Chartered Institute of Fundraising

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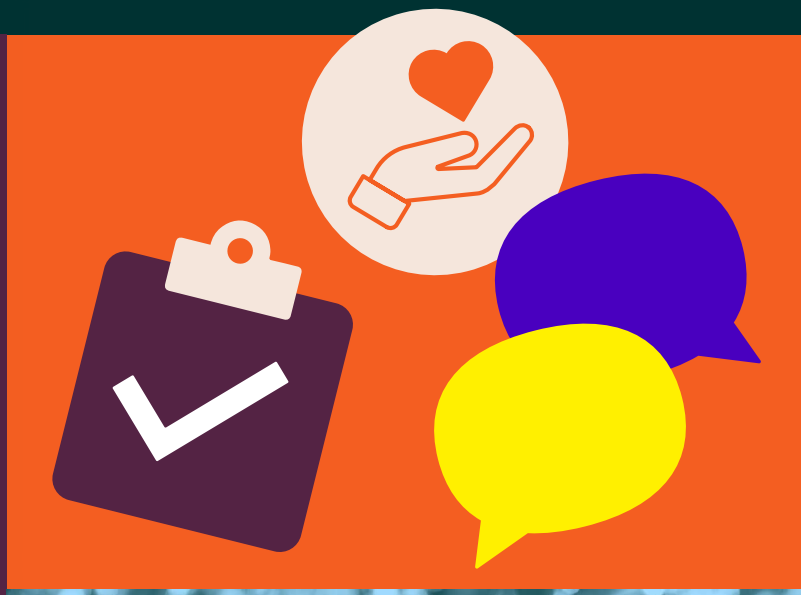
IN PERSON

A GUIDE TO FACE-TO-FACE FUNDRAISING



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Thank you to the following organisations for their support in production of this guide:

FOREWORD

For over twenty years face-to-face fundraising has enabled charities to engage with huge numbers of people all across the UK and has inspired millions of pounds of donations along with lifelong support for charitable causes from new and diverse audiences.

The brilliant conversations that are held every day are the spark that in so many cases create memorable experiences for people and relationships with charities that can last for decades.

The numbers speak for themselves. In 2022, over 700,000 people in the UK pledged their support to a charity through giving a regular gift or becoming a regular charity lottery player because of a conversation they had face-to-face with a fundraiser. This support is worth millions of pounds and provides the basis for sustainable income for charities that funds the continued delivery of their work for causes and people in the UK and all around the world.

Alongside the valuable money raised, the visibility of fundraising is important too: reminding people of

+700k

In 2022, over 700,000 people in the UK pledged their support to a charity through giving a regular gift or becoming a regular charity lottery player because of a conversation they had face-to-face with a fundraiser.

the range of causes that exist close to home or further afield, and that giving to charity can be part of their daily lives. As so much of our lives move into the digital space, the impact of speaking one-to-one in person is hugely powerful – members of the public have the chance to find out more about a cause, ask questions, and also find out about wider information such as volunteering or about what the charity does that can benefit them as individuals, for example information about health or support.

As well as being effective, face-to-face fundraising delivers proven value for money, with the cost of activity returning many times its value over the lifetime of a donor's support. Just think, someone who signs up to give £10 a month to you now, could in the future be leaving you a £100,000 legacy gift in their Will.

I'm proud to work with our members – charities and fundraising organisations across the UK – and passionate fundraisers who are committed to their cause and to working in the right way that gives the public the best experience of fundraising.

I hope that this guide can support you and your future face-to-face fundraising, whether you might be unsure if it's right for your charity, or simply have not used it yet within your fundraising strategies. It will also provide reassurance to Boards and senior staff about the continued success of face-to-face fundraising, and give confidence to charities about how they can carry out campaigns that will continue to inspire support for their causes for years ahead from the Great British public.

Dan Fluskey,
Director of Policy and Communications, Chartered Institute of Fundraising

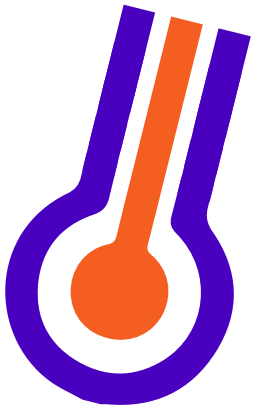
SECTION 1

WHAT IS FACE-TO-FACE FUNDRAISING?

The UK public is generous. But that generosity is so often the outcome of engaging and excellent fundraising that inspired the donation. By bringing a charity's mission and activities to life, through authentic in-person conversations, face-to-face fundraisers can spark an initial connection and help people begin their supporter journey. Followed by great stewardship, these journeys can be long, happy and mutually rewarding.

There are three types of face-to-face fundraising:

- **Street fundraising** – in a public, outdoor location, usually a busy area such as a main retail shopping street
- **Private site fundraising** – fundraisers get permission to work on private land, such as shopping centres, leisure destinations, transport hubs or at events. They must stay within an agreed area, and in sight of a promotional stand, if there is one
- **Door-to-door fundraising** – fundraisers knock on household doors and speak with members of the public on their doorstep



Face-to-face fundraisers talk to members of the public about the charity's cause and impact, and about the programmes of work they can support. Fundraisers usually ask people to sign up to a regular donation via direct debit or a regular payment by card. This could be a monthly donation or sponsorship, or a lottery ticket for the chance to win a prize. And during every conversation, there are valuable opportunities to discuss other ways to support the charity, for example through volunteering or participating in a challenge event.

A face-to-face fundraiser may be employed by a charity directly, or work on their behalf through a professional fundraising agency. In either case, they have an important role to play as a public face or ambassador for the charity and its brand.

*"The fundraiser's knowledge was phenomenal and I could tell in his voice his happiness in doing the job he did."**

“Within our transformational fundraising strategy we have a fresh commitment to our face-to-face fundraising campaigns. They play a massive part in recruiting new regular donors and we have seen this channel perform very well since covid restrictions were lifted.

There are so many people who really value being able to have a one-to-one, in-person interaction with someone who is passionate and knowledgeable about GOSH, and this is borne out in our results; on average, these supporters stay with us for many years, some for more than a decade, after signing up.”

Veronica Jaguite, Senior Individual Giving Manager, Great Ormond Street Hospital Children’s Charity (GOSH)

What about the return on investment?

Like all fundraising methods, face-to-face requires a level of up-front investment in order to raise funds further down the line. While it may take longer than some other methods to reach a positive return on initial cost, the overall return on investment is significant and long-lasting – supporters often continue to donate to a charity for many years and go on to support the charity in a range of other ways too.

> “To provide the research and support needed to make life changing impact for those affected by breast cancer, we need sustainable income streams. Face-to-face fundraising through our partner Charity Link helps us to achieve this, meaning we can plan into the future.”

Owen Collier, Acting Head of Individual Giving, Breast Cancer Now

What else do you need to consider?

*"The fundraiser was professional and polite and explained everything to me clearly."**

Face-to-face fundraising can be a great opportunity for many charities, but as with any fundraising method it needs careful planning, supported by sufficient investment and training.

Being a face-to-face fundraiser is a rewarding job and can lead to a fulfilling career in fundraising, but being out in all weathers and travelling to different sites does mean that fundraisers need to have appropriate management and support from their team leaders and organisations.

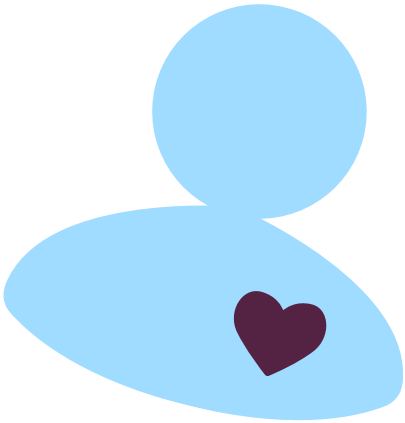
Good recruitment practices, programmes to promote wellbeing, and a culture of recognition and appreciation for what face-to-face fundraisers are doing by colleagues across the organisation are all initiatives and interventions which will foster a positive and successful working environment.

SECTION 2

THE BENEFITS OF FACE-TO-FACE

From engaging new and diverse audiences to building brand and awareness, there are clear benefits to face-to-face fundraising that can lead to a more stable and sustainable future for your organisation and its beneficiaries.

What face-to-face can achieve



Face-to-face fundraising offers the opportunity to reach out to new audiences, quickly boosting the growth of your donor base with large numbers of new regular givers.

Engaging in-person with potential supporters, knowledgeable and well-trained professional fundraisers can sensitively deliver your charity's messaging and ask, aided by creative campaign materials, imagery and even videos.

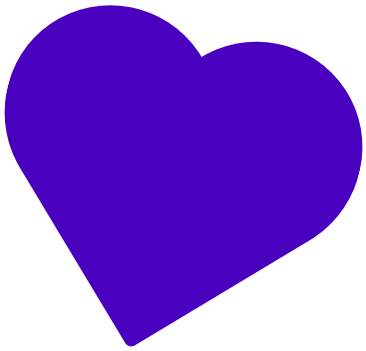
And it can be a hugely valuable method of fundraising for all kinds of charities – for large high-profile brands widely recognised, as well as for small or regional charities and those battling to cut through with a less well-known cause.

Royal Osteoporosis Society
Better bone health for everybody

CASE STUDY

With three and a half million people in the UK living with osteoporosis, the Royal Osteoporosis Society (ROS) was keen to find out whether face-to-face fundraising could help them attract new regular donors. Relatively low awareness of both the condition and the ROS itself, meant the charity was unsure how receptive the public would be. The ROS collaborated with Gather Campaigns to design an initial nine-week test campaign across private sites, including shopping centres and supermarkets. The test generated 340 new regular supporters with encouraging initial donor retention, and the charity now plans to extend the campaign.

Face-to-face has proven a valuable fundraising channel for the Royal Osteoporosis Society, it demonstrates just how quite specific causes, that may have been thought of as too niche, can be brought to the general public with success.



As the initial step in connecting with new donors, with effective management of onward supporter journeys, face-to-face can help you build long-lasting supporter relationships. Donors who initially sign up with a face-to-face fundraiser often go on to extend their support in other ways, including:

- increasing their regular donation
- making a major donation in response to a specific appeal
- participating in challenge events to raise money
- volunteering for the charity
- leaving a legacy gift in their Will
- advocacy and encouraging friends and families to become supporters
- getting involved in campaigns or signing petitions
- buying memberships, event tickets, or products from a charity's online or physical shop

It's worth remembering that a face-to-face fundraiser may well encounter an existing supporter of the charity, or someone who's received an ask via a different fundraising approach – perhaps a piece of direct mail about leaving a legacy gift. So being prepared to talk about other campaigns or a range of things the organisation does is useful.

*"The best part of my experience was the friendliness of the two fundraisers that I dealt with, and their enthusiasm and passion for the charity."**

The conversation with a face-to-face fundraiser can often have additional benefits too. For example, the individual perhaps doesn't know of a local hospice in their community, or would value information being offered, or would find it helpful to be prompted to look at a website and the services that the charity delivers which they themselves could benefit from, i.e. health advice, or forms of support they were unaware of.

> As an agency, we know that it is our duty to sign up new supporters to a charity. But we wouldn't be doing our job if our fundraisers weren't prepared to have all sorts of other valuable conversations. For the Royal British Legion for example, our teams often speak to current or ex-service personnel who had been unaware of the breadth of its services. For Cats Protection, we often come across people who want to know more about rehoming strays and want to adopt. Those conversations, and the impact they eventually had, would not have happened without face-to-face fundraising.

Kelvin Hopkins, Founder & CEO, The Professional Fundraiser; Vice-Chair, Chartered Institute of Fundraising

While not every conversation will lead to a gift on the day, it is common to see an additional ‘giving aura’ around face-to-face campaigns, where members of the public will later make a donation in their own time because they were moved and inspired by an amazing and memorable conversation with a fundraiser.

Others may follow the charity on social media, visit its website to learn more, or talk about the conversation before deciding to give at some point in the future.

CASE STUDY

DEPAUL
Homelessness has no place

In 2022, Depaul UK, a national charity supporting young people who are homeless or at risk of becoming homeless, worked with REAL Fundraising to launch their first door-to-door fundraising campaign in several locations across the UK. In addition to signing up over 700 new regular donors, Depaul UK noticed a considerable number of online one-time cash donations being made in response to the campaign. In the ‘How did you hear about us’ section, donors were selecting the ‘Spoke with a fundraiser at my door’ option. This amounted to a significant amount of income, with an average gift of over £30.

The richness and flexibility of face-to-face fundraising also makes it a job that attracts people from many walks of life. This diversity in teams is highly beneficial for engaging a wide cross-section of society.

And while the method may appear to be very ‘manual’, it is in fact inherently agile, especially when working through an agency who can control many teams over multiple locations. Daily reporting and quality of data means that, just like other channels, activity can be adjusted quickly, depending on how a site or proposition is performing, to maximise performance and impact.

As with any successful fundraising strategy, integrated use of fundraising channels can enhance your success. Face-to-face can give strong results as a standalone campaign but it is also a powerful message amplifier when used as part of a mixed-media campaign, for example alongside TV ads and social media. It dovetails particularly well with telephone.

CASE STUDY

Dogs Trust

Since 2001, more than one million new donors have signed up to give money to Dogs Trust after meeting a private site or door-to-door fundraiser from its agency Charity Link. The charity's Sponsor A Dog proposition has remained largely the same over this period, and has helped establish it as one of the country's most prominent charities. After face-to-face sign up, new supporters receive 'welcome calls', which have significantly reduced the rate of people cancelling before making their first donation. The CEO of Dogs Trust is a firm advocate, often saying that without face-to-face fundraising, a third of the rehoming centres it currently operates simply would never have been built.

The Chartered Institute of Fundraising works with councils to coordinate fundraising activity

For face-to-face fundraising to be able to have continued success, it's important that fundraising activity is managed and coordinated effectively across the UK. Certain public areas, such as a high street in a city centre, can get busy and fundraisers know that to have the best conversations with people they need to be responsible and respectful of the space.

To help ensure that local areas have appropriate numbers of fundraisers in the right areas where fundraising can happen, the Chartered Institute of Fundraising works in partnership with councils to put in place Site Management Agreements for face-to-face fundraising on the street.

We have almost 130 Site Management Agreements in place with councils and Business Improvement Districts across England, Scotland and Wales, varying from cities like the City of Westminster, Birmingham, Cardiff and Glasgow, to towns such as Barnstaple, Lichfield, Bridgend and Falkirk.

These Agreements, negotiated in partnership with the relevant council or Business Improvement District, set out where and when fundraising can take place, and with how many fundraisers. They are free of charge to councils, and where a Site Management Agreement is in place the Chartered Institute of Fundraising runs a Diary Management System for that area through which fundraising organisations can secure available street fundraising spaces. We run Diary Management Systems for London, the rest of England and Wales, and Scotland. We also manage a clash avoidance diary for Door-to-Door Fundraising in London, on behalf of the Metropolitan Police.

*"The interaction was interesting, informative, and polite. The fundraiser's behaviour was impeccable."**

SECTION 3

HOW TO GET IT RIGHT

Face-to-face fundraising can significantly increase your charity's donors and income, but like any method, there are no shortcuts to success. It requires close management and compliance with regulation. Here we look at some of the things to consider in giving your charity the best chance of success.

A key question to ask is whether you're going to work with an agency or run your face-to-face fundraising in-house, and there are advantages to both.

Professional agencies offer a wealth of specialist knowledge, and valuable experience. They are also likely to have access to innovative technology for territory planning and data capture, and a clear understanding of complex rules and regulations.

Working with them will dramatically reduce your day-to-day management commitments. However, it is critically important to invest sufficient time and effort at the start of a campaign in ensuring fundraisers understand the cause and campaign proposition. It is also strongly advised for the charity to be actively involved in training programmes and in the creation of campaign materials.

In-house teams, meanwhile, are in your immediate control, and can be closer to your brand and mission. This route may also allow you to take a different attitude to return on investment and provide a pathway for fundraisers who could go on to other fundraising roles within your organisation over time.

> “There are pros and cons to using an agency opposed to an in-house approach. Using an agency takes a lot of effort out of the process, although you have to make sure you don’t take an excessively hands-off approach. In-house is a big investment, it is a lot more work but there are lots of upsides in terms of having absolute oversight over your brand and what is happening. In-house can also tolerate a longer-term approach to ROI.”

Vernon Kenny, Face-to-Face Fundraising Manager, Concern Worldwide UK

Whichever you choose, it’s important to ensure that your fundraisers are properly trained and prepared before they head out to meet the public as your charity’s ambassadors.

Among other things this should include understanding the Fundraising Regulator’s rules, which include the legal requirement to make ‘solicitation statements’ for professional fundraisers; ensuring that a fundraiser doesn’t follow or obstruct a member of the public; and stipulations around wearing clear ID.

FUNDRAISER CHECKLIST

Have your face-to-face fundraisers:

- had robust training?
- been given opportunities to learn about the charity and their cause?
- been able to ask questions about things they find particularly compelling and any uncertainties they have?
- got a clear understanding of the supporter journeys on which people may be taken after signing up?

The codes and rules to comply with

The Fundraising Regulator's Code of Fundraising Practice sets the standards that apply to fundraising across the UK. Particularly important are chapter 1 (on general behaviour), chapter 7 (working with others), and chapter 8 (in particular 8.4, which sets out specific rules for public fundraising).

The supporter experience & stewardship for success

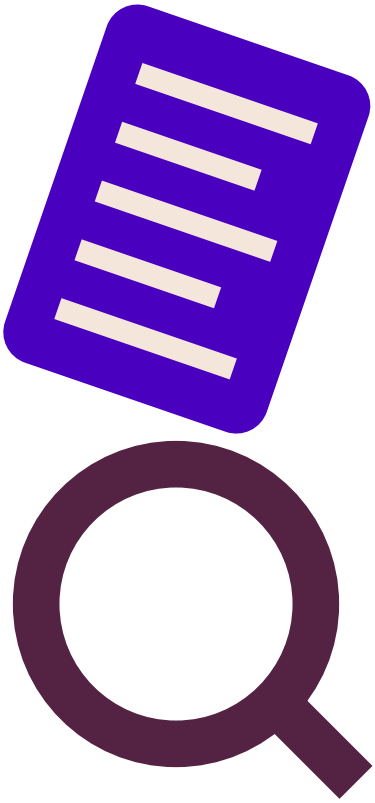
Face-to-face fundraising success goes hand in hand with great onward supporter journeys. By providing new donors with an excellent supporter experience that helps to reinforce the positive face-to-face dialogue they've just had, it's possible to build long-term relationships and lasting supporter loyalty for future proofing your charity.

Communicating effectively with new supporters, welcoming them warmly, acknowledging their gift and building ongoing rapport can maintain engagement. It also provides opportunities for generating interest in other campaigns and programmes, for example events, lotteries, petitions or volunteering, and legacy giving.

*"I found the interaction with both fundraisers very pleasant, and they gave the charity just the right feel you are hoping to find when being approached regarding these types of situations."**

“Face-to-face fundraising should not be seen as a means to an end in itself, there’s so much more potential when you consider the reach of these campaigns. Of course, campaigns must be financially viable and represent a competitive return on investment, but to do this they must be focussed on the goal of creating strong supporter relationships and choice for potential new donors regarding how they want to support your organisation. A campaign cannot be truly cost effective or impactful if it is focussed only on the upfront numbers and not the ongoing value of those relationships.”

Dominic Will, Managing Director, Gather Campaigns



Another important relationship

If you decide to outsource your face-to-face fundraising, then choosing the right agency and creating a good working relationship with them is key. While the questions you need to ask will differ depending on your charity and its aims, here are some things to think about when looking to hire an agency.

Is the agency a member of the Chartered Institute of Fundraising and registered with the Fundraising Regulator?

Being a member of the Chartered Institute demonstrates a company's commitment to best practice in fundraising and being registered with the Fundraising Regulator shows their commitment to following the Code of Fundraising Practice.

What guarantees will the agency provide about return on investment, donor signups and the fees that you pay?

Different agencies operate different models of payment and results. All have their pros and cons, and you can negotiate these to make sure they are providing your charity value for money – they must be right for you – but they must also be right for the agency.

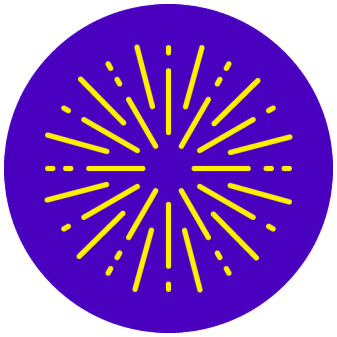
Are both the charity and agency committed to working in partnership and being open and transparent?

An ideal working relationship requires teamwork in a close partnership supported by collaboration and open dialogue.

*"The fundraiser built a rapport with myself about me before talking about the charity. It made me feel at ease. When I completed my sign-up, the charity immediately called me, which I think was a good way of reminding me of what I had committed to."**

Further questions to ask when determining whether an agency is a good fit for your charity may include:

- To what extent does the agency share the feedback it receives?
- Does it have an open-door policy allowing you to oversee/be involved in its training?
- Will you get to meet their teams on the ground, and see them in action?
- Does it operate a mystery shopper scheme?
- Can they provide testimonials from other charities?
- Have they worked with similar charities (similar size/regional spread, similar cause, similar priorities) in the past, and had success?



Supporting high standards in fundraising through mystery shopping

Being part of a mystery shopping programme is a really important way to monitor how the public experiences your face-to-face fundraising. It also helps to ensure your campaigns are being carried out to the right standards and in a way that enhances your reputation and cause.

The Chartered Institute of Fundraising manages a dedicated mystery shopping programme for members to support fundraising that happens on private sites. Mystery shopping is carried out by a professional mystery shopping company. People working for that company pose as ordinary members of the public, interact with fundraisers and observe the fundraising team.

They then record the results of the interaction using a questionnaire constructed by the Chartered Institute, which checks that the fundraiser has complied with all relevant rules and standards. This information is then passed on to the relevant fundraising organisation so they can monitor and evaluate their activity.

What results do we see from the mystery shopping programme?

Results from 449 mystery shops:

- **100%** of interactions reported that the fundraiser engaged in a polite manner
- **100%** of interactions were ended in a polite manner
- **93.3%** of experiences were rated as Excellent or Good

"The Mystery Shopping programme helps us to monitor fundraiser performance and feed back to the field on areas for improvement, and to celebrate where our fundraisers are doing a fantastic job. We can easily see any common themes that re-occur and then implement refresher training if necessary, or amend existing training programmes.

We also collate scores and these contribute to performance recognition. The fundraisers love to see the feedback from the Mystery Shops as it gives an unbiased, objective view of their performance. The reports also reassure our clients that our fundraisers are fully compliant, and that improved performances will lead to increased sign ups."

Graham Sumeray, CEO, Charity Link

SECTION 4

THINGS TO LOOK OUT FOR

Like all fundraising and marketing channels, and indeed all of a charity's activities, there are some risks. These can never be eliminated entirely but they can be mitigated, and the first step to doing this is to understand what they are.

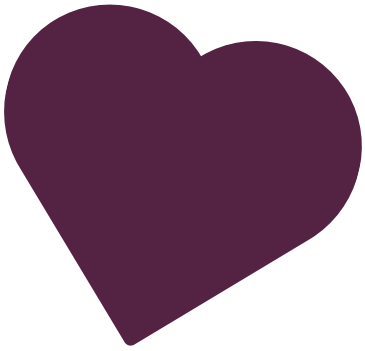
Complaints and reputational risk

As with all fundraising, the reality is that some complaints will happen. The Fundraising Regulator's Annual Complaints Report gives details for complaint rates across fundraising methods gathered from a sample of the UK's largest fundraising charities. For example, in 2021/22 for every 9,700 households visited by door-to-door fundraisers there was only 1 complaint made, and for private site fundraising the ratio of complaints to people signing up to a donation was 1:665.

It is important to remember as well that a complaint may be a general expression of a dislike of being asked for a donation, without any issue or problem relating to any rules being broken. The important thing here is to ensure continual high standards and compliance so that any dislike from the member of the public is subjective rather than being caused by bad practice, and to ensure you have clear processes for monitoring and dealing with these complaints.

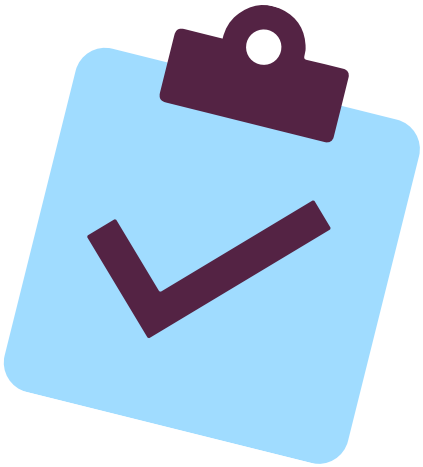
> When you factor in the number of people who have been inspired by conversations with face-to-face fundraisers, the very small risk of complaints is something most organisations should be comfortable to take. It is of course important that organisations charities work with have a clear process for minimising and responding to complaints. Charities should feel reassured that providing they have selected their supplier well, they can proceed in good confidence on a campaign with low complaints and happy inspired donors.

Liam McEntegart, Managing Director (Client Service), REAL Fundraising



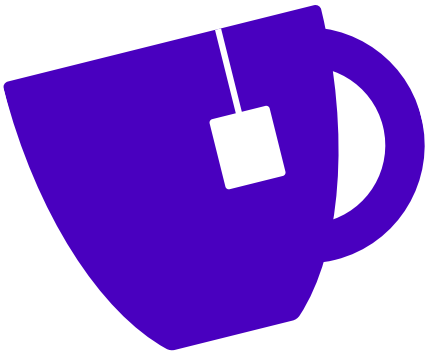
People matter

As with any supplier, partner or in-house team, you need to be certain that face-to-face fundraisers are treated with dignity, fairness and due regard to employment best practice. Considerations about the employment model and how face-to-face fundraisers are paid should be considered as part of decisions on working with a fundraising partner.



Likely considerations will include:

- Is fundraiser health, safety, and wellbeing proactively looked after?
- Can the agency/team demonstrate its commitment to equality, diversity and inclusivity?
- Do employment practices live up to your charity's expectations?



If face-to-face fundraisers are employed in-house, particular attention should also be paid to employee engagement and retention. If they are engaged through an agency, the charity should discuss what role they can play in motivating and engaging the team, to ensure mutual success.

*"The fundraiser was polite and professional. They went through all requirements on the tablet slowly and showed me all of it and read it as well. Very good and professional behaviour. The fundraiser wasn't pushy and I never felt that they were in any hurry of closing the sales."**

Further information and useful resources

For more information on the Chartered Institute's services to support face-to-face fundraising go to Chartered Institute of Fundraising – Compliance

Our wider guidance and resources to support all forms of fundraising can be found at Chartered Institute of Fundraising – Guidance and resources

***All quotations appearing in this guide that are unattributed are verbatim quotes provided in mystery shopping reports received by the Chartered Institute from February and March 2023**

FUNDRAISING ORGANISATIONS THAT CONTRIBUTED TO THIS GUIDE

acwyre

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BREAST CANCER NOW The research & care charity

charity link
Passionate about fundraising

CONCERN worldwide

DEPAUL
Homelessness has no place

gather
CAMPAIGNS

GREAT ORMOND STREET HOSPITAL CHARITY

REAL Fundraising

Royal Osteoporosis Society
Better bone health for everybody

The Professional Fundraiser
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About the Chartered Institute of Fundraising

Together we are the future of fundraising. We champion our members' excellence in fundraising. We support fundraisers through professional development and education. We connect fundraisers across all sectors and skill sets to share and learn with each other. So that together we can best serve our causes and communities both now and in the future.

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