



**10 Questions for
charities to ask
new agencies to
ensure good
governance.**



We have learned so much from our B Corp journey and wanted to share our top 10 (plus a bonus one) of the best questions to ask F2F agencies when undergoing a tender process.



1. Are they members of the Chartered Institute of Fundraising (or the relevant body in your country)

Being a CloF member ensures that the agency is up to date on all compliance matters, they should also be participating in the Street and Private Site mystery shopping program.



2. Ask them what they do that truly makes them ethical.

A random spot check on 5 F2F agencies and they all used the word Ethics or Ethical to describe their practices. Recruiting donors F2F for charities does not make you an ethical business. The practices within the business do. What is the company culture like? Do they give back to the community? How do they pay their employees? What do their policies look like for Maternity pay? Do they have any 3rd party accreditations or awards demonstrating their good business practices?



3. What are the agency's core values and how do they put them into practice at a grass roots level?

What are the values of the agency? Do they align with those of your organisation? Do their employees know what they are? Do they put them into practice? If so, how? Can the agency demonstrate that the values are put into practice throughout the business? Look for signs that they are being adhered to in policies and practices within the organisation, in reviews and across their social media channels.



4. How do they pay their fundraisers?

Do their employees get basic rights like a fair living wage? Maternity Pay, Menstrual or Menopause Leave, Sick Pay & Holiday Pay? Are they paying PAYE and National Insurance? Are they utilising commission only or Zero Hours contracts?



5. What are their review site scores?

This is a free insight into the future partner agency you are going to work with. You do the same when you buy car insurance or book a holiday why not do the same for a fundraising agency? The best sites to look at at Google, Facebook, Glassdoor & Indeed.



6. How are the fundraisers trained?

How long is the training and is it assessed? If so what is the pass rate? Can you easily conduct training observations? As a charity partner you want to have clear insight into how this is done. You should be able to easily schedule a training observation session before you enter into an agreement to work together, agencies may record their training and can share this with you. Ask for statistics on how many people pass the training, how the training is assessed and graded? What methods are employed to ensure someone who hasn't reached an acceptable level of competence in either your campaign or key compliance areas of the job are not put in a live situation with the public.



7. How do people become managers?

We have all seen in the sector the consequence of publicised poor behaviour and the damage it can do. If we look at trends it can quite often be traced directly to regionalised bad practice as a result of team managers being given too little training, too much responsibility and not enough ongoing support. Becoming a Team Leader should not be about completing a couple of weeks work and hitting some targets before being confronted with a 'sink or swim' scenario.



8. How often is each individual or team mystery shopped?

Agencies will be mystery shopped by their charity clients and the CloF but it is important that they also have their own compliance monitoring service. What services do they offer and will they share insight with you as a partner? Do they use an agency or do this in-house? Ask to see some example reports and data from the mystery shoppers/auditors. Do they only offer mystery shopping or a more in depth compliance audit such as the service offered by Green Light Sites.



9. How do they measure up against industry standards for complaints?

Agencies must have a public facing complaints policy if they do not then they are in breach of the Fundraising Regulators code of practice. Ask for their CloF Street & Private Site quarterly Compliance reports and their unique identifier. Ask them for their complaints ratio and compare it to the Fundraising Regulator's complaints report. Check the Fundraising Regulator's list of investigations and see whether your agency is featured and if so, whether the complaint was upheld.



10. What are their attrition rates, how do they combat high attrition?

Non payer, 1st claim attrition, year 1 attrition are the key metrics you should ask every agency to provide. Ideally they will plug this into a forecasting/modelling spreadsheet with their key KPI's and pricing and provide you with some sound year 1 modelling estimations. Also worth asking how the use KPI's to make improvements as the camapigns run to deliver the best ROI possible.



**11. (The bonus one) References.
Who do they
work with now &
can you contact
them?**

The F2F sector is incredibly collaborative and open. There is not a charity out there who would not want to be asked for a reference for an agency they have worked with. Ask your agency for at least 2 references from current or former clients.