshops or training for professionals in other organisations, or providing toolkits or information packs to raise awareness. Rather than creating your own new resources, think about existing channels that would allow you to reach your audience. For example, could you talk to the local university about how a topic is covered in their training for social workers? Are there existing online resources that you could add to rather than creating your own?

Tips for influencing your MP:

If you're contacting your MP, it's important to make it clear that you're local to their constituency, as this gives them a duty to respond.

Do some background research before you contact them – what are their interests or priorities? Are they on any committees? Have they campaigned or spoken about your issue before?

[TheyWorkForYou](#) is an easy tool for finding out about your MP, with accessible information on how they've voted on different issues. It also allows you to search for quotes from particular MPs or about the issue you're interested in. You can also create email alerts for when a specific MP speaks, a particular topic is mentioned, or for information on upcoming debates.

Be clear about what you're asking them to do - whether it's raising your concerns with someone else (e.g. Secretary of State or Minister responsible for the issue), voting against a particular piece of legislation or committing to support a particular policy.

Partnerships
Be clear about what you want
Training



Getting wider support for your cause

Gaining a broader base of support may help you achieve your goal. Think about how you can engage supporters in a useful way – are there particular skills or expertise that you're looking for? Would it help if supporters wrote to their MPs? If it's a local issue, local newspapers or radio can be an effective way to raise awareness and support in your community – see the [Press](#) section for more.

But it's worth considering whether or not you actually need public support. Will having broader backing increase your influence with decision makers, or is there a risk it could backfire? Consider the [tips](#) about dealing with the media. Some issues are more difficult to generate public support for. While petitions are a popular way of demonstrating wider public support for an issue, they can backfire if you're only able to generate a handful of signatures.

Think about who else you might get on board and how this would help. It's worth checking whether any other organisations are already trying to achieve the same goal as you – could you work together rather than starting something new? Or is this an issue that your organisation has a unique perspective on? Are there other organisations with similar aims, other groups of people who are affected by this issue that might add their support?

Review and adapt

Influencing is not an exact science. As you try out new ways to reach your goal, take time to reflect on what goes well and what doesn't. How can you learn from this and adapt your approach to improve your chances of success?



An attendee at our 2018 Value of Small North Event

An attendee at our 2017 Westminster Summit

Useful resources

General

[Knowledge Hub](#) – Charity Comms resource of expert-written blogs and articles going into depth on many of the topics covered in this guide

[Media Trust](#) – run training for charities across a wide range of communications needs and offer a volunteer matching programme to help with content creation

Social media

[Hootsuite](#) – schedule your posts in advance

[Lloyds Banking Group Business and Charity Digital Index](#) – need to convince your trustees to invest in Digital? These statistics evidence how digital capabilities can make practical differences to your charity

Images

[Canva](#) – graphic design website where you can use templates to make infographics, posters and more

[Unsplash](#) / [Pexels](#) – two libraries of stock photos you can use to bring your communications to life when you can't use photos of your own service users

Videos

[Animaker](#) / [Powtoon](#) – two easy online tools to help you make animated videos and cartoons

[YouTube](#) / [Vimeo](#) – two websites that will 'host' your videos, which you can then share on your website and/or social media

Influencing

[Knowhow Nonprofit](#) – Campaigning and Influencing – an introductory guide to campaigning and influencing, with sections on developing, planning and running a campaign.

[Sheila McKechnie Foundation Social Power resources](#) – The Sheila McKechnie Foundation provide training and resources to support campaigners. Their Social Change Grid is a useful framework for thinking through your goals in terms of four spheres of influence – service provision, community, public sphere, institutional power. The 12 Habits of Successful Change-Makers is also a useful prompt to consider your approach to influencing.

[WriteToThem](#) – an easy way to find and contact your local MP, councillors or MEPs.

[TheyWorkForYou](#) – a tool for finding out about your MP, with accessible information on how they've voted on different issues. It also allows you to search the whole of Hansard, so you can find quotes from particular MPs or about different issues. You can also create email alerts for when a specific MP speaks or when a topic is mentioned, or to hear about upcoming debates.

[Charity Commission Campaigning and political activity guidance for charities](#) – Guidance for charities on what to consider when campaigning or engaging in political activity.

[Lloyds Bank Foundation research](#) – our research is designed to build an evidence base to champion small and medium-sized charities, which you can use to support your influencing.

Events

[Eventbrite](#) – sell tickets to your events (or register attendees for free events). You can customise the form to gather other information too, such as dietary and access requirements

Newsletter

[Mailchimp](#) – build your e-newsletter using intuitive templates. You can upload your own photos

Press

[Gorkana](#) – a database of many journalists' areas of interest and contact details

[Journalisted](#) – similar to Gorkana, you can also search for articles by journalist, news outlet, subject and/or key word

[Constructive Voices](#) – a service run by NCVO to help charities get more media coverage

[Pressat](#) – free press release distribution service for charities

[IMiX](#) – an organisation that supports refugee charities with press releases and media

[Neon's Press Officer's Handbook](#) – covers key skills such as writing killer press releases, using the phone, preparing spokespeople for broadcast and much much more.

Website

[Wix](#) – offers templates that allow you to drag and drop content to build a website

[Squarespace](#) – another web design and hosting service to help you get started

A final top tip!

If you're a Lloyds Bank Foundation charity partner, you can also speak to your Foundation Manager about how our **development offers** could help you build your communications capacity.

**LLOYDS BANK
FOUNDATION**
England & Wales



Lloyds Bank Foundation for England & Wales partners with small and local charities who help people overcome complex social issues. Through long-term funding, developmental support and influencing policy and practice, the Foundation helps charities make life-changing impact. The Foundation is an independent charitable trust funded by the profits of Lloyds Banking Group as part of their commitment to Helping Britain Prosper.

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Contact Us:

Pentagon House
52-54 Southwark Street
London SE1 1UN

enquiries@lloydsbankfoundation.org.uk

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