THE COMMISSION ON THE DONOR EXPERIENCE

# The richest medium: how conversations can build relationships

## Project 11f. Face to face

Sam Butler, February 2017

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| **For senior management and trustee boards, this project will:** |
| - Show why the recruitment process for face to face (F2F) fundraisers should be invested in and the benefits of having a highly motivated and committed team. |
| - Encourage them to see F2F fundraisers as an essential part of the team and provide opportunities to involve them within the wider charity. |
| - Explain the benefits of investing in retention strategies and not accepting the 'norm' of 50%+ year one attrition. |
| - Introduce them to a range of inspiration involvement devices that can be copied/built on to enhance the sign-up experience. |
| - Give the charity's leadership the confidence to defend F2F fundraising against negative publicity and promote the on-going benefits it can deliver to an organisation. |
| - Make them accountable for the behaviour and conduct of F2F fundraisers and ensure there are clear safeguarding and whistle-blowing policies in place. Additionally, they should take an interest in mystery shopping results and compliance against F2F regulations. |

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| **For donors, this project will:** |
| - Reassure donors that, if they do stop to speak to a F2F fundraiser, the experience will be respectful and positive (even if they say 'no'). |
| - Make F2F fundraising exciting and something not be avoided. This will be done by creating great involvement devices and sign-up experiences. |
| - Show, once they've signed up, that they are appreciated and valued through inspiring communications that reflect the reason they signed up in the first place. |

## Summary Guidance

The following paper looks at the way the experience for face to face fundraisers, both within agencies or in-house operations, has a direct impact on the way a supporter then experiences their journey with you as a charity. We will explore many aspects of a face to face fundraiser's journey in to the charity sector. From their first interaction with a job advertisement, through to the point at which that they become a bonafide advocate for the charitable sector, moving on to a profession within a charity or agency with a true understanding of how by putting the experience of a supporter at the forefront of their profession, they can help the charity sector to deliver more for their beneficiaries.

At a time where public trust in charities needs to be reinvigorated, and the pride of all those that deliver vital services (whilst the austerity measures that have been taken mean that they are now needed more than ever before) it is time we restored a sense of magic to the achievements that this wonderful method of donor recruitment can achieve. By changing the methods, we have seen become tried and tired since face to face took to the streets and doors over 20 years ago, we can help to engage new audiences in the causes that it represents, and realise the true value that supporting a charity in the modern age has for each individual donor, and society.

### 1. Getting the best face for your fundraising.

a. How and who are we recruiting to be the most publicly accessible face of fundraising? How are we motivating applicants to apply?

   Pushing the passion for your cause over the salary and bonuses that they will get paid is going to encourage applicants that identify with your work. Improved recruitment should lead to happier donors, as many of the negative connotations that the public have towards face to face fundraising are reduced by an improved experience. Reducing the 'sale' and emphasising the 'experience' through inspiration should remove the stigma that is attached to it as a sales culture.

b. Face to face continues to be seen as a temporary role, filled mainly by students or those looking for a stop-gap. This does not lend itself to recruiting a dedicated and passionate individual looking for a career in fundraising, (although those are the ones we look to promote and celebrate). Are we only stumbling across them, rather than appealing to many future fundraising professionals out there? By celebrating the best of those that we recruit, and by changing the way we advertise to fill the roles, we can help to bring the best people in to the third sector, and develop them for future opportunities within the charity sector.

c. Connecting applicants with your charitable projects and developing their knowledge of the work they are generating funds for, is a wonderful way of donors then receiving first-hand knowledge of how their donation will be used. Allowing agency or in-house staff access to this will help to improve the donor's experience with the face to face fundraiser they speak with. In 2013, St John Ambulance used beneficiaries of their RISE project as face to face fundraiser's. This meant that supporters spoke with a beneficiary, allowing the face to face fundraiser to also be a living breathing case study.

d. Improve the information that they have on what your charity does. Performing the art of inspiring someone to commit to a long-term relationship with your charity is about having a genuine interest in the cause that you are working on behalf of, and being given the right tools to do it. It is not about selling a "lift pitch" up to 30 times a day, so this means they need to be equipped with a great deal of insight in to what the charity that they are representing has achieved in the past, how it was achieved, what the charity wants to see happen moving forward, and how they intend to realise it. They can't be expected to improve the donor's experience, or ignite a sudden desire and willingness to support a charity by just reading from a script, that comes across as yet another robotic person trying to flog an idea to you. Being a passionate ambassador, and coming across as someone who is genuinely trying to change the world will have a far more beneficial impact for everyone concerned!

e. The skills and training they receive initially will stand a face to face fundraiser in good stead, but there needs to be ongoing development, regular training updates to continually inspire them. This paper aims to show you that it is in fact the ongoing support and expertise that they gain that will be integral to retaining staff and to the survival of face to face as a fundraising method.

f. Making staff feel valued will undoubtedly have a positive impact on the public, and especially the supporters that they recruit feeling valued too. Yet despite a concerted effort to move away from days of oversaturated streets, doorsteps and private sites, the existing face to face model still seems to be rooted within a stack them high and bleed them dry mentality for all involved. The fundraiser's themselves, the supporters and members of the public that complain all leading to the constant narrative within the media that face to face fundraising is nothing but a menace. How can this narrative be changed? Help is undoubtedly needed from experts across the sector, and this paper aims to identify where that is happening, and how it being achieved. But, the role of the face to face fundraiser in changing their own story within the public and media domains can't be underestimated.

## 2. Ongoing development of staff.

a. Provide staff with the right training to enhance the experience that they can give your supporters. Move away from a short-term target driven culture, and work on improving staff retention within a face to face program. This can allow you to reduce your recruitment costs and help develop a secure and longer-term culture within the team. The financial model that exists, seeing up to 50% attrition being budgeted and forecast in-year, is in-itself almost an admission that the model is accepted in its current broken form.

   Setting the standard for fixing this is complex. As Amnesty International in Belgium found when they developed a donor insight program (see page 23 for a case study on their work with Donor Voice) . From the point of welcoming the supporter to the organisation, they have a system that is providing the in-house and agency management with insight on how they can develop staff, improve their retention, and continue their supporter journey with the right messaging. Improving their retention of staff and of their supporters. Charities blaming agencies for not hitting Key Performance Indicators (KPI's) on age and average donations is usually a common practice used to explain why retention is so bad. Oxfam UK have done work to debunk this theory, showing that the individual that a supporter has spoken to, has far more to do with the retention, than the age or amount a supporter is willing to donate.

b. Record insights on your supporter's experience through the welcome process, use this to help develop your face to face teams, sharing best practice to improve 12-month retention. Agencies have now taken the Amnesty International Belgium model and have developed the technology to help assist you with your supporter experience.

c. Engaging teams with the wider organisation, the history you have, successes in lobbying, and campaigns that have raised awareness. The more they understand your work, the more they can inspire and educate new supporters. There are examples of this being done within the paper. And the theme of face to face being utilised as more than just an acquisition channel, and more of a communication and brand channel can be seen to give demonstrable benefits for the work that face to face fundraising carries out for your organisation, especially when aligned with the wider directorates that communicate to the public, be them brand, communications, marketing or fundraising teams.

d. Create those you want to keep with a clear career pathway. Fundraiser's do not grow on trees, and they need a sense of the profession of fundraising being somewhere that they can develop and progress professionally. Many of today's fundraisers, and employees within charities, started their journey as street or door face to face fundraiser's. HR departments within charities are employing recruitment teams internally, as the money they must pay recruitment agencies continues to grow. Skill-sets of the face to face teams will vary widely. Many a face to face fundraiser has started off in the profession using it as a stop-gap, or a job-to-do whilst finding employment in their chosen profession. Making sure that they are aware of the opportunities within the charity they work for if your team is in-house, or the one that they are representing through the agency they are employed by, will only help to improve the sector. Internships can be used to incentivise staff, and again bring them closer to the cause that they represent. Something St John Ambulance has done with their long-standing agency Wesser.

## 3. Involvement devices and tools for fundraisers to use.

See also CDE project 12 – *Inspirational creativity*

a. How can the PR, marketing and communications teams place positive stories in communities where your fundraisers are working?

b. Digital tools can help immerse the public in your charitable work and improve retention. In the main report, you will be able to see the evidence of how Amnesty International, UNICEF, Médecins Sans Frontières, Save the Children, and Greenpeace have all been using virtual reality to help leverage a greater donor experience for all those that stop for their teams. Virtual reality is not the only tool out there. There are also other great examples of involvement devices and props that have helped to engage supporters with the charities story, and place the public in the shoes of the beneficiaries whose need the fundraiser is attempting to meet.

c. Get your senior management team working with your F2F teams, and see the culture within your organisation change. There are examples from Oxfam, Care International and St John Ambulance that prove where the charities staff give their time to the face to face teams, the benefits of this interaction are passed to the donor, and their experience in interacting with the teams is improved. Face to face fundraising has been receiving a media bashing on an annual basis since 2002. And despite the hundreds of millions of pounds that it has raised over the years, it is only very rarely that a CEO, or Director of Fundraising comes out to defend it.

## 4. Where your face to face fundraisers fundraise.

a. Think about the site, street or towns that the teams are working in, and how to attract the public towards the cause. This is a shift away from the traditional model. Work with your fundraising teams on informing them of relevant news stories and avoid saturating areas. Inform the public through local press releases, your website and across social media that you are going to be in the area. By far the most frequent concern the public have had in terms of a face to face campaign run by St John Ambulance is to check that the people on the door step are genuine.

b. Does your charity, or the campaign that they are working on allow your teams access to areas that are not commonly associated with face to face teams. By exploring all the touchpoints that your charity has with the public, you will be able to open new opportunities, bringing teams ‘face to face’ with those that have a common interest with the cause through the location or event where they are able to fundraise. In a crowded market place, restricted by regulation and local council authorities, access to new locations is an important consideration when planning for your face to face program.

c. Regulation on private sites, the street and doors is currently being updated by the Fundraising Regulator through their ownership of the code of practice. Make sure that you use this as an opportunity rather than seeing it as a reason to stop! Face to face provides you with opportunities to get your brand, messages and an ask to specific audiences, as Save the Children, St John Ambulance, Greenpeace and others are doing.

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## 5. Engaging face to face fundraisers with teams within your charity.

a. Break down internal silos. Share what's new with your face to face teams on a weekly basis. Keeping the face to face teams updated with relevant news and stories of the charities work that has gained media interest will help them have a point of reference to begin a conversation with a potential supporter. Making sure that they have been briefed will mean that through a communication process, the public are receiving the correct information, which in turn will help to develop and gain trust in your brand, the individual fundraiser and at best, result in a new committed supporter.

b. PR, marketing, brand and communication teams can amplify the voice your charity has if you are all saying the same thing. You can read in the main report how St John Ambulance has doubled their net income through face to face since 2013 by aligning campaigns with the message on the doorstep. There is also information on how UNICEF's unified approach to their 'safe and warm' appeal helped to lift income across all fundraising channels. Perhaps most importantly for this paper, it resulted in the public approaching their face to face teams to make-a-donation.

**c.** If a fundraiser sees your work, they have first-hand knowledge to give supporters. Breaking down barriers internally, and changing staff's opinion of face to face allows people to meet people, ease concerns, and drive a more supporting culture within your charity.

**d.** See face to face fundraiser's as a human communication channel. Not just a human vessel for performing financial transactions! If they meet your beneficiaries, they have their stories to pass on to supporters. If they know about your campaigns, they can promote them and amplify the impact that they have.

## **6.** Giving face to face fundraising positive PR.

a. Through moving to digital, see how social media can bring your supporters together. The Oxfam App is an innovation that promises many learnings for the entire sector. Similarly, WaterAid and Care International have utilised Facebook to build a stewardship model that allows supporters access when they want it.

b. Training teams in first aid. St John Ambulance and the British Red Cross have both had media stories picked up demonstrating that by aligning their cause with their face to face teams, that face to face gains some positive media attention. What if all face to face teams were seen by the public as being potential life savers in their neighbourhood, in the local shopping centre or on their high street. By changing the narrative, and image, would the marmite factor (people wither love it or hate it) decease? Like all new ideas in fundraising, it must be one that is at least worth trialling to see the results that it generates, doesn't it?

c. Offering more than just a direct debit, and never saying 'no' to an offer of support. As face to face becomes more widespread across the world, customer relationship management systems are being used in Australia and in the US that means that every conversation that a member of the public has with your face to face teams can lead to a relationship of value. It might not generate the traditional direct debit, but it is providing a donor a way in to your organisation that suits and works for them.

d. Signposting potential supporters to the rest of what you do. Help people understand your cause. Make people ambassadors for your cause.

## 7. Safeguarding your face to face fundraisers and the donor.

a. How you can make mystery shopping your teams about more than just a deterrent? By developing a process that improves the supporters experience, brings the wider employees and staff in to the world of the fundraising team, you can help support the communication of your face to face program on a local level.

b. Having been accused of targeting the vulnerable in a national newspaper in 2015, St John Ambulance now has a digital audit trail for all staff that fundraise for them face to face. A recruitment process that involves tests on the vulnerable, ongoing training modules, and helps to identify those that can be tracked in to senior positions, they turned a negative experience in to a positive development with their agency partners.

c. Moving away from seeing success just based on sign-up rate. By bringing other measurements in to play, and using the face to face contact to promote campaign and lobbying messages, the retention of supporters can improve, along with the engagement that the public has with the wider marketing work of the charity or NGO. Using media centres on PDA's, stands in private sites and a digital welcome process, donors can experience more of what the charity has to offer through a digital journey.

d. Promoting the best to leadership roles based on retention. This hasn't always been possible, as the short-term nature of employment within face to face has not allowed it. But as retention of staff improves, and the culture of an agency or in-house team becomes about rewarding those that recruit's donors that stay with the charity, rather than the number of supporters a face to face fundraiser can achieve per hour (sign-up rate), fundraiser's can be held up as a great example for their retention.

## 8. Welcoming the donor, and the follow-up communication.

See also CDE project 4 – *Thank you and welcome*

a. By asking new supporters for a little more information, and saying thank you well, the alignment of a good telephone program with a face to face program can prove valuable to the donor and the charity. Helping to place the relationship on a firm foundation, and making sure that the ongoing supporter journey is one that the supporter wants.

b. As referred to earlier, the Donor Voice model initiated at Amnesty International Belgium is about gathering information on the fundraiser and the supporter, and investing in insight to improve retention.

c. In moving the "total marketing" culture, to create a "total fundraising" one, charities are improving how their message resonates with the public and individual donors. This was demonstrated brilliantly by Louise Lane from UNICEF and Sinéad Chapman from fundraising agency Open at the 2016 Institute of Fundraising Conference, held at the Barbican.

d. Don't bombard your supporters with requests to donate, or communications. Listen to what they have to say about you as a charity, and ask them how, when and what they wish to hear about. By treating them in the way that they wish to be, you can see an instant uplift in their support for you, be that through the lifetime value, the retained support, or the opportunities that they can give you access to through their contacts.

## 9. How to ensure good practices are upheld.

a. Use your data to engage your supporters, and gain insight as to what they want from you in the future.

b. Have contracts and agreements with third parties that hold you both to developing a relationship that will benefit you both in the long-term. The Fundraising Regulator continues to roll out changes in the way that you must work together. By taking stock, and working with your partners to amend contracts to fall in-line with the regulations, identify the area's where new processes can to enhance the donor's experience. Take a practical approach to implementing them, so that the benefits can be mutual for you and the agency, and result in providing the donor with an experience of supporting you that lifts face to face fundraising's reputation, and that of the sector.

c. The auditing of your agency should be become a regular habit. St John Ambulance started doing this in 2009 on an annual basis. This has now evolved in to a regular monthly process, and the benefits that it has had to the partnership between the face to face agency and the charity.

d. Training days and the induction of staff is one area that improves the experience that your face to face fundraiser's pass on to your supporters. But regular seminars allow you as the client to get to know your agencies staff. The problems that they must overcome daily when faced with their interaction with the public. By listening to what the public are saying to your fundraisers, and acting as a conduit of information to other departments within your charity, you can identify solutions to help raise the experience that supporters and non-supporting members of the public have with your brand. Improving its reputation within the marketplace.

e. Be prepared to learn from other agencies and charities. In January 2012, a small working group was set up for face to face agencies, in-house teams, and charities. The regular meetings and networking opportunities that this has provided to all of those that attend is discussed below. But remember that one model of face to face does not fit us all. The group has benefited by the sharing of best practice, the solutions that each have implemented and the findings of those outcomes has allowed everyone to benefit. But by making your face to face model an extension of your charities personality, it dilutes the sense that face to face is just the same in a different jacket. Props, give-aways, media content, the place or event where the face to face fundraising is taking place, all have an impact on the donor's experience. By taking a creative approach, the variety of engagement is changing face to face fundraising for the better. Within this paper there is further insight, case studies, processes and techniques that will help you to improve your model of face to face, and the experience that everyone has when engaging with your teams.

# Part 2: Why the 'golden goose of fundraising', F2F, is in such trouble now

The charity sector has been walloped over the head for the past year-and-a-half, through an unparalleled level of scrutiny on the practices that we undertake to engage supporters. Although the media have got some of their facts surrounding the events of 2015-2016 wrong, they have got some correct and have shaken the sector to its core. Many colleagues have spent the last year in turmoil, fearing the next exposé article. Agencies have closed down at an unprecedented level and the underlying anxiety experienced amongst many friends and colleagues still hangs in the air. What can we do? What is best practice? How can we continue to do our jobs? Are all questions that have been asked in recent times.

Face to face fundraising has however been subjected to this level of scrutiny frequently since the early 2000s. Media attacks on agencies appeared to become a yearly happening, with TV and press looking at this very public facing method of raising funds on a regular basis. The term "chugger" (charity mugger) was coined a long time ago to deter the public from engaging with face to face fundraising. It has had an impact. In 2008, increasing demand for face to face led to it being described as "recession proof"; see articles here: https://fundraising.co.uk/2015/10/21/face-to-face-fundraising-is-recession-proof-technique-ifc-delegates-told/ and **www.institute-of-fundraising**.org.uk/library/**introduction-to-f2f/**
However, in recent times face to face looks less appealing to fundraising leadership.

Some large agencies have disappeared altogether (eg Gift Fundraising Ltd in 2011, NEET Feet in 2015, Dialogue Direct in 2007, Tag Campaigns in 2013, Fruitfull in 2004, Future Fundraising in 2015, Fundraising Initiatives in 2015), and many charities with big campaigns on the street and doorstep have pulled them or reduced investment following the negative media attention.

## The approach

In this paper, we will look at how the success of face to face fundraising from 2000 led to increasing demand. When times were good, a level of complacency led to poor practice and the donor experience being ignored or sidelined. This in turn has had a very negative impact on the culture that developed around face to face. This has led to one of the greatest innovations in fundraising becoming a 'damaged vehicle', in need of serious repairs when it comes to driving committed donors to regularly support a cause.

The approach has been to look at the journey an individual face-to-face (F2F) fundraiser is taken on, from his or her first day in the job, along with the support that is agreed between the agency and the charity contractually to support the new recruit in his or her job. This included liaising with in-house management teams and agencies to look at their relationships with their clients and the journeys a new employee would go through. It is by no means a comprehensive representation of every organisation currently using face to face, but has involved collaborating with those that have come forward to engage with the Commission, or those that have shown a willingness to meet and discuss the paper.

## Agreeing the principles of your relationship

Implementing a practical strategic process can be a daunting task. But by working with your agency, or by taking an integrated approach to establishing a face to face program within your existing fundraising strategy, you will find the pros of having a public facing acquisition program, far outweigh the cons, if you get this right. In fact, if you really get it right, then the cons are all but eliminated!

The new holder of the Code of Fundraising Practice, the Fundraising Regulator, has taken the steps to review the aspects of the code that are relevant to door to door, street and private site fundraising and merge them with the rules that were initially set out by the Public Fundraising Regulatory Association (PFRA). With the PFRA having merged with the Institute of Fundraising, the Fundraising Regulator is now the sole source of information on what to do and what not to do. Their code should be used as a framework on which to build your face to face program. The regulations are robust. You can review them here: https://www.fundraisingregulator.org.uk/code-of-fundraising-practice/rulebooks-for-face-to-face-fundraising/

The key word here is Respect; "The Street Rulebook outlines the conduct expected of fundraisers engaging with members of the public in local areas. Fundraisers are expected to RESPECT the public and the fundraising environment, by avoiding behaviour which may harm the reputation of the fundraising profession itself.

Fundraisers are expected to RESPECT the public and the fundraising environment, with rules included on:

- Terminating a conversation when a person does not wish to be engaged
- Avoiding deliberate obstruction or pursuing the public excessively
- Maintaining distance from shop entrances, cash points and other street features
- Avoiding members of the public who are seated or 'on duty'
- Use of "team bags"

Fundraisers are also expected to SAFEGUARD the public, with rules included on:

- Identifying and terminating conversations with potentially vulnerable members of the public
- Being clearly identifiable as a charity representative through appearance

INFORMING the public is also a fundraiser's duty, and they need to make explicit to potential donors:

- Who they work for
- How the fundraiser's organisation will be paid
- Length of commitment expected of the potential donor
- Financial nature of the donor "ask"

## The Door Fundraising Rulebook

The Door Fundraising Rulebook includes rules on:

- Approaching households respectfully
- The time of day that fundraisers may knock
- Members' responsibilities regarding local "no cold calling" zones and door stickers."

So, with the rules laid out, the principles can fall in to place.

1. Explore if you want to start a program in-house, or if you want to conduct your model through a third-party provider. In-house set-up costs are expensive, and the volume

you require, if large, is always going to be more easily achieved through an established agency.

2. Appoint an agency that you feel comfortable with. Meet with the preferred clients, vet them, interview them, get them to tender for the work and pitch to partner with you.
3. Agree to internal processes around: how to manage interaction with a potentially vulnerable supporter; whistleblowing policies; and the agencies social media policies. This is a partnership. You will have to work hard to maintain a strong partnership.
4. Get out and meet the teams that are on the street.
5. Once you negotiated the agreements and costs, remember to make sure that you have claw back's in place for those supporters that don't make a first/second/third payment.
6. Set your KPI's. These are traditionally based on the average donation, average age, and a percentage of the supporter's that you want to be able to claim gift aid against.
7. Agree a fulfilment process. Some agencies include this in the cost per fundraiser per day, or the per donor recruited.
8. Arrange for regular meetings and assessments of the campaign. The frequency of these should be in place before you start. You may wish to trial a period of recruitment of a minimal amount of new supporters, pause for a 3-4 month period, before then rolling the full campaign out so that you can gain insight and confidence in the quality.
9. Set a regular training session. Charities that engage in the training process see a higher level of retention, and do this frequently, so that as the staff turnover and leave, you are making the same connection with those that are recruited in to replace them.
10. Make sure that you are happy with the appointed account manager, as this relationship is going to be key in the development of your campaign.
11. Have a robust complaints procedure in place, so that investigations can be handled efficiently, and that members of the public feel heard and effectively responded to when they raise their concerns.
12. Have a complaints process and details of the relationship with your partner on your website, with relevant contact details of how the relationship between you and your agency works, and how complaints can be dealt with.
13. Internally communicate the campaign, so that all staff and volunteers are aware of it, and the benefits that the income will bring to the charity in the long-term.
14. Integrate the stewardship of the new supporters in to your welcome program and your donor journey.
15. Include insight gathering mechanisms in to the data collection at the point of recruitment and the welcome call process (see the Donor Voice model later as an example).
16. All collateral, branded hand-outs, digital stewardship options, tablet content for the fundraisers to use, potential involvement devices (see the Sense example later), should be sourced and ready for the launch date.
17. Data flow between the agency, your fulfillment house, the telephone welcome calling centre, and the charities data team should be agreed to.

18. The shift patterns of the staff each day, and any seasonal implications. For example, some charity clients prefer not to knock doors as late as 9pm in the winter months, as it can reduce the risk of complaints and damage to you brand.
19. Include key stakeholders internally in the decision making. From trustees, through to all public facing departments (digital, PR, brand and communications, public affairs and marketing teams), can all help the campaign to deliver its maximum impact.
20. Instill the values of your charity in to the campaign and training.
21. Mystery shop. Site visit. Engage as much as you can. This will benefit you massively,
22. Get feedback from the fundraiser's themselves. Listen to what their concerns are, take them back to your team to brainstorm, and act accordingly on delivering solutions. Standing on the street, in a private site or knocking doors all day is a lonely occupation. So the more that you can support those fundraising for your cause, the better!
23. And according to the agitator, here are 8 more things that you should know: [http://www.theagitator.net/wp-content/uploads/8thingsyoushouldknowFtF.pdf](http://www.theagitator.net/wp-content/uploads/8thingsyoushouldknowFtF.pdf)

## Recruitment and training

The relationship that you hope to build with your future donors begins with the recruitment of the fundraisers that will join your in-house team or your external specialist agency. If these individuals are not invested in in the correct way, then you can't expect the relationship to be strong from the start. The face to face model that has developed since the 1990s in the UK has generally seen a lack of investment in the individuals that we recruit. This can be seen from starting salaries for street fundraisers (these have actually dropped in some cases since 1999, when a London-based face to face fundraiser could earn £9 per hour as a starting wage, to the current trend of paying just £7-£8 per hour. We also have seen the shift in a full 8-hour day being paid including breaks, to a general acceptance of an 8-9 hour working day, only being rewarded with a 7-hour paid shift). In agencies this lack of investment needs to be re-examined. Is it right that owners and directors look to pull sizeable dividends out of the business each year, when it may be better to invest more back in to the product that they deliver?

Many agencies pride themselves on the strength of their brand, and word of mouth spreads quickly amongst the pool of students and others looking for work over the summer break, when traditionally agencies' capacity it is at its peak. If you can develop a reputation and identity that is supportive of fundraisers' personal development and deliver on what you promise whilst recruiting them, then your retention of staff on a full-time basis can rise, alongside a considerable drop in the cost of recruiting staff. Where this culture is developed well, the need to recruit new starters falls, and so can break the "hire and fire" culture. This is where recruiters are recruited at as a low cost as possible and then those who don't perform as quickly sacked. It can also improve the quality of donor retention too, as fundraisers are better trained and motivated.

Within an agency, it can be a delicate balance between a culture that retains a loyalty to the agency and representing the brand of the charities that are providing you their business. Putting the cause(s) first will be of mutual benefit to your company and its clients. And happy clients will speak the loudest in terms of repeat business.

How can you ensure only those fundraisers with good intentions start working? How can you create a pay structure that rewards those who do a good job, recruit loyal supporters, and don't act as mavericks that can jeopardise the future of the face to face fundraising?

It will pay you to invest both money and time in getting good staff. You want to create the right team culture then to find personalities that fit. Then you need to train them carefully. You need to create a strong career path, and offer supportive training modules. Currently the majority of new starters will last between 3-6 weeks, before deciding the job is not for them. F2F fundraisers often talk about inadequate quality in the team leaders who manage them and point out that pressure to recruit high volumes of new supporters often transfers on to potential supporters.

By offering a more supportive model for both team leaders/managers and a better quality of training, recruiting the right person for the role becomes a more attractive proposition both for the candidate and the cause. Some agencies and charities give their new recruits a very clear understanding of the targets and training that they will receive from the start.

One agency that has worked very closely with their charity partner is Wesser. They have now been fundraising door to door with St John Ambulance for almost 20 years. Together they have developed a special module to safeguard vulnerable individuals when fundraising. They require all candidates to read this before attending their interview. At the end of the module all candidates take an online test, which helps the agency to screen candidates before interviews and make sure that those that get through are already aware of the issues surrounding this activity. It also provides an audit trail to prove that all fundraisers are trained in the topic, and are not recruited for this work if they do not pass. Initial training is then split across two full days, one of which is spent on further safeguarding, whistleblowing policies, social media policies and HR policies. The second day is spent focussing purely on the charity, and workshopping the charity information in to pitches/spiels/presentations. Further training is then given throughout the fundraisers employment. There is a team leader development program in place, to bring through new leaders. These are identified through a period of 4-6 months and fundraiser who have a low level of donor attrition are prioritised.

The Oxfam in-house team, offers split bite size training modules over the first month. Additionally, there is a career pathway for face to face staff, which allows them to spend time working with staff across Oxfam.

By reducing the information overload for all news recruits, and breaking training down into modules, fundraisers are given more insight in to how they fit in to the world of fundraising within the charities teams. They are given context on how the supporters that they recruit will be stewarded and the journey that charities want supporters to embark on through their interaction with them.

St John Ambulance and the British Red Cross have issued press releases over the past few years, promoting the fact that that their face to face teams are trained in first aid, and so are providing the communities in which they work, with more people equipped with the skills to save a life. A Wesser door to door fundraiser for St John Ambulance hit the local headlines in a positive way thanks to some collaborative PR: http://www.edp24.co.uk/news/training-helped-leaflet-deliverer-to-be-a-life-saver-in-norwich-1-4664151

In these cases, this level of personal development has seen the retention of fundraisers increase, and has driven down the need to constantly recruits. On average the cost of recruiting a new start is between £800 to £1,000. Reducing this cost and reinvesting it in training, development or salaries of the fundraisers would be more beneficial.

This type of approach towards the employment, training and development of staff can only be a good thing for the sector. It will help to build a greater sense of why good face to face fundraisers feel proud of what they do, and certainly reduce the risk, and complete lack of support that produces articles like this one: https://www.theguardian.com/society/2002/jun/21/fundraising

## Ongoing development

By investing more in staff over their initial induction period, you can keep more staff, and retain more of the supporters that they go on to recruit. Fundraisers that have strong retention statistics are often overlooked for promotion over those that have a high sign-up rate (number of new supporters per hour). However, long term quality should be the priority for face to face fundraising. By promoting fundraisers with better retention, you change the culture of what is celebrated within your teams, and what others should aspire to. By then giving these individuals development opportunities, such as internships within the wider charity (allowing them to gain a stronger understanding of the charity that they are raising funds for), you increase motivation and job satisfaction, which could translate to better quality face to face fundraising.

Careers in fundraising are not often planned. And face to face has been the breeding ground for many of the fundraisers now directly employed by charities. Developing a career pathway for face to face fundraisers where your charity, or charity partners can offer those that remain loyal future development and possible employment in other areas of the charity or agency is incredibly beneficial. Rory White wrote about this in his article in the Guardian in 2012:

https://www.theguardian.com/voluntary-sector-network/2014/mar/21/chuggers-street-fundraisers-charity-bonafide-employees

Face to face fundraisers should be equipped with simple information on giving and the charity they are representing. Do the fundraisers understand that they are offering supporters an opportunity to help? That they are providing unrestricted funding to the charity? Do they understand the value of that? Do they have view and training of the wider marketing and communications that the charity is promoting? Of how they fit in to the context of the work that the charity is undertaking? How will a supporter help the charity to lobby for change? What is the charity currently campaigning for? What is the PR or brand and communications message that you want at the front of the campaign? How can the face to face fundraisers help to drive the public interest towards a digital campaign? How can they sign post supporters who want to go beyond committing to a regular donation? And how can the supporter be informed through the face to face fundraiser as to how they can engage further? Are you looking for event participants? Is a one-off donation an option for a supporter that might be able to give less frequently? How do you allow for this to be achieved through the face to face fundraiser? And then how do you move relevant supporters in to the correct donor journey?

Having seen training documents at agencies reduced to a single sheet of A4 is further evidence that fundraisers are starved of information about the cause they represent. In 2000, face to face fundraisers working for one charity were handed a 30-40 page document outlining the history of the charity, the achievements that it had made in regards to practical provisions to beneficiaries, the successes or attempts that it had made to lobby the government, and the ongoing plans and achievements that it was reaching for in to the future. Each element of the work in that pack would have been supported with case studies and statistics to back it up. In essence, by fundraising to the fundraisers, you are creating a better training environment, and modelling to them, what you want to then see replicated through your private sites/street/door campaign.

When agencies don’t get the culture right, the staff can end up having a morale sapping experience from the top down. Ken Burnett wrote a wonderful blog that highlighted the crisis of confidence he witnessed here:

http://www.kenburnett.com/Blogfacetoface.html

Avoid such a moment by pulling as much from this paper as you can!

## Engagement and initial supporter experience

Asking properly and then welcoming new supporters are the foundations for a long lasting partnership with each individual that your face to face teams engage with. Your training should support the fundraisers and the subsequent communications that the supporter receives should reduce the likelihood of supporters stopping their gift early on.

Once upon a time a face to face fundraiser would have been visited on site by someone from the charity, in meetings, and in regular catch-ups by a member of the relevant charity's fundraising team. One charity that has consistently provided its agencies with a senior member of staff has been Care International. The CEO Geoffrey Dennis made regular trips to meet team members when they worked with Gift Fundraising, informing the fundraisers of how vital their work was to the organisation. This legacy has now been taken up by Care's current CEO Laurie Lee, who spent some time working with the OneSixty face-to-face team this year. By receiving a very personal welcome to the campaign, the face to face fundraisers felt inspired. This is a very practical and easy way for to making sure that the voice you want the fundraisers to have when engaging with your supporters is consistent.

These examples are an exception to the rule in most cases. Agencies are open to having senior members of staff from the charities they work with attend training sessions, and work alongside their face to face teams, but struggle to get them in. If we want to see engagement increase, it has to be achieved together. We would urge far more regular contact between senior staff and agencies. This should be recorded or a KPI set to measure this and the impact it has.

The next step in the donor experience is how much you ask the supporter to donate. From our research, there appears to be a lack of freedom to choose the amount supporters can donate. Targeting a minimum average donation is in fact turning people away that might have otherwise become someone that would have eventually left you a legacy (though given the average age of donors who sign up for F2F this is more likely for door-to-door fundraising than street) . Yet time after time, when willing to give £4-£7 per month, face to face fundraisers are having to attempt to boost and negotiate the donation upwards, and see potential supporters leave with a "greedy" image of the charity brand. To achieve the negotiation with ease, shopping lists should be set to give numerous examples as to what the average donation you are seeking can achieve. Giving the fundraisers the right tools will enable them to explain what each extra pound per month could achieve, whereas simply stating that it is an £8 per month minimum does not. It sounds rude!

When agreeing targets and KPI's for the campaign, make sure that you are never turning a willing supporter packing and diminishing the experience. Even if someone can't or won't sign up to the amount you are asking for, you can still provide a good experience by giving information on other ways to support. Wider marketing across all campaigns can either help or hinder you here. In 2005 the target ask on an NSPCC campaign through an agency was £8 per month. The campaign was going very well, until a DRTV advert went out asking for just £2 per month. If other channels are undermining asks that you have out on other channels it can be of the detriment to both campaigns. At the Institute of Fundraising Convention in 2016, UNICEF gave a great insight in to how they had managed to collaborate on their Safe and Warm appeal, and build a single concept. This proved to see a considerable uplift in acquisition of new supporters across all their channels. By taking a 'total marketing' approach to their public facing communications and fundraising, they saw members of the public walking up to their teams in private sites asking to be signed up.

Less is more in the long-term. When you start your communications, you do not want to come across as desperate and, for example, ask for an increase in a gift after just two-three months. This is off-putting to the new supporter. Typically most face to face programmes see higher levels of attrition across the first 3 months. So why is this, and what is it about the culture of volume that is leading to it? Establishing the right communication from the off is key to reducing this, but with face to face the work that I cite later that Amnesty International and Donor Voice have been doing, can help you to identify the fundraisers with high 3-month attrition and, most importantly, equip them with the relevant training to reduce it through peer to peer shadowing and working groups?

Seeking the correct consent in your permission statement is obviously very important. Fast Map have recently been touring a conference with the Institute of Fundraising and the Information Commissioners Office where it shows that having the correct wording around your permission statement, and creating a data protection statement that uses simple, unambiguous language, rather than it being steeped in legal phrases, can improve people’s understanding and opt-ins. Where Action Aid have done this, they have seen that it can increase supporter’s opt-in/opt outs favourably towards them. In-house teams are far more likely to be embraced and seen as a part of the charity, but this can be achieved by forming a partnership with a third-party agency too. It just takes work! An increase of 5% of supporters opting in for telephone can increase your reactivation and upgrade files, whereas a similar opt-in for email can reduce the cost of stewardship considerably. But, most importantly, it can make it clear to the supporter what, how and when you will be contacting them, and why. Getting good consent is about having a strong permission statement.

The donor experience can also be enhanced through the location that the fundraising is taking place in and through your PR team promoting your cause in area where you are fundraising.

The Air Ambulance has been able to send teams in to areas where the ambulance has been deployed. This means there is the potential for new supporters to have seen the ambulance in action.

St John Ambulance release PR statements in relevant local papers when their door team is in the area. It has also trialled face to face at events where their volunteers are providing first aid. This means supporters can see the beneficiaries of their gift in action and also learn some first aid along the way. Immersing the public in your work, or in the world of your beneficiary is key.

## Involvement devices and props

In 2004, Gift Fundraising took Personal Digital Assistants to the street for the first time! Gone were the paper mandate forms, (unless the server was down), and the novelty of the personal data system was unleashed upon the face to face world. Today tablets are common place, and the ability to show videos and content to prospective supporters is enhancing the experience and engagement for the donor. Ken Burnett alluded to this in his article of fifty ways that face to face can be improved:

http://www.kenburnett.com/BlogF2Fstuckinthesnow.html

Yet one of the simplest examples of involvement devices working well for face to face, was on the first campaign Sense ran in 2003. Tim Longfoot, now at Open fundraising developed three simple props for fundraisers to use on the street. When supporters stopped, fundraisers were able to explain the difficulty for parents forming a bond with their babies when they are born deaf and blind. As the baby is unable to see or hear a parent approaching to lift them out of the cot for feeding, or to simply have a cuddle, the teams explained how a soft cloth is placed in the babies' hand with some of the fathers' aftershave, or mothers perfume on it. After repeating this action every time before picking the baby up, there finally comes a point at which the cloth is placed in the baby's hand, and the baby opens up their arms welcoming the cuddle. Having this story to tell meant supporters were momentarily in the world of the beneficiary.

UNICEF used a doll that all members of the public that stopped would be asked to hold. The doll weighed the same as an average baby born in the western world. As the fundraiser spoke to the potential supporter about the dangers of malnutrition in the countries where they work, they were asked to hold another doll, weighing far less, representing the weight of a child born in such conditions. The ability to simply compare-and-contrast the unfairness of the situation, through the doll, helped to demonstrate the importance of supporting their beneficiaries.

In 2006, Action Aid ran a street campaign through the agency Gift Fundraising. When training the fundraisers at the agency, the charity brought in sachets of Plumpy'Nut to demonstrate how simple the problem of malnutrition could be solved. The teams were eagerly eating their way through the sachets as the charity presented their training. Sadly, due to reasons of hygiene, Plumpy'Nut never made its way on to the streets for the teams to use with supporters! Although it did make it's way in the national press;

http://www.independent.co.uk/news/world/africa/plumpynut-the-lifesaver-that-costs-well-peanuts-8783650.html

Virtual Reality (VR) goggles now provide an immersive way to bring the supporter closer to your cause. These examples come with the caveat, that, if you haven't already started to develop your VR device, then the novelty of this technology will begin to decline, as it is predicted that more and more of us shall be using them in our homes in the coming years. But the impact that Greenpeace have had through their teams use of them has improved the experience for supporters, and enables the charities face to face fundraisers to transport potential donors to the arctic:

http://www.mettle.com/360vr-journey-to-the-arctic-greenpeace/

UNICEF, Save the Children, and Amnesty International have all entered the world of face to face utilising this powerful tool, demonstrating that VR can improve the experience that a donor has when engaging with their teams. One of the best examples of this was Amnesty International's use of virtual reality headsets, which allowed members of the public to stop on a London street, and then be transported to the war torn streets of Aleppo in Syria. It was recently awarded the Third Sector Digital Innovation Award for 2016. The cost was £31,500, and the headsets have been worn and used by over 100,000 people. The increase in numbers that signed up was 9%. You can read more here: https://www.amnesty.org.uk/press-releases/amnestys-virtual-reality-themed-360syria-project-wins-prestigious-third-sector-award

Investment can be hard to achieve, so the props don't always need to be costly, as highlighted by those that Sense used, and by those by the charity Mines Advisory Group (MAG). Louise Wells explains here how they used stickers that looked like real mines in the street, in the hope that passers-by would step on them and get them stuck to their shoes, thus creating a prop to help stop. However, it didn't quite go to plan:

*"The stickers mentioned were first used during MAG's pitch at the Financial Times – we had a day to lobby staff in an attempt to win the staff vote and become charity of the year. Sadly we weren't successful but the stickers were a talking point. The idea was to scatter them, face down/sticky side up, in all areas where we permitted. Staff would come along, stand on a sticker and go to remove it and then see that this could have been a landmine.*

*"We're not a well know brand so we wanted something to disrupt staff and encourage them to ask what was going on but it took people a while to realise what we were there to do – especially as people were arriving for work at 8am. Although the stickers stopped people we had scattered so many that we were bordering on annoyance. We also struggled with our message – it was "vote for MAG!" - ignoring the impact their vote would have in freeing people from the fear and danger of landmines and unexploded bombs.*

*"Shortly afterwards we launched a small street fundraising campaign. We dutifully briefed the fundraisers, kitted them out in uniform and sent them out onto the streets. The agency (the now closed P2P) reported back that sign up rates were much lower than average and that this may be because too few people had heard of MAG or knew the landmine issue was still present. We discussed ways to overcome this and this is where the stickers were revived. The team tested using the stickers on the street and found more people stopped but still struggled with sign up rate. Although a good talking point they struggled with moving the conversation on from annoyance.*

*"They were also practical issues with using something on the floor – it could be seen as littering so only 1 or 2 put down at a time, no good in wet weather and not possible in sites with the biggest footfall and crowded pavements. They began using them more as a prop, rather than on the pavement.*

*"Although we didn't use the stickers in our f2f campaign with a new agency last year, we tried to develop a similar tactic that created intrigue and encouraged people to stop but use it with a tighter, clearer message. We tried a few things which evolved during the campaign period, our fundraisers ended up wearing long red socks and using photo books (we have strong images) to demonstrate the problem. They also had postcards featuring a selection of images used in the photobook so the supporter could choose the one they wanted as a take away, complete with a handwritten thank you from the fundraiser on the back. We also improved our follow up communications, making sure that the supporter received consistent*

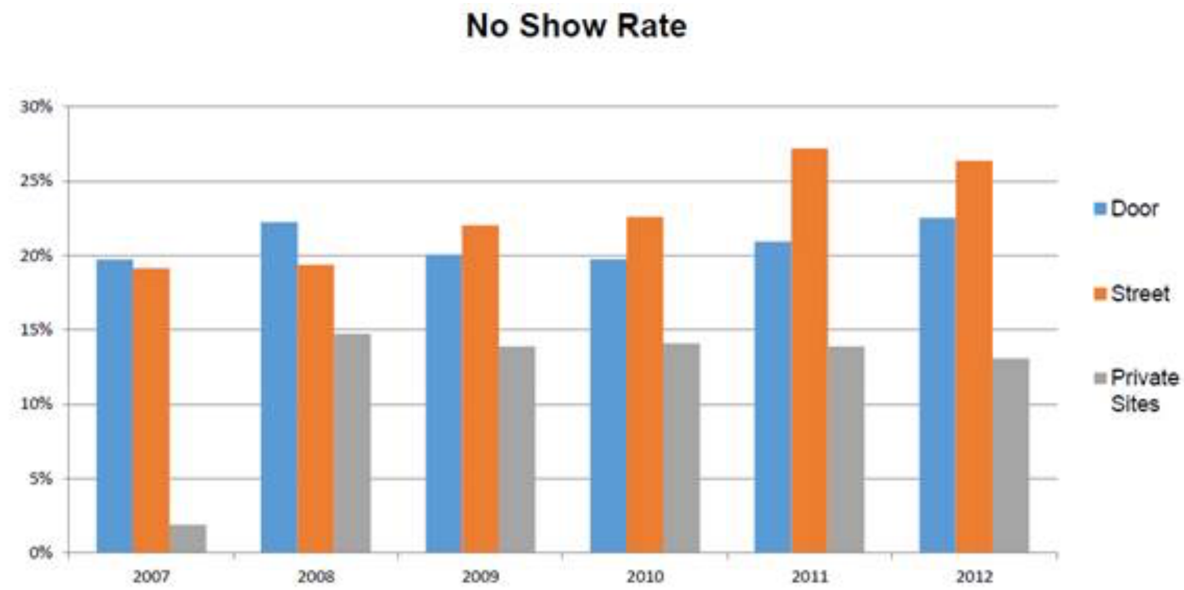
*messaging and a proper thank you. Our agency also lent us a couple of the street team to come to our office and make some thank you calls before Christmas. This meant some supporters were contacted by the fundraiser who signed them up on the street some month before.*

*"We haven't managed to crack this yet but will continue in our next campaign."*

## Location

Face to face fundraising has traditionally taken place on high streets that have been licenced for that purpose or on people's doorstep. Over the last 5 years, there has been a move to private sites. Shopping centres, railway stations, Ikea stores, WH Smiths, and supermarkets are providing face to face with another platform. The danger here is that the annoyance of face to face is just moving location.

DAR's ran a report in 2013 claiming that the no Show Rates of the private site recruited donors was a cut above the street and doors:




In terms of location, it is far more important to ensure that you are aligning your brand and charity with a location that can enhance the donor experience. In 2017, St John Ambulance plan to hold face to face fundraising at the events where their volunteers provide the first aid cover. Highlighting the value of their charitable output to the potential donor, who can see their volunteers working as they speak with the fundraiser. The RNLI have taken their face to face fundraising to the beaches during the summer months, Greenpeace, Oxfam, WaterAid, Friends of the Earth have all fundraised at festivals, such as Glastonbury. Home Fundraising delivered a private site campaign for Orbis at Stanstead and Gatwick airports, aligning nicely with the work of their flying doctors.

Agencies and fundraising teams need to work collaboratively on sourcing these private site venues. There will be opportunities to take your face to face program to a location that hasn't yet been used. It might fit with your brand due to the event it is hosting or the demographic that is attending. The St John Ambulance program mentioned earlier was developed after evidence gained through trials at Twickenham during the six nations, Wimbledon during Wimbledon tennis, and Custom House station during the registration week for all marathon runners, showed that the sign-up rate increased and the retention after 12 months improved by 5% in year one.

## Integration

By working with the wider teams within a communications department or across the wider organisation, fundraisers that find themselves managing face to face agencies can build a mass of extra collateral and insight to equip their agencies staff. The benefits this can have for a face to face agencies campaign can be explored and other opportunities opened. Does your Corporate Team have a partner that could give access to a private site for example? Or do you have a gala event where you may have access to potential new regular supporters? Home fundraising have been successfully engaging attendees at a Save the Children event at Royal Albert Hall in recent years. The charities WarChild, Greenpeace, Oxfam, and WaterAid all have face to face teams working at festivals through the summer months, again taking face to face out of the context that many are used to seeing it during the year.

If the site or environment isn't suited to lending weight to your charity or cause, then you can always attempt to create a more attractive engagement. The World Vision story shop that currently can be found at Westfield's shopping centres in London. This offers an interactive experience, as well as drawing potential supporters in to the stand through its aesthetic appeal. This completely flips the typical challenge face to face fundraisers face, as supporters cross the road, or pretend to be on their mobile phones to avoid being stopped.

As Ken Burnett pointed out in the blog reference earlier, when meeting agency staff on a retreat;

*"I'm talking about professional face-to-face fundraisers. They're the people who talk to our potential new donors, one by one, on the street. They're the people who other professional fundraisers commission to engage, entice and persuade new donors to sign direct debits using this recently established though thoroughly tested mass communication method that many fundraising managers disdain, looking down their noses at it as if it smells.*

*"As I heard the group's stories of client abuses and lack of support and these realisations dawned, suddenly I felt ashamed of myself and my profession."*

If we don't integrate and 'partner' with those fundraising on our behalf, then what do we expect to be the outcome of a campaign that we paying for? When hiring an agency to work with you, you "have" to work with them. Lobbying your senior managers to spend time with face to face agencies is key. Senior managers have been heard referring to face to face as chugging, implying that it is a necessary evil to generate income, but not spending the time and personal investment they might afford other agencies that they employ. By encouraging senior figures to engage, and pushing back against any slurs, we need to be asking SMT members to start stepping in to the shoes of a face to face fundraiser for just one day. This can change your attitude, and those that your peers might have. I strongly suggest that if anyone within the charity is not supportive of face to face, that you challenge their point-of-view, and get them to do it for a day. Engaging fully with the work that the face to face fundraisers are carrying out for you.

When UNICEF integrated their communications, they had people approaching their face to face teams, hear Louis Lane and Sinéad Chapman present their case study here:

http://www.fundraisingconvention.uk/session-programme/session-profile/integrate-your-biggest-fundraising-moment-case-study-UNICEF-safe-warm-christmas-campaign

## Public relations

Celebrating face to face publicly and changing the perception of what a face to face fundraiser is should be looked at in earnest. Some members of the public simply find it an annoying interruption in their day-to-day lives. Knocks on the door during an evening meal, a request to stop when rushing to get the children from school all lead to furthering the disgruntled experience of being asked to donate. Through the experience's your supporters have with the teams, through to the experiences that teams themselves have, we need to give a realistic level of insight as to why people will respond negatively in any given moment. Training teams to have a level of emotional intelligence towards how to react in such circumstances will help to reduce potential complaints from being generated. This is key to building a sector wide brand that is trusted, respected, and continues to encourage potential supporters to engage with them.

Oxfam and Amnesty International, among other international non-governmental organisations with a presence in multiple nations, have set-up a global, social media network through Facebook. This allows the fundraisers to share in their colleague's success and feel part of a far broader team. It has also allowed for individual fundraisers to transfer to other countries. This benefits the organisations by retaining staff from a workforce that has always wanted a transient lifestyle. Most recently, many supporters enjoyed watching the cycling team of face to face fundraisers that Oxfam had travelling the UK. This was a great use of social media, as it brought people out to meet them, and engage with the charity, as the team cycled from town to town on their face to face cycling tour. The tour involved a dedicated team from the Oxfam UK in-house team cycling from town to town, arriving to site on their bikes, and building a sense of achievement within the team, and gained a good level of traction on social media. It celebrated the dedication that the team had to the cause really well, creating a bench-mark that the wider Oxfam team could aspire to.

Cases of agencies being scrutinised in the press are common place now and gaining a real sense of risk amongst senior management and trustees. The agency Wesser, working with St John Ambulance were targeted in 2015. The regular auditing of the agency by the charity meant that they were able to provide evidence during an investigation, which was followed up by the former regulatory body, the Fundraising Standards Board. This meant that the agency and charities partnership was able to continue: https://www.civilsociety.co.uk/news/st-john-ambulance-suspends-fundraising-agency-to-investigate-sun-story.html

But there are a far greater number of stories that have not resulted in such a happy ending. You must be aware of the risk of these, and have a planned response to mitigate against the damage to your brand that such sensationalised journalism can have. These have all happened since the summer of 2015, here in the UK and abroad, so for those of you with an international face to face operation, learn from the past, and make sure that you are well prepared for the future:

- https://www.thesun.co.uk/news/1422874/charity-firm-hires-drugged-up-ex-criminals-to-squash-old-and-vulnerable-for-donations/
- http://www.telegraph.co.uk/finance/newsbysector/retailandconsumer/11981871/Chugging-bosss-businesses-go-bust-but-shell-keep-the-Aston-Martin.html
- http://www.news.com.au/finance/work/at-work/the-bullying-and-hazing-inside-australias-most-humiliating-workplace/news-story/012886ca98839ecc6cb8a11eca370e02

Face to face has faced attacks from the media way before the recent bad publicity the Olive Cooke case has generated. Agencies in particular have been on the receiving end of such stories since the noughties, and the sector has not been united in coming out to defend it, often leaving it down to a an agency spokesperson to do so: https://fundraising.co.uk/2005/08/21/face-face-again-media-spotlight/#.WQBTgVKZO-o

With the level of attention that the sector has had in recent years, following the political narrative from the Etherington Review, the Olive Cooke story, to the establishment of a new Regulator, the most public facing model of fundraising that is face to face, must adapt accordingly to help turn the tide of public opinion and the decline in trust:

https://www.theguardian.com/voluntary-sector-network/2017/feb/10/charities-clean-up-fundraising-questionable-practice

The Charity Comms group is helping to change the narrative, but all of those involved in the face to face world need to collaborate to make this happen. This is not a new call to action and has been highlighted before:

https://www.charitychoice.co.uk/the-fundraiser/restoring-the-reputation-of-face-to-face-fundraising/106

Returning to the idea that all face to face fundraisers be seen as life savers, by being trained in first aid, and being equipped with defibrillators, seems a practical and simple way of adding a philanthropic element to their presence one every high street. The value of such an initiative can be highlighted in the article here:

http://www.edp24.co.uk/news/training_helped_leaflet_deliverer_to_be_a_life_saver_in_norwich_1_4664151

The above story is a great example of how PR teams can work with their fundraising teams internally, to help support the teams and agencies bringing vital funds in to their charity. Sending out press releases to local papers, informing them of the presence of door to door or street campaigns that will be in the local area also helps to bolster the trust. When asking10 charities currently using door to door agencies, by far the most common reason for a member of the public getting in touch with their supporter services team, was to verify that the fundraiser at their door was a genuine fundraiser.

For good measure, and due to the first message left in the articles comment sector, this article from 2012 also highlights the benefits that good PR can have for face to face, but more importantly, the good impact that face to face can have on the charity:

http://guest.thirdsector.co.uk/2012/07/12/face-to-face-fundraising-a-case-for-the-defence/

### Auditing and compliance

Auditing the agencies that fundraise on your behalf is crucial to gaining a full understanding of if they comply with your policies, and those of our regulators. Working with the agency is key to this and will provide far greater confidence in the work that they do on your behalf. St John Ambulance audits both their face to face and telephone agency regularly, meaning that the recent updates on the code of practice could be well planned, changes can be communicated across both the agencies management structure, and the charities. This process should not be one that people fear, it is to reassure all that the charity and agencies were compliant with data law, and Fundraising Regulations. Once the new policies are established and understood, it makes working together far easier, and at St John has led to the implementation of a safeguarding processes that supported the agencies recruitment process. A digital training and recruitment portal was designed so that all new candidates applying for the role log-in and take a Safeguarding the Vulnerable module, which ends with a test. Those scoring less than 80% are then unsuccessful in progressing to an interview. This has offered assurance across the Trustee Board at St John Ambulance that the allegations the agency faced in 2015, that they were targeting the vulnerable, were unfounded.

Black listing those that don't do a good job has often been brought up in discussions between agencies, in-house teams, and regulatory bodies. References are not often supportive in terms of a fundraiser's conduct whilst they have been in work at a previous agency and legally this is not able to given by the previous employer when you seek them. There are possible ways in which we can safeguard the face to face industry, and those are illustrated in the 'Putting the principles and actions into practice section' below.

## Putting the principles and actions into practice

In-house and agency teams have been vocal in looking at a face to face fundraiser licence scheme. This would have to be initiated through the regulator, or an official body like the IoF, but would allow all those recruiting for face to face fundraisers to ask to see the individual licence. Points could be added to fundraisers licences, allowing all to have sight of those that break aspects of FR's code of practice. This would allow face to face fundraising to protect the reputation of fundraising and regain public trust in those who do it. The body that picked this up could also act as a contact point for those wishing to report bad practice or flag individuals that attempt to steal money through the pretence of being genuine charity collectors. Reporting this to the police and assisting them in their investigations could be a key part of your policies and processes. The scheme would also pass a level of accountability to the individual face to face fundraiser.

We have to give relevance to the recent charity climate and increase our accountability to show that we have an audit trail on the processes in-house or third party agencies follow. A record of what you have trained individuals in and the manner in which they have been instructed to fundraise is of the upmost importance. Listen telephone fundraising is now filming all their fundraiser training sessions and are a brilliant example of how this can be achieved. Through compiling this document, agencies and in-house teams have worked collaboratively on sharing their best practices and so have strengthened their individual operations by uniting their skill sets. This needs to happen more, as many of the agencies spoken with have found getting their clients to work with them very difficult.

## Welcoming the supporter and further communication.

The way in which you allow supporters to have a choice in how your charity connects with them is key to maintaining their support. FastMap have been doing some valuable research in to permission statements. They've shown that an opt-in process that is legal, but written in plain English and relevant to your cause can increase take up. Maintaining an open dialogue through their chosen method of communication will enable them to be happier as donors, but most importantly feel the benefits of giving to your beneficiaries. Digital marketing on social media, or via email, paper and telephone will all enhance their experience of donating.

According the fast.MAP MarketReach survey in 2015, over 70% of over 55s only agreed to opt-in to receive marketing less than 20% of the time. Additionally, 90% of them stated they feared their details would be passed to a third-party organisation. Getting your permission and Data Protection statements right, and offering donors reassurance, is key to being able to communicate with them once they enter in to your supporter journey. The frequency of this, be it by direct mail, email, or telephone (such as welcome calls, which are a great retention tool: [http://101fundraising.org/2014/04/just-called-say-love/)](http://101fundraising.org/2014/04/just-called-say-love/) is also a key issue. 83% are concerned they will be contacted too frequently. With many of our donors supporting more than one cause, the time to listen and back off from simply throwing uninspiring and irrelevant communications at supporters has come. The idea of continuous donor choice outlined in project 13 can help here. If your communications are relevant and inspiring, then donors should welcome them, especially if they know they can control the frequency and channels they receive them through.

The work that Ilja De Coster at Amnesty International Belgium (Flanders) implemented and the following work that he is now developing with Donor Voice is proving to be a brilliant way of welcoming supporters. It integrates ongoing development of staff, their training, donor feedback and then further informed communications that a supporter receives. This interesting piece of insight work has over 14 months of data as evidence. Amnesty International Belgium's board and general assembly agreed to a heavy fundraising investment program, but with a strong recommendation that face to face fundraising had to perform much better than previously.

The first step was speeding up the data processing of face to face fundraising and collecting more data about the recruitment than usual. The team then set up a feedback asking process questioning all new supporters by email survey within 4 to 6 days after recruitment. This includes an individual supporter care follow-up in case of dissatisfaction expressed by the donor. These survey questions are designed to gain the level of commitment that the supporter feels towards their cause and their satisfaction with the interaction that the face to face fundraiser gave them at the point of signing up. As all this data is collated and the team is able to provide insight in to how each individual donor's experience impacts on the supporter's retention. This helps to influence the stewardship content and methods used to take them on their supporter journey. But of equal importance, is the manner in which it gives insight in to individual face to face fundraiser's performance.

By measuring the length of time each supporter stays with the charity and assessing that against the feedback that they gave on their commitment you can begin to compare fundraisers not just on their sign up rate, but also by the quality and satisfaction of the donors recruited. Amnesty International's fundraising team is still learning how the interaction between data insights and training of recruiters can help to increase their individual performance and overall donor retention, but the potential of this new way of working becomes more and more clear.

Even more, using a predictive analytics algorithms, the team is now able to predict, what individual donor will stay or leave within the next three months. Those predictions gain an extremely high accuracy level of 80%. In the near future the fundraising team will explore more on how to use these insights to even more tailor retention efforts distinctively for those predicted to leave and those predicted to stay.

While this is still a work in progress, with ongoing tests for which it is too early to conclude, Over the last 14 months, Amnesty International Belgium (Flemish) section has achieved an average first 3 months retention rate of 80%. This compares to only 60% before the changes were made.

A full webinar around the commitment modelling work by The DonorVoice and the implementation of it in face to face fundraising can be seen here: http://www.slideshare.net/kschulman14/how-to-reduce-f2f-attrition-in-the-first-90-days

St John Ambulance have developed similar criteria with Wesser for their data gathering. These two-way analytics benefit the agency staff and retention of them (it has increased 50%, from 3-5 weeks to 8-10 weeks) and the retention of supporters and their communication. By asking the supporter the area of the charities work that they are most interested in, the content for the stewardship journey is broken in to 4 segments. These variables are then used to dictate the messages and stories around the work in the newsletters that they supporter receives. The program has not been running as long as the Amnesty International example above, but 6-month retention has improved by 8% across all supporters. Even more impressively, in the segment on lobbying and aligning their campaign work with the financial ask has a 6-month retention high of 85%.

Médecins Sans Frontiers (MSF) have seen their retention increase due to reducing their upgrades from 12-18 months to 24-30 months. Their approach has been to steward supporters recruited through face to face with regular updates, but not to ask for more on a frequent basis.

## Upholding Good Practices

When a donor contacts you to express a wish to cancel their donation, the supporter team that is dealing with their call must also have been trained to be able to try to rescue some form of continued communication, or financial support no matter how small it may be. This increases the sense of value that you have of them, and can be the difference between seeing a high level of attrition, and spending more of the donor's donations to reactivate their support, or increasing their loyalty, and maintaining it. Kyla Shawyer CEO at the Resource Alliance wrote an amazing blog on a need for transformative change within fundraising, and how she was able to give senior management an understanding of the importance of their donor's experience, and gain support to invest and improve in it. The full article can be found on the 101fundraising website, https://101fundraising.org/2016/09/transformative-change-depends-on-a-new-kind-of-leader/

but these paragraphs give great insight in to how a greater understanding can be achieved across all management, and help to break down internal barriers:

“Non-profits that offer the right kind of leadership enable supporters to feel connected to the cause. Poor leadership tends to have the opposite effect. It can manifest in short-term, transactional fundraising vs. longer-term relationship building with a shared value set developed between the charity and the donor.”

“In 2012 Blue Frog suggested that face to face fundraiser’s offer those that come in to contact with a face to face team a rather unique way of telling us what they thought of them. Listening to feedback is the beginning of the conversation. It gives you an opportunity to engage. The proposed model on how to start this conversation is here: http://www.bluefroglondon.com/queerideas/what-do-we-do-about-face-to-face-fundraising-3/

*“When was the last time you asked your donors why they support you or how they feel about being a part of your work? At a previous organisation where I served, we asked donors of all giving levels why they gave and faithfully recorded all their answers. We then brought everyone from the organisation — board and all — into a theatre, turned down the lights and asked them to just listen. It was immensely powerful to hear the words directly from our donors and helped the whole organisation truly connect with and understand their thoughts and feelings, to see donors as the integral part of the organisation that they are. When we were able to think about our cause and our impact from the perspective of the donor, it opened up internal communications, helped to unite our fundraising and programs teams and influenced our ongoing approach to donor communications.”*

Two-way communication. Compromise. More thanks, less repeated asks. Complaints handled quickly and informatively. Checks on the fundraiser's understanding of the product that has been promised to your supporters is reaching them, are all key to helping your beneficiaries, and maintaining the donors experience is a positive one.

When welcoming new donors in, gaining information from them is important. Was what they were told by the face to face fundraiser on message with what the supporter has signed up to? Rating the conduct and experience that the fundraiser has given the new supporter, (when fulfilling welcome calls or sending out advanced notification letters) will engage your supporters in a feedback process. This can provide valuable you with valuable insight, and create a culture where your supporter base feels listened to. Begin a two-way communication with them, helping to embrace them in to your charities ethos and culture from the off. Let them know that the way in which they have been initially engaged with your charity is as important to you as it is to them.

*“Getting an audience is hard. Sustaining an audience is hard. It demands a consistency of thought, of purpose, and of action over a long period of time”. Bruce Springsteen*

When promoting the work that your charity is doing, be it an awareness campaign, a DRTV campaign, or through out-of-home-advertising, such as on billboards, remember that if you simultaneously have face to face fundraisers working on your charities behalf, then they will often be the main point of contact that the public can feedback on how the campaign has resonated with them. If any of it conflicts with the message that you are fundraising around, then it will undermine the impact of all that you are marketing to the public. Charities often have multiple campaigns and appeals that they are trying to promote to capture the minds of the general public. By having a campaign that can overarch the individual income lines, and not undermine an ask for £8 per month target on a face to face campaign, by having a £3 per month ask out on a DRTV campaign simultaneously. The face to face teams will just be met with the response form the public that they will sign up for the lesser ask that they have seen on the TV.

A simple call to welcome them to your charity, clarify the terms in which they want to support you, and how they want to be spoken with in the future will help to establish a long lasting relationship. The way in which you ask, and ask again (reactivate) should be agreed with the supporter, and recorded through their choice in your solicitation statement. Stop the harrying. Continuously asking your existing supporters for more, is driving an unrealistic belief that growth within your supporter base has no limit. Generosity is finite. By listening to your supporters, giving them a solid overall understanding of the areas of your work, and providing them with the right options in terms of their consent to contact them in the future, are key to building a lasting relationship with them.

Giving the fundraiser the chance to visit the projects that they are funding, meeting beneficiaries, and engaging with key members of staff CEO's, Trustees, and SMT members can be a good tactic. Team visits. Seminars. Regular updates to your teams, PR/communications, successes in lobbying, and those that aren't successful, help to steward the fundraiser in the same way that you want them to build a relationship with a new supporter on your behalf. By taking them on an experience that builds their confidence in your charity, you will enable them to do the same with the donors that they recruit for you.

Training on changes brought in by the new Fundraising Regulator and the code of fundraising practice is vital. If F2F fundraisers are not equipped with the right facts, and PR responses to any difficult questions that the media is asking of the sector, or of your charity directly, then they are not able to represent you appropriately, or to provide the right answers.

No matter who the donor comes in to contact with at your charity, from a face to face fundraiser, through to the director of fundraising, the main aim has to be to give each donor a sense that the culture of the organisation is one where he or she is met with the same set of values and an experience that they want to be part of. There is nothing better than an amazing fundraiser that demonstrates a humble attitude to supporters and their colleagues, be they an employee, a volunteer, or a fellow donor.

This will require the sector as a whole to put pressure on those at the top to insure auditing, best practice and engagement is followed through from SMT's down. Fundraising teams have been undervalued for too long. The irony of this is that without them, where are the funds going to arise from in order for the rest of the charity to deliver? What would this mean for the beneficiaries? Collaboration and the removal of silos can improve income and improve the retention of staff and supporters. By adopting a more integrated way of working across all teams, (not just face to face and fundraising, but all the other teams involved in a charities messaging), this can improve. As Ian MacQuillan from the Plymouth University think tank Rogare explained in his article in The Guardian here:

https://www.theguardian.com/voluntary-sector-network/2013/jun/14/face-to-face-fundraising-risk

If we don't listen and adapt the model, then things will not improve. If we do take up a more innovative approach to a longish-standing model of face to face, then surely we shall at least take some learnings as to how the "golden goose" of fundraising can improve, can be utilised in different ways, and give other areas of fundraising a more public presence.

The need for face to face to change and adapt is long standing. In 2004, as the review of the charities act took place, The Guardian ran this article attempting to enlighten some of the talk that "chugging" was about to become extinct!

https://www.theguardian.com/society/2004/may/27/charityreform.charities

Face to face offers you the chance to engage with people. These people will have contacts, preferences in the way that they like to donate, networks that might open up new revenue streams for you, and face to face enables you as a channel to explore. Technology has moved on so much in the last 16 years.

Hypothetically, let's say that for every one donor a face to face fundraiser recruits on to a direct debit for you, they speak to another 10 people that just don't see this as a viable way to support you. But what else are we equipping that face to face fundraiser with, other than the process to set-up a direct debit? A recent article highlighted that a new CRM platform can open up a broader opportunity to collect the information of people that might want to do one of the following: run an event; support you through their workplace; introduce you to a network of high value supporters; or leave you a legacy. All 10 of those conversations could result in far more engagement than just the one direct debit! It could open up the floodgates to more support and income.

Merging a traditional direct debit ask, with a prospecting model of worth. Allowing supporters that state that they like to run challenge events to be approached by the events team, and an individual that runs their own company to be invited to meet with the corporate team. Interestingly enough, the technology is called Floodgate. More on this can be found in the link below, but surely, it is time that we invested in improving the worth of face to face, not only for the charities we work for, but our beneficiaries, who are increasingly in need of our help under the measures of austerity that we face in the UK, and the causes that affect many across the planet. Isn't it?

http://www.floodgateapp.com/donor-capture/

http://vimeo.com/190691385

## Appendices 1 and 2: Case studies and sources

Sam Butler National Fundraising Manager St John Ambulance and Akin Daramola Wesser Ltd: Experience of media adverse article and the following audit actions and policies that we implemented to provide further evidence of safeguarding face to face fundraising.

Paula Radley Greenpeace private sites VR goggles take the supporters on a journey through the depleting icefields in the Arctic, or through the destruction of the natural habitat of the rainforests.

Gill Marshall Amnesty International Face to Face Manager. Shared the VR goggles that the UK F2F teams had used to transport potential donors from the UK street they stopped in, to the tragic landscape of Aleppo.

Andrej Naraicyn Face to Face Manager at Guide Dogs for The Blind. F2F teams take the dogs out on the streets for supporters to interact with.

Matt Atkinson Managing Director OneSixty. Care Int. Director of Fundraising working with their face to face teams.

Dominic Will Managing Director Home Fundraising. Working with Save the Children with face to face teams working to fundraise to those who attend the charities event at the Royal Albert Hall.

Gift Fundraising 2002 Campaign for Sense, using props designed by Blue Frog Agency to interact with the supporters.

Richard Dalgety International Face to Face Manager, Oxfam's use of social media for the supporter to engage with their face to face team that cycled across the UK to recruit new supporters.

Chris Taylor Face to Face Manager at Oxfam, explaining their internal development process for staff, and shift in monitoring their fundraisers through traditional KPI's, and moving to attrition levels to develop a better understanding amongst their workforce.

Justin Wylie Head of Strategy, Performance and Insight, Action Aid and David Cole Managing Director of fast.MAP Seminars held in conjunction with the ICO and the IoF on A Guide to Creating Charity Permission Statements.

Richard McStraw BHF Compliance Manager The need for policies and safeguarding to assist and guide fundraisers, with a strong audit trail to prove evidence of the actions and processes being followed.

Akin Daramola, Wesser Ltd. Campaign Manager Need for charity and agencies to work collaboratively, providing a presence at training days, and regular seminars to help f2f fundraisers have a better understanding of the charity's needs.

Louise Lane Head of Direct Marketing at UNICEF and Sinead Chapman Strategy Director at Open; Integrate your biggest fundraising moment, Case Study: UNICEF 'Safe & Warm' Christmas Campaign at IoF Fundraising Convention 2016.

Rory White Managing Director Flow Caritas; Guardian article on the number of former face to face fundraisers now employed in management within charity fundraising teams.

Ian MacQuillin Director Raogare and Adrian Sargeant Director Centre for Sustainable Philanthropy: IoF Convention Relationship fundraising: where do we go from here.

# Appendix 3: Methodology:

My approach to pulling this paper together was to firstly reach in to the depths of my own experiences over the past 16 years. Having worked as and managed face to face fundraisers for over 10 years at Gift Fundraising I had personal experiences that proved invaluable in pulling this together. Having then moved from the agency to St John Ambulance, and remained in touch with so many of the people I have been fortunate enough to have worked with in both capacities, I was able to reach out and meet with many of them. Meeting Tim Longfoot from Open it was wonderful to have discovered that he had developed the props for my personal favourite of the case studies from Sense. So simple, and yet so obviously effective. Many of the contributors have also been attending a regular meeting of face to face fundraising experts. Where we could share best practices in the hope that we would begin to offer hop, and re-galvanise optimism after a very torrid year across the sector. It has almost become a regular counselling group for us; "I am a face to face fundraiser, and I have been addicted to it for the last 16 years."

Others have been very courteous and generous with giving me their time, and arranged to meet with me off the back of the announcements made at the IoF convention in 2016. What has certainly worked for me, and is obviously fitting for the subject matter, is that everyone I have had contributions or guidance from (thank you Dominic Will), has met with me face to face. There were many notable individuals that I haven't been able to meet with, almost, but not quite on many occasions, but then they have passed their thoughts and advice through colleagues of theirs that I have.

Face-to-face fundraising (F2F) is one person stopping another individual to talk to him or her about something that they both care deeply about, the talker offering the listener something practical and effective that he or she can do about it that will be worthwhile and satisfying for both. This is a very valuable method of fundraising . In essence it is fundraising in its purest form. Historically, this is the way it must have been done since year dot, with one human representing a cause, and inspiring another to fund the need and help. So, safeguarding it, and ensuring that at the very least it survives, but with the hope that it can be reinvigorated and thrive, is not just enjoyable work, it is work that really should be done. Thank you to everyone who continues to do it.