



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 ongoing 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.

For donors, this project will:

- Reassure donors that if they 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 to 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 Principles

The following paper looks at the way the experience for F2F fundraisers, both within agencies or in-house operations, directly impacts the way a supporter then experiences their journey with you as a charity. We will explore many aspects of a F2F fundraiser's journey in 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 they are now needed more than ever before) it is time we restored a sense of magic to the achievements this wonderful method of donor recruitment can achieve. By changing the methods, we have seen tried and tired since F2F took to the streets and doors over 20 years ago, we can help to engage new audiences in the causes 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 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 F2F fundraising are reduced by an improved experience. Reducing the 'sale' and emphasising the 'experience' through inspiration should remove the sales culture stigma attached to it.

- b. F2F 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 for which 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 F2F 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 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, which means they need to be equipped with a great deal of insight in to what the charity 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. 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 F2F fundraiser in good stead, but there needs to be ongoing development and regular training updates to continually inspire them. This paper aims to show you that it is in fact the ongoing support and expertise they gain that will be integral to retaining staff and to the survival of F2F 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 will feel valued too. Yet despite a concerted effort to move away from days of oversaturated streets, doorsteps and private sites, the existing F2F model still seems to be rooted within a 'stack them high and bleed them dry' mentality for all involved. The fundraisers themselves, the supporters and members of the public who complain all leading to the constant narrative within the media that F2F fundraising is nothing but a menace. How can this narrative change? Help is undoubtedly needed from experts across the sector, and this paper aims to identify where that is happening, and how it being achieved. The role of the F2F 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 F2F programme. 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 sees up to 50% attrition being budgeted and forecast each 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 programme (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 provides 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, thereby improving their retention of staff and of their supporters. Charities blaming agencies for not hitting Key Performance Indicators (KPIs) 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 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 within 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. 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 in which 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 will 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.

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 of your charity if you 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 F2F 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 F2F fundraisers 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. Train 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 F2F 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) decrease? Like all new ideas in fundraising, it must be one that is at least worth testing to see the results that it generates, doesn't it?
- c. Offer 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, which means that every conversation that a member of the public has with your F2F 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. Signpost 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 deterrence? By developing a process that improves the supporter's experience, brings the wider employees and staff in to the world of the fundraising team, so 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 who 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. Move away from seeing success just based on sign-up rate. By bringing other measurements in to play, and using the F2F 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 PDAs, 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. Promote 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 as well, the alignment of a good telephone programme with a F2F programme can prove valuable to the donor and the charity. It helps to place the relationship on a firm foundation, and it makes 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 with 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 areas where new processes can enhance the donor's experience. Take a practical approach to implementing them, so the benefits can be mutual for you and the agency, and result in providing the donor with an experience of supporting you that lifts F2F fundraising's reputation, and that of the sector.
- c. The auditing of your agency should become a regular habit. St John Ambulance started doing this in 2009 on an annual basis. This has now evolved into 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 F2F fundraisers pass on to your supporters. Regular seminars allow you as the client to get to know your agencies' staff and the problems 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 by improving its reputation in the marketplace.

- e. Be prepared to learn from other agencies and charities. In January 2012, a small working group was set up for F2F 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. Remember that one model of face to face does not fit us all. The group has benefited by the sharing of best practices, the solutions that each have implemented and the findings of those outcomes has allowed everyone to benefit. By making your F2F model an extension of your charity's personality, it dilutes the sense that face to face is just the same in a different jacket. Props, give-aways, media content and the place or event where the F2F fundraising is taking place, all impact the donor's experience. By taking a creative approach, the variety of engagement is changing F2F fundraising for the better. Within this paper there is further insight, case studies, processes and techniques that will help you to improve your F2F model, and the experience that everyone has when engaging with your teams.