

**Why are some hospices
able to generate £millions
from their lottery programmes
& most hospital charities
are struggling to generate 1/10th of that?**

**Because adult & children's hospices
have used the power of
face-to-face recruitment
to unlock the full potential of their
lotteries & Regular Giving Programmes.**

**We can help you grow your lottery income
to £1million per year within 5 years,
because we know how to
responsibly & successfully
recruit face-to-face within hospitals
for hospital charities.**



**the
fundraising
partnership**

Changing the face of face-to-face fundraising

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Foreword from Kevin Mann, Managing Director of The Fundraising Partnership

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Hello everybody & welcome to this brochure produced by The Fundraising Partnership.

Clearly, the purpose of this document is to promote the company & hopefully help us find new charity partners, but we wanted to do more than just provide a bland corporate advert.

Instead, we wanted to share with you our excitement about the potential for high quality face to face fundraising to transform the income of hospital charities.

"If you want other people to be interested in what you are saying, say something that is interesting to other people & try & say it in an interesting way."

It is not an accident that we called ourselves a partnership. It is very much a team effort to run our company & we believe in the power of teamwork & collaboration rather than being a "one-man band". Our current charity partners will tell you about how our partnership approach creates a genuinely different relationship & adds additional value.

We provide ourselves on being a values-driven company & we say that you can read our values from our practices & decisions - that the company values run through everything that we do like the lettering in a stick of rock.

We want to use our skills and our expertise to help hospital charities raise more money so they can do more money for the community they serve, and we also want local people to have the opportunity to support the hospitals that they love.

Yours in partnership

A handwritten signature in black ink, appearing to be 'KM' with a stylized flourish.

Kevin Mann
Managing Director
The Fundraising Partnership



Why have charity lotteries been so successful?

The screenshot shows a news article from CIVILSOCIETY. The article title is "Society lotteries raise over £300m for charities and good causes in record year" dated 29 Nov 2019. The author is Harriet Whitehead, with 964 articles. The article text states: "Society lotteries raised £332m for good causes last year, according to recently published figures by the Gambling Commission. This was an increase of 11 per cent or £32.95m on the previous year. The Gambling Commission recently published statistics relating to the period between April 2018 and March 2019, which also show that the amount raised by the National Lottery for good causes was £1.5bn, a drop of 1.5 per cent." An image of a corkboard with a blue pushpin holding a white card with "AC 620569" and "13" is also visible.

Charities are raising increasing amounts from lottery programmes & its growing year on year.

The secret is that it isn't about the lotteries at all.

This growth has happened whilst the reputation of the national lottery has tanked & growing concern about gambling problems in society.

The real story is that it isn't about the lottery at all its about face-to-face recruitment of small amount long term donors to appealing good causes.

People in charity lotteries are not really lottery players at all they are charity supporters that have been recruited into a lottery programme because its fun & affordable & they have been actively asked.

The screenshot shows a Trustpilot review for "The National Lottery". The review has a rating of 1.2 out of 5 stars, based on 2,401 reviews. The review is marked as "Bad". The star distribution is: 5-star (4%), 4-star (1%), 3-star (1%), 2-star (3%), and 1-star (91%). There is a "Filter" button and a "Sort: Most relevant" dropdown.

It's not about the lottery it's about face-to-face supporter recruitment

Why have charity lotteries been so successful?

We believe that Hospital charities are missing out on a really important income source & an opportunity to engage the local community as active supporters of the local hospitals that they love.

The income potential for each hospital charity is significant. Not just the regular unrestricted income from the lottery but the pipeline of warm prospects for legacy giving.

You build this with cause led face-to-face fundraisers taking the message out to people about the amazing work of hospital charities & recruiting them into a very attractive & affordable way to give & make a difference.



But although lotteries can be a great form of gamified giving, these supporters don't join just because they can be in a draw.

The join because they have been actively recruited & to feel part of something & make a difference.

Nearly all hospice lottery supporters have been recruited face-to-face

Charity lotteries are small regular donor programme

Lottery programmes and Regular Giving Programmes are variations of the same concept.



Lots of people, giving a small amount regularly, to make a bid difference together.

Lots of people giving a small amount regularly, for a long time.

If you recruit face to face you can create a large supporter base with an annual income to match and the potential to yield additional contributions.

If you sell the cause and not the form of donation you get better long-term support. Selling charities as lotteries actually makes them less effective.

The reason that hospices have grown their lotteries is because they have had the investment on face to face and Regular Giving hasn't. Done the right way it doesn't actually matter whether you are promoting regular giving or lottery at all. You can do either or both using almost the same approach.

What gets people into small regular donor programmes?

Ask

No one does this unless they are asked, but lots of people will very willingly do it they are asked. If you rely on posters & leaflets & social media & people doing it themselves, you won't recruit.

Instead get a nice person to ask people in a nice way & set up their support for them.

Simplicity

Small regular donations are easy to understand. We don't ask for a lot from each person so its not a big decision & (nearly) everyone can be included.

We just ask people to keep doing and we recruit lots of supporters. Its appealing simple, quick & straightforward with no catch.

Cause

The primary motivations for long-term lottery or regular giving supporters is the charity & the cause. Its not the lottery or the prizes or gift aid.

People want to give to their local hospital & make a difference, but no one is actively asking them.

Belonging

People have an emotional bond to their local hospital. If they support it, they want to feel part of it.

Make them feel valued & show the difference they make through a good, subtle supporter journey strategy & they will keep giving & give in extra ways.

Income streams from small regular donor programme

Key characteristics of the income from lottery & regular giving programmes are:

- **Unrestricted income giving the charity the scope to use the income where it is most needed without strings or conditions.**
- **A reliable & ongoing income year after year that can help with budgeting & planning.**
- **An inclusive supporter recruitment programme - because the amount is low, most people could give in an affordable easy way.**
- **The average donation amount per supporter is in excess of £300 – its not just £1 per week it's £300 over 6 years.**
- **It continues to grow in value with ongoing investment but also leaves a significant future income if recruitment is halted.**
- **During the pandemic lockdowns, many charities lost nearly all of their income from other fundraising sources such as retail or events but the supporters in the lottery & regular giving programmes kept contributing.**
- **Regular giving & lottery programmes are also resilient in the face of economic downturns because they involve only a small financial commitment (under £10 per month). Small regular donors keep giving when larger donation amounts may be vulnerable.**

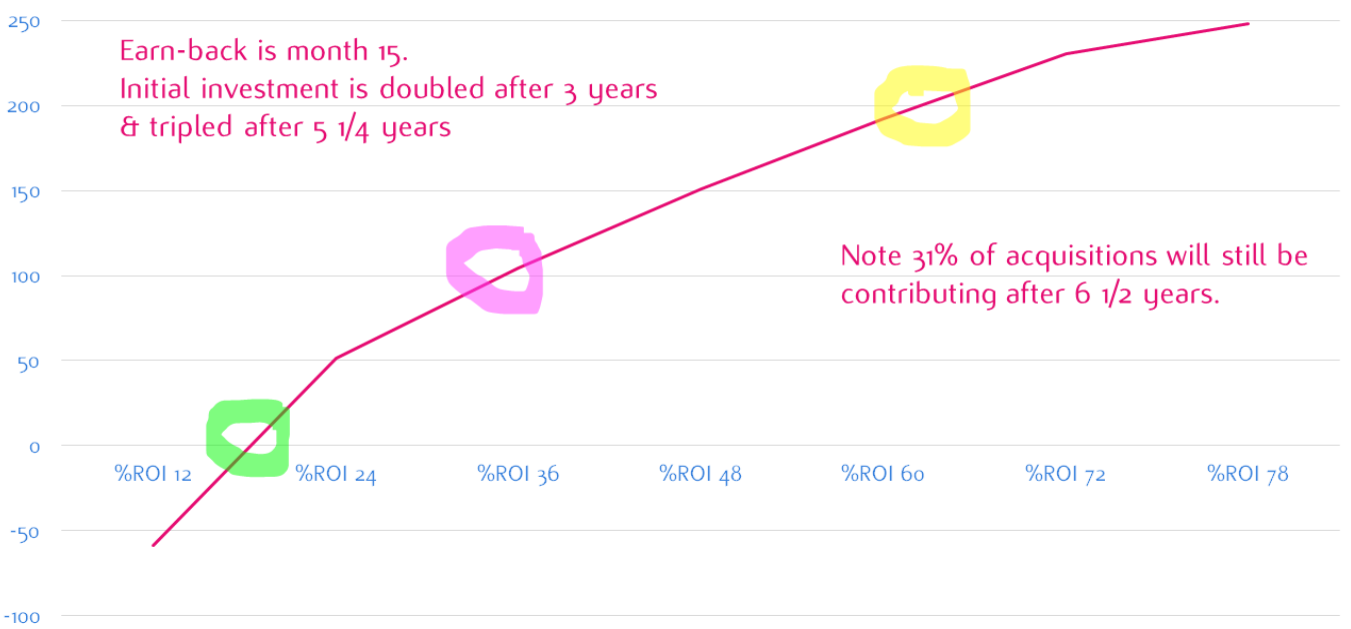
A small regular donor programme with 20,000 supporters generates £1m pa

Small regular donor programmes give outstanding long term RoI

Lottery & regular giving programmes are a relatively low-risk way to deliver a large recurring income & they offer a great return on investment, but they start slowly.

It takes some time to make back the cost of acquisition – typically 15 months – but after that the overheads are very low so the return grows month by month until after 6 years the RoI can be up to 500% or even more. Recruiting high retaining supporters is beneficial because it does shorten the length of time until the investment is repaid & it also increases the overall life-time return.

LOTTERY CAMPAIGN RETURN ON INVESTMENT PROJECTIONS



Beyond that, the ROI continues increasing by about 100% per year as there are many supporters that continue until they pass i.e. may contribute for 20 or 30 years or even more. There is a lack of reliable data about this but every hospice that has had a lottery for 20 years or more typically has 20 or 30% of supporters who joined in the 1st month. The actual lifetime value of each lottery player is almost certainly significantly greater than the £300 that we know about at this stage.

Small regular donor programmes can transform legacy income



Lottery & Regular giving supporters create a warm database of supporters to convert into legacy donors.

The average legacy donation to charities is £28,000 & a well-run conversion campaign should convert 6% or more.

That means that a lottery & regular giving programme with 20,000 supporters could easily yield in excess of £30 million in legacy donations in addition to an ongoing income of £1 million per year.

We think any charity looking to grow its legacy programme should be integrating a face-to-face lottery & or regular giving programme into its legacy strategy.

It will take 44 years and 1.75 million more London Marathon runners to raise the same amount as is donated in legacy gifts, every year.

legacy **Voice**

Conversion rates & cost per acquisition will be far better from a pool of existing, warm supporters who already know of the charity & its work & have demonstrated the ability & inclination to give in practice.

Face to face recruitment of regular supporters creates the pipeline for future legacy income. It not only gives you an ongoing incoming its also an investment to create warm legacy leads for the future.

A small regular donor programme with 20,000 supporters could yield £30m+ in future legacy donations

Face-to-face is the original outreach marketing strategy



Almost no one joins a charity's regular giving or lottery programme spontaneously but large numbers of people will do it if asked, & if asked in the right way.

It is not only the only effective way to convert large numbers of people into donors, its also the best way to bring new supporters in.



A good face-to-face fundraiser can listen & can be emotionally engaging, they can be responsive to the supporters' interests or concerns, they can provide clarity & answer questions & they can qualify for vulnerability & route people to the right form of support for them.

Typically, charities talk about needing at least 3 meaningful contacts to convert general support into actual assistance. That applies when it's a media contact like a TV advert or a Facebook posting. But just a single in-person face-to-face ask will convert latent support into active support & will launch the supporter journey in the best possible way. But to do this you need the right people representing you & in the right way.

Face-to-face can take a contact from introduction to support in just 1 contact

The case for face-to-face

The primary reason that adult & children's hospices are able to generate such large regular income from their lottery & Regular Giving programmes is because they have successfully invested in face-to-face recruitment of supporters.

We are aware of no local hospice or children's hospice that has grown its lottery or regular giving programmes by any significant amount without primarily using face to face recruitment.



Recruitment via leaflets or social media typically yields dozens of supporters each year compared to the thousands that face-to-face recruitment can deliver. Supporters recruited face-to-face give twice as much as supporters recruited via other methods.



Face to face
also brings
massive added value

Effective face to face is the ultimate outreach campaign – a walking, talking version of your impact report

- Effective personalised awareness raising of the charity & its work generally
- Effective promotion of any specific campaigns or events or activities or volunteering opportunities
- Increased one-off donations from those who don't want to give regularly

**Only face-to-face brings both
mass supporter recruitment
& major added value**

Why people worry about using face-to-face supporter recruitment?

No one wants chuggers or double-glazing salespeople pestering patients or being associated with the hospital charity .
To change the face of face-to-face fundraising we start by changing who does face to face fundraising & how they do it.
Everything changes when you start by changing that.





Changing the face of face-to-face fundraising



Excellent, sensitive face-to-face fundraising is all about who you have representing you. Its all about the people who are doing the job.

The average age of our fundraisers is 58 & is 2/3rds women. Our fundraisers are professional people who have life experience and are motivated to do a worthwhile job for a great cause.

They can engage people in conversations, listen & speak with authenticity & sensitivity about the importance of care & the difference the charity makes.

They deliver the best supporter retention in the industry and are effective and sensitive ambassadors for your charity.





Working in Hospitals On behalf of Hospital charities



the
fundraising
partnership

The hospital environment

Because we have experience & expertise in working within hospitals, we know that a critical ingredient for success is to understand the environment of the hospital. Although there are common elements every hospital has its own distinctive characteristics & quirks.

Part of our commitment to excellence is about caring about the details, so we like to really get to know the environment of each hospital & then we use that to deliver the smartest solution to deliver high quality supporters.

St Michaels Secondary site
1XFR 1-5dXpw
10-50PW

BHI Secondary site
1XFR 1-5dXpw
20-50PW
Atrium and café
Side entrance to RFI

BHOC Secondary site
1XFR 1-5dXpw
10-50PW
Reception, small shop
Back entrance to RFI

BRI Primary site 1
2XFR 5dXpw
80-150PW

BRHC Secondary site
1XFR 1-5dXpw
10-50PW

Dental hospital Ancillary or Secondary site
1XFR 1-5dXpw
10-30PW

Eye Hospital Ancillary or Secondary site
1XFR 1-5dXpw
10-30PW
Café?

University Hospitals Bristol Map

A free shuttle bus service is provided for patients, visitors and staff. Please contact the Transport Services department for further information and to arrange to visit our hospital sites.

University Hospitals Bristol NHS Foundation Trust

- Based upon information received from site visits
- Based upon information received from site visits
- Based upon information received from site visits
- Based upon information received from site visits

Map labels include: University Hospitals Bristol NHS Foundation Trust, St Michaels, BHI, BHOC, BRI, BRHC, Dental hospital, Eye Hospital, and various streets like Marlborough Parade, Maudslayi Parade, and East Street.

We will conduct a site survey that will enable us to identify the various locations that could be used for face-to-face fundraising & the times that this is most likely to be effective in each case e.g. when surgeries operate but also the physical constraints of each location & the traffic flow requirements.

The hospital environment

Its is not only about footfall – linger time is also a factor for example. You can also customise the messaging to suit the department that you are working near using examples of charity impact that relate to say the eye hospital or the dentistry department etc. This is part of the field insight that an experienced team, working in partnership with staff on the ground can bring.



You get to know the common directional questions to specialist wards or to facilities like toilets & cafes or where the car park ticketing machines are. Helping the patient experience not only just helps the hospital it is also a different mindset for the fundraiser & of course if people see you being helpful it does them more inclined to sign up with you. It's a virtuous circle.

This also means that we don't over-work areas & create cause fatigue or irritation & it means we can flex around other requirements such as other people using public spaces.



Knowing the charity

Because we have experience & expertise in working within hospitals we know that hospital charities do amazing things that make a real difference to the public & which really resonate with potential supporters.

One of the 1st things we do is seek to understand the charity, & specifically its past impact really well. Scanning through websites & impact reports to find the examples & the stories that we can use to recruit future supporters. These will typically cover a range of impacts from big to small covering medical equipment but also seemingly small enhancements to the patient experience. Different types of examples will connect with different people & they also should show how the charity uses funds to supplement & not to replace proper safe funding of the NHS & your local hospital.



We then deploy this information into every aspect of our campaign plan such as literature & pitch laminates, stands & displays, welcome emails, fundraisers training & even fundraiser recruitment. The past impacts of the charity and the difference they make are the “selling point”.

Broadcasting your impact

Most Hospital charities have a massive impact. Many produce a great impact report full of great numbers, great examples and great stories. Unfortunately, these great messages don't always reach as many people as we would like.

But imagine if you can take all that material and deliver it in person and face to face. Suddenly all the effort starts to get much more traction, as you actually convert it into supporters and therefore income.

EQUIPMENT

FMI SCANNERS FOR ST MICHAEL'S HOSPITAL

Funded by the 2018 Bristol to Paris Cycle Challenge, a new MRI scanner has been purchased for St Michael's Hospital. The scanner will be used to scan patients with a variety of conditions, including cancer, stroke, and heart disease. It is the only MRI scanner of its kind in the South West. The new scanner, costing £750,000, was used to scan the first patient on 15th February. It is the first of a new generation of scanners to be installed in the South West. The scanner will be used to scan patients with a variety of conditions, including cancer, stroke, and heart disease. It is the only MRI scanner of its kind in the South West.

MRI SCANNER FOR SOUTH BRISTOL COMMUNITY HOSPITAL (SBCH)

A new £1.1 million MRI scanner was funded for SBCH in February 2020. The scanner will be used to scan patients with a variety of conditions, including cancer, stroke, and heart disease. It is the only MRI scanner of its kind in the South West. The scanner will be used to scan patients with a variety of conditions, including cancer, stroke, and heart disease. It is the only MRI scanner of its kind in the South West.

PHOTO SNOOP CAMERA

A photo snoop camera has been installed in the waiting area of the South Bristol Community Hospital. The camera will be used to monitor the waiting area for any suspicious activity. It is the only photo snoop camera of its kind in the South West. The camera will be used to monitor the waiting area for any suspicious activity. It is the only photo snoop camera of its kind in the South West.

"IT CAN BE VERY DIFFICULT TO EXPLAIN TO A CHILD, BUT NOW SHE CAN SEE HOW IT IS IMPROVING."

When people find out about what hospital charities do they really do want to support them & face-to-face is the best way to get that message out there & convert it into tangible support. Face to face is the bridge between the great work that hospital charities & the public who aren't really aware of it & how to support it.

For some people it will be the new piece of equipment that the charity could get sooner and the numbers of people that benefit that resonates with them. For others it will be extra comfortable chairs for dads in the maternity ward. For other it will be the art projects, or it might be extra toys and book in the children's ward, or it might be relocating lockers to make life easier for doctors & nurses in a specific ward or it might be improvements to the waiting areas. Occasionally it will be something really visible like the relocation of the helicopter pad. For many it will be the sheer number & variety of ways that a hospital charity benefits patients & visitors.

When our fundraisers are talking with potential supporters they can be cause led & not be "people selling a lottery". This cause authenticity is vital in recruiting the high retention supporters that will yield the best return on investment.

Code of Practice for Working for Hospital Charities



The ultimate test of professional sensitivity of fundraisers



Be a humble but proud part of the hospital community





Why we want to work on behalf of hospital charities



the
fundraising
partnership

Why we want to work for hospital charities



Kevin Mann Managing Director

It has been a privilege to work with & on behalf of hospital charities in the past.

We believe that we can help you raise a lot of money & take your message & brand out to the community.

We feel working in hospitals is a specialism within the face-to-face sector. We believe that we have more hospital specific experience, practical insight & better values alignment than any other face to face agency.

We are a cause led fundraising company. We are passionate about raising funds for hospices & health charities. We specialise in fundraising sensitively for causes that are literally about life & death.

We recruit mainly older people with life experience who are motivated to do a job that is worthwhile for cause that they care about.

We are passionate about our NHS & many of us already have years of experience of working in hospitals for hospital charities. When we set up the Fundraising Partnership our medium-term strategy was to help hospital charities benefit from excellent face-to-face fundraising.

We want to use our skills & expertise & passion to raise funds for hospital charities & we also just love the experience of being part of a hospital.

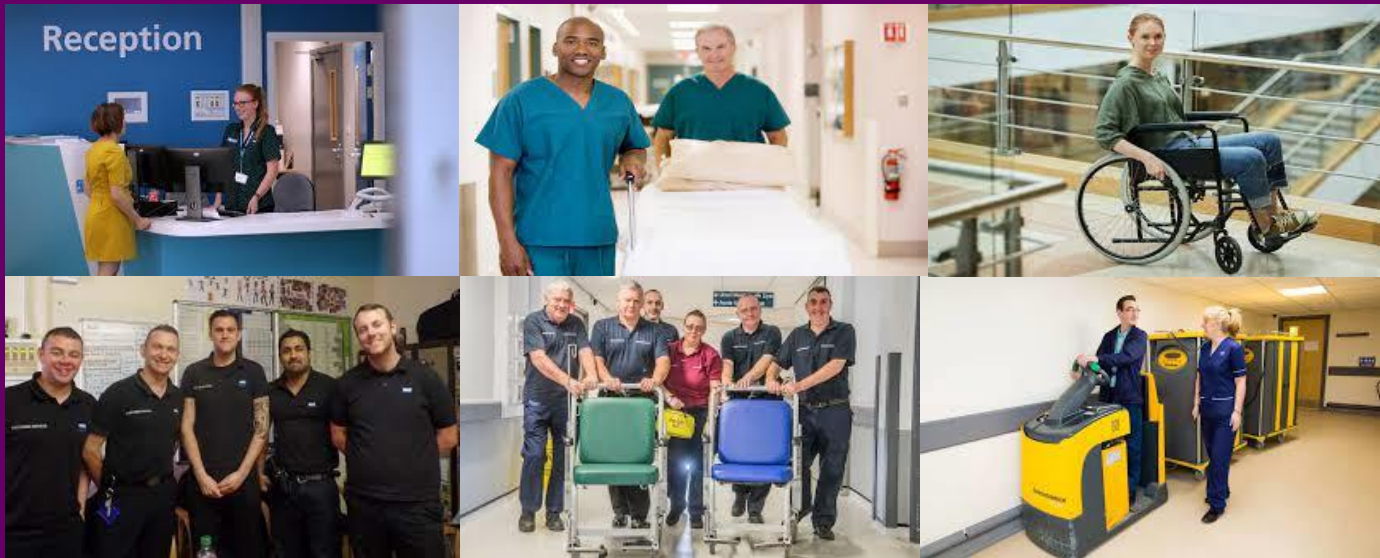
Why we want to work for hospital charities



Diane Simmons has worked on behalf of several hospital charities over the last 5 years in multiple hospital locations.

"I like to work but money is not my primary motivation at this stage of my career. I want to enjoy my work & feels its worthwhile & that is why I love working in hospital on behalf of hospital charities.

But I also love the people that you meet every day both patients & staff. So many stories, so many really lovely people & just so much always going on. You really feel part of something & you want to play your part too.



I feel very proud & honoured to represent hospital Charites & to help them make a difference. I just absolutely love it."

Why we want to work for hospital charities



Christine Walton has worked in various sales jobs all her working life & 8 years ago moved to working as a charity fundraiser.

“ I had never thought of doing something like this before but now that I have its actually the best job that I have ever had”.

Using my skills for charities that make such a difference is very fulfilling, but also I just love being out there talking with people.



Hospitals are great because there is such a variety of different people. I love to hear their stories & experiences & there always so much going on. It a really exciting place to work & I like to really get to know about the hospital so I feel part of it, understand what different departments do but also so I can help people if asked.

I get a real buzz from working in hospitals.”

Why we want to work for hospital charities



Richard Hill moved into charity fundraising 6 years ago after a career in the corporate world & has worked in several different hospitals for different charities.

“Like many people in Britain I am devoted to the NHS, so there is nothing I enjoy more than using my skills to give something back by raising funds to help more people.”

I like to immerse myself in the world of each hospital, so I really feel rooted in it & I like to get to know the staff you see every day.

It can be a challenge just to work out what all the different uniforms are!



I have always made a real effort to become friendly with all the reception staff, the porters, the volunteers from the charity but also hospital friends. I want everyone to think - “*Oh great Richard is in today*” rather than “*What are they doing there?*”



Hospital charities give you such great examples of the impact the charity has if you look for them. These can be crafted into really appealing, enjoyable & persuasive stories to share with people & recruit supporters.

I also feel it’s a place where sensitivity & tact are vital, so I really feel I am using all my skills & attributes when I work in a hospital.

Why we want to work for hospital charities



Nick Berg is the CEO of the Fundraising partnership but has also spent considerable periods of time working as a face-to-face fundraiser in various hospitals.

I really believe that working within a hospital on behalf of a hospital charity requires an enhanced set of skills beyond those of face-to-face fundraising in other contexts and settings.

When you start working in a hospital its almost overwhelming at first. There are so many signs & corridors, & uniforms & so many people wandering around & all kinds of things going on. I can remember the shock of seeing patients in handcuffs with security for the 1st time for example. It gave me scope to take my face-to-face fundraising skills to another level & as someone interested in method and technique and craft this was very satisfying.



Then over time you get to know the hospital better - the regular staff and volunteers, you get more familiar with different types of patients, you sharpen us your sensitivity and vulnerability detection. I also took pride in helping the charity increase its one-off donations and its sales of branded merchandise.

What was most inspiring was talking about the impact each charity had, whether it was talking about equipment or just pointing at the giant badger sculptures behind me to explain the contribution of arts projects in hospitals.

Introducing The Fundraising Partnership



the
fundraising
partnership

Changing the face of face-to-face fundraising



palliative,
neurological
and bereavement
support

For Sue Ryder, how our supporters think & feel about us & our work is paramount & we must truly trust the fundraising agencies we partner with to put our needs first. The expectations the general public has about charities & how they fundraise has changed & we need to work with agencies that embrace that need to change.

As the UK Lottery & Regular Giving Manager for Sue Ryder & having set up & managed charity lotteries over the last 10 years, I've worked with several agencies across the industry. I've seen some exceptional practices but also some poor practices too. I have found that truly exceptional agencies are few & far between.

Whether any agency flourishes or fails is dependent upon its culture, upon its management team, upon its fundraisers & the quality of their sign-ups. Recruiting poor-quality fundraisers & managers will result in poor quality sales & lead to longer-term sustainability issues with attrition & complaints rising to unacceptable levels.

I have worked with the senior team at TFP for several years at previous agencies & know that they are the driving force for quality, compliance, & attention to detail & that their values align with ours. The whole team is committed to driving sales & enhancing our brand through passionate interactions with the public & this meant that when they stepped out to set up their own agency, I was delighted to bring them on board.

Having worked with TFP for 18 months, the quality of signups & low attrition ensure the LTV of our lottery donors is increasing & the quality conversations they have are further enhancing our brand & reputation. Unlike other agencies, we have very few problems to deal with around public interactions & those we have are dealt with really well.

They listen & are responsive & they are honest & open about what they can do & any challenges. TFP don't say things that they don't intend to deliver, & they really commit to everything that they do. This makes the relationship so much easier & better than with other agencies. The entire team is devoted to delivering for us from top to bottom & it shows in every interaction & every aspect of their work. No agency is more focused upon quality or has greater insight into what drives it & how to deliver it. They talk the talk, but they really do walk the walk too.

I am very proud to be the Claire House Individual Giving Manager, but I also feel very humble & I feel a real sense of responsibility.

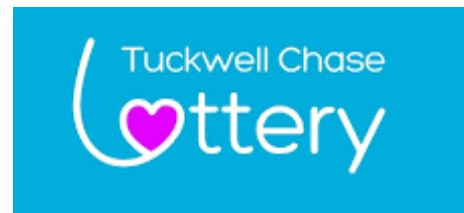
At Claire House, we have a well-established lottery that has been built up over a number of years. It is now yielding over £1.3 million every year to support the local children & families that we care for.

In the first half of 2021, we were just coming through lockdown periods where our lottery had been a main source of fundraising & had proved to be a vital income stream for our charity. We knew that we needed to grow our lottery & as The Fundraising Partnership were setting up, we had faith that they could help us to do this. It was a big step for us to engage with them but what convinced us then, & has been proved since, was their leadership & the quality of their work.

The relationship we have with them is honest & open & they have responded positively to any challenge we have set them. They really understand us as a charity & all aspects of lottery face-to-face fundraising. This is a very well-led company with integrity & values that are aligned to Claire House, & this is shown in the excellent quality fundraisers they employ. As a result, we have a very high level of trust in The Fundraising Partnership to always do the right thing for Claire House.

Our Charity Partners

As you can see, we specialise in working on behalf of health charities dealing with sensitive issues like end of life, bereavement, cancer & strokes. Many of our charity partners are local charities that rely on fundraising from within the local community & where local reputation is paramount.





the fundraising partnership

Changing the face of face-to-face fundraising



Partnership is at the heart of everything that we do.

Our fundraisers connect the public to your charity as supporters.

We are also driven by our beliefs, mission, vision & values.

We are a values-led company & our values run through everything that we do.





For too many organisations their mission statements are interchangeable management buzzwords that could be used about any company in any industry - sounds good but says nothing.

Our corporate statements are different. We have thought about them, & they reflect what we feel & what we believe & are intended to make us distinctive.

They are also our creed. We tell everyone about them, & we expect & want to be judged by them. They define our behaviours & choices. We are a values-driven organisation & our values run through everything that we do.

BELIEFS



**We know what we know,
what we are good at & what we don't know.
What we know is face-to-face fundraising**

**We believe in our charities –
we put their interests 1st
We respect & seek to learn from & with
their staff.
We seek to make our colleagues look good!**

**We believe
passionately in the
value of face-to-
face fundraising**

**We believe in the
value of inclusive &
resilient low value
regular donation
fundraising**

**We believe the
future of f-2-f will
be about
professionalism,
sensitivity &
adding long-term
value**

**We believe in
Partnership &
collaboration to
deliver & improve**



The mission of the fundraising Partnership is:

to create a sustainable business

that delivers a sustainable income for charity partners from high retention supporters recruited by face-to-face fundraising

& a sustainable work-life balance & income for our fundraiser partners to live on.

Our vision is to be:

the most trusted fundraising agency working in face-to-face charity fundraising.

We will achieve this by turning our values into practices

to create a company that provides something fresh

& is genuinely & significantly better than any of the alternatives.

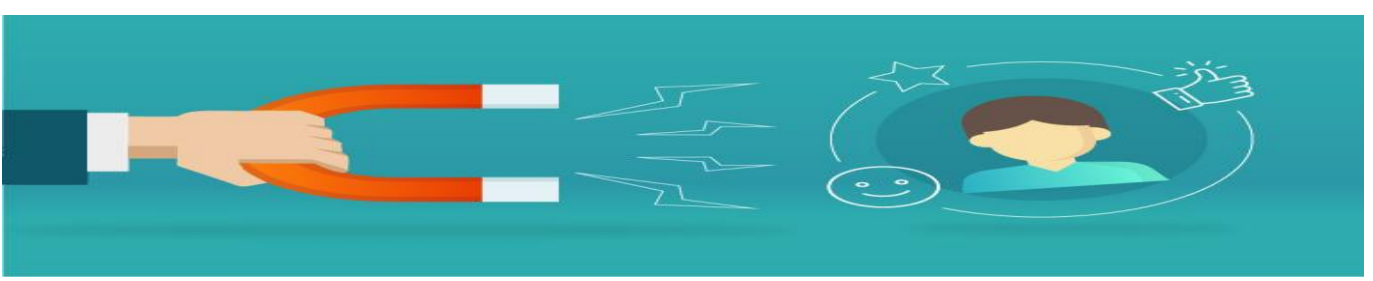
Our mission is all about long-term sustainability in what we deliver. Delivering work-life balance for our fundraisers is part of our mission statement. Trust & delivering on our values is at the heart of our whole business strategy.

Employ great **People** & give them great training & support to achieve great results

Data
+ Experience
= **Insight**
= Better results

Excellence comes from leadership,
+ systems
+ culture





High supporter retention is written into our mission statement – it is part of our company DNA. Our supporter retention rates are emblematic of our company’s commitment to excellence.

This form of fundraising has always been all about long-term ROI which is driven by retention which is driven by smart acquisition or smart recruitment.. We think we know more about retention than any other agency & are at the cutting edge of improving not just retention but how to gain added value from supporters.

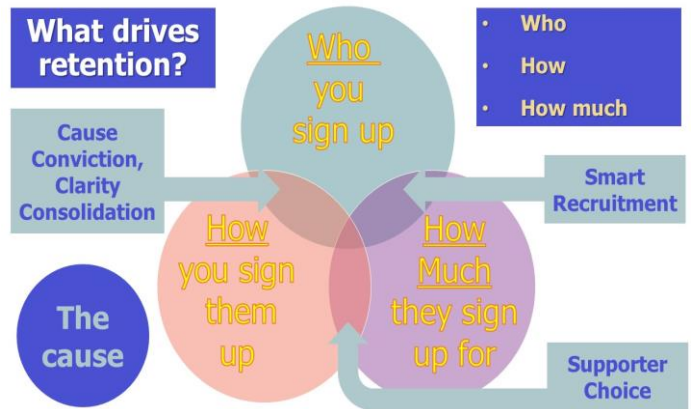
We want to shift the paradigm of how people see lotteries & lottery players. That is why we choose to talk positively about retention rather than just passively accept attrition or treat supporter loss as random cancellations. Our Insight work is at the forefront of all of this.

Excellence in supporter retention

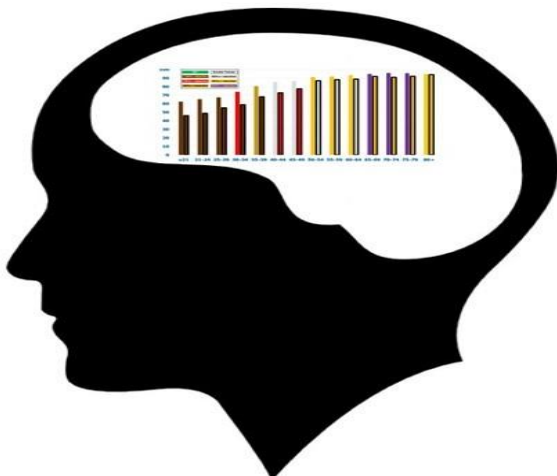
Why it matters and how to do it

Supporter retention is part of our messaging within all our staff recruitment & training – there is a specific module about how lotteries deliver funds for charities & what drives supporter retention.

We have a retention model which we have developed to reflect the insight we have gained about those factors such as age & cause conviction



Retention Cognizant



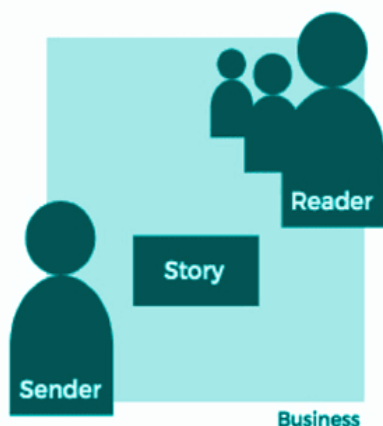
This is an ongoing project to build a team of fundraisers that are “retention cognizant” rather than impose quotas or rules. Supporter retention is embedded in the company culture as a positive source of pride not an afterthought or a problem. It’s in the mind of our fundraisers as they are in the field.



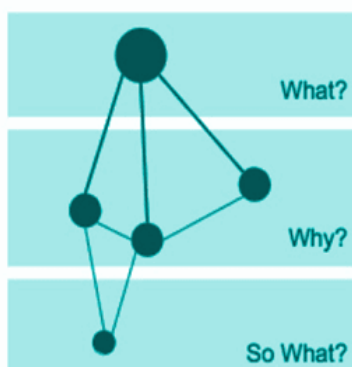
At The Fundraising Partnership, we are passionate about the value of small amount, regular donations & the value of face-to-face recruitment of supporters. Our passion is for doing this as well as it can be done & we love the craft of doing it to an excellent standard. Only excellence delivers the full benefits & minimises the drawbacks.

Insight is a blend of both data & experience & judgment. The more insight that you have into all aspects of the process the better the results that you can get.

Context



Narrative



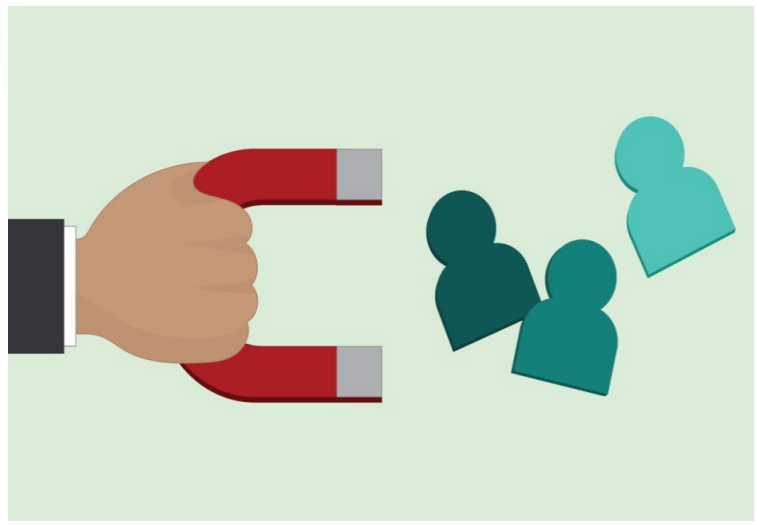
Effective Visuals



Using data to drive insight is far more than just seeking simple answers in numbers. It takes time & effort to generate useful data & the skill to interpret it & apply it. That is why we have employed a dedicated data analyst to drive this work.

How you communicate insight to influence data is at least as important as how good the data is. We employ great people as fundraisers, & we seek to use data to help them be even more successful by sharing what we learn with them rather than imposing rules & quotas.

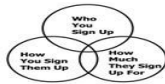
So how we use data is a blend of our commitment to excellence with our skill in developing insight & our skill in managing people.



One of the challenges is to translate knowledge into behaviours in the field. By sharing the information that we have & blending it with observation we create a culture where supporter retention gets talked about. We repeat & re-iterate so that key messages become ingrained. Retention becomes part of the organisation's culture.



Retention Cognizant



The data that we have is used in our training & shared with each fundraiser at review meetings where we look at their own results & discuss them.

We create fundraisers who are retention cognizant, i.e. retention is in the back of their mind when they are at work. They have a feel for the age profile of supporters that they have recruited. They can tell you why that occasional younger supporter they have recruited is more likely to be reliable.

We have invested in a data analyst to automate the processes that create these tables & graphs & slides. It also allows us to measure recruitment quality in real-time & predict the impact on long-term income for the charity.

Introducing QIM & ERIC - The next stage in data modelling

One of the key challenges in seeking to improve retention is the time lag. For us looking at retention through 3 payments we typically don't find out how we are doing until at least 5 months after the supporter was recruited.

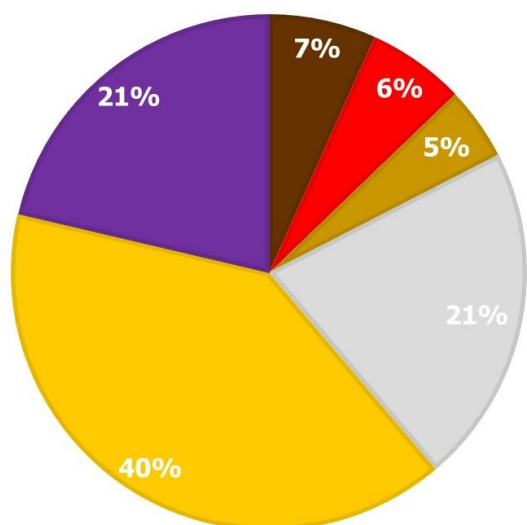
That makes it much harder to gauge performance & adapt fundraiser behaviour to drive improvement. Crude measures such as average age or double ratio are not actually good predictors.



PREDICTIVE ANALYTICS

That is where QIM comes in. QIM uses the same data we have about supporter retention related to ages & donation amount & uses that to predict retention or more specifically to measure the quality of sales Inputs on a weekly & monthly basis. The retention rates % for each of the 28 segments becomes a decimal to multiply actual sales input by.

		R E C R U I T E D	P R E T E N T I O N		R E C R U I T E D	P R E T E N T I O N
SINGLES						
15-19	0.624	0	0.0		0	0
20-24	0.653	1	0.7		0	0
25-29	0.675	2	1.4		0	0
30-34	0.74	3	2.2		0	0
35-39	0.806	3	2.4		0	0
40-44	0.855	3	2.6		1	0.855
45-49	0.865	3	2.6		2	1.73
50-54	0.911	0	0.0		3	2.733
55-59	0.917	0	0.0		2	1.834
60-64	0.933	1	0.9		1	0.933
65-69	0.949	1	0.9		2	1.898
70-74	0.96	1	1.0		1	0.96
75-79	0.958	0	0.0		1	0.958
80+	0.948	0	0.0		1	0.948
TOTAL	SINGLES	18	14.6		14	12.849
			81.4			91.77857
DOUBLES						
15-19	0.46	0	0.0		0	0
20-24	0.487	0	0.0		0	0
25-29	0.552	2	1.1		0	0
30-34	0.588	2	1.2		0	0
35-39	0.682	2	1.4		0	0
40-44	0.727	0	0.0		0	0
45-49	0.775	0	0.0		0	0
50-54	0.869	2	1.7		0	0
55-59	0.881	0	0.0		0	0
60-64	0.889	0	0.0		2	1.778
65-69	0.919	2	1.8		4	3.676
70-74	0.909	2	1.8		2	1.818
75-79	0.921	0	0.0		4	3.684
80+	0.941	0	0.0		4	3.764
TOTAL	DOUBLES	12	9.0		16	14.72
			75.3			92
	ALL	30	23.681		30	27.569
			78.9			91.89667



KEY	
Double Tickets	
<70% retention	
70%+ retention	
80%+ retention	
85%+ retention	
90%+ retention	
95%+ retention	

QIM is our Quality Inputs Monitor. We can use it to more accurately assess the sales of all fundraisers week by week. We can also use it to predict likely retention & to benchmark & analyse the performance of fundraisers or a campaign. It is basically an integrated spreadsheet that auto-generates data & graphs week by week.

Introducing QIM & ERIC - The next stage in data modelling

Extend the model onwards, so you can track retention over several years by each age & amount segment & you have a much more accurate way to model lottery income.

This is ERIC – Expenditure Return on Investment Calculator.

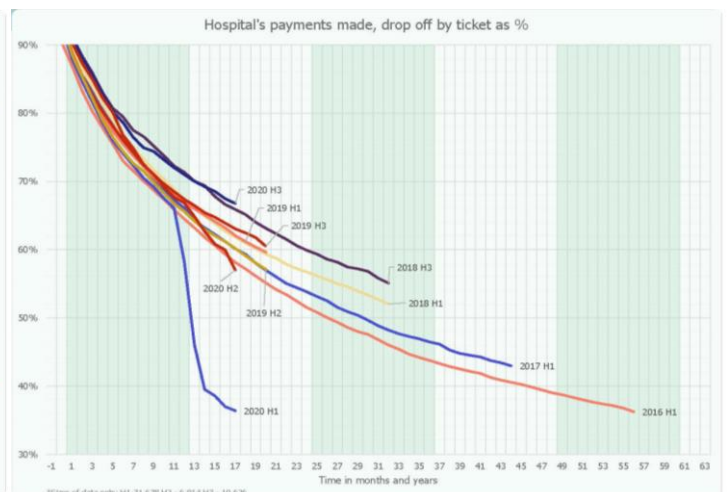


Given that lottery income is all about long-term RoI we want to know as much as possible about it.

We need more accurate ways to calculate the true value of the supporters recruited by an agency & greater insight into how to manage the supporter journey to maximise return.

The strength of a lottery can't be measured just by how many players are in it this week & the value of the work of an agency can't just be measured by the number of lines sold last week.

Everything we have learned shows that the highest quality initial recruitment has a massive impact on the yield from the campaign. It is an example of GOBO- put garbage in & you will get garbage out. A focus on excellence & retention means our charity partners make considerably more money per supporter recruited.





the
fundraising
partnership

Changing the face of face-to-face fundraising

Sustainable fundraising through excellence

www.thefundraisingpartnership.co.uk



Excellence in training... Starts with recruitment



THANK YOU

We received your application!

Thank you for your enquiry about the fundraiser position. Our Talent Acquisition Manager will be in touch with you by phone regarding your enquiry.



Tim - Talent Acquisition Manager



Kevin - Managing Director

Our friendly Talent Acquisition Manager Tim will be in touch with you by phone within 24 hours. He will then arrange a time to discuss the role further.

[Read my bio](#)

Thank you for your enquiry about the fundraiser position, please check out some of our useful videos below that will give you an insight into the role and the company.

[Read my bio](#)



10 things about charity lotteries

[Learn More](#)

Regards
Kevin Mann
Managing Director
The fundraising partnership

Our commitment to learning starts with the recruitment process itself.

Applicants are given videos about the job & the charity & the impact of lotteries.



Let people come & see a fundraiser at work for several hours before they commit to the job.

The observation is a key part of attracting people to a role, that they hadn't previously considered.

Part of their learning process.

An excellent filtering method.



See our values in action

All applicants attend a 2-hour observation, showing their & our commitment to learning, seeing what the job actually involves & seeing our values up close & in practice even before they are appointed.

All applicants are interviewed by 2 different people at different stages & we also get feedback from the person who has conducted the observation.

We start the compliance checks early enough so that no fundraiser starts in the field until right-to-work checks are completed a DBS is obtained, 2 written references are provided & a full CV review.



We provide outstanding training

Our new fundraiser training is comprehensive & exhaustive involving a 12-hour home study video programme & a series of tests totalling 100+ questions.

The 9 modules include professional standards, sensitivity & vulnerability, excellence in retention & also a charity-specific module (in addition to an induction from the charity).

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Hello,

Please see below for a series of links to various modules which you must achieve a pass in order to pass the test overall and be licensed as a fundraiser to go into the field to work. The aim of the test is not to fail people but to help you recall information and to demonstrate that you have achieved the high standards that we look for.

Take your time. All the answers are covered in the training videos and supporting documents. You can re-watch the video and check documents as you do the test.

You may re-take each module test one extra time after completing it to ensure that you pass, or if you wish, to improve your overall results. The higher score will always be used. If you fail to pass after 2 attempts, you will be re-assessed the test and asked to re-sit one final time.

[Click to begin the Company & Personnel National module](#)

[Click to begin the Introduction to the training programme module](#)

[Click to begin the Professional Standards module](#)

[Click to begin the Sensitivity & Vulnerability module](#)

[Click to begin the Understanding the donation module](#)

[Click to begin the Excellence in retention module](#)

[Click to begin the About the charity - Sue Ryder module](#)

[Click to begin the Completing the sales form Sue Ryder module](#)

[Click to begin the Additional Sue Ryder videos module](#)



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Professional Standards Module Test

Professional standards in the field are essential to our success as a company and are a requirement of regulatory bodies as well as our charity partners. The CPC is not only a company policy but also part of your employment terms and conditions.

This module describes the company Code of Professional Conduct section by section. There is a thorough test after the video and this module will take 1 ½ hour to complete. We will also discuss aspects of this policy in the zoom training.

I'm ready!

Training Video



Continue

1 • Professional Standards

1. When is it appropriate to go into a potential supporter's house? *

- A Only if the supporter has a clear mobility issue and invites you in
- B Never unless you want to face disciplinary action and potentially be fired
- C Only if the supporter signs the insurance waiver form
- D Only if the supporter has agreed to sign up and invites you in to complete the form

OK ✓

1 • Professional Standards

2. What should you say if someone asks how long do they have to do it for? *

- A You have to ensure they know that they are making an ongoing commitment, although they can cancel at any point
- B Explain because there is no contract, they are not making an ongoing commitment
- C Tell them that after a year they will be asked to set it up again if they wish to continue
- D Tell them that they have to do it for at least 3 months or you won't get paid

OK ✓

Fundraisers also complete a step-by-step guide to using the sales form & complete practice sign-ups & an extra rehearsal sign-up role play during a final zoom session.

This zoom session also recaps & reiterates key messages around professional conduct & vulnerability using scenarios & exercises.

Charity partners can be sent or sit in all or any part of the course at any time.

"I have done so much sales training in my career, but the TFP training was by far the best I'd ever done."

"Very comprehensive & very clear."

"I even enjoyed doing the tests!"

Excellent Field training & support

All fundraisers are closely supervised & supported across their 1st 2 weeks with us.

We use development coaches to support & encourage & to check everything last thing is done correctly over the 1st 2 days. For every new fundraiser this is a special moment with a heady mix of excitement & anxiety.

We then blend return visits with phone calls & supporter calls to ensure that every new fundraiser is a credit to the charity & to give every person a full opportunity to learn the craft of face-to-face fundraising.



The support continues & we operate a high-contact model of field management – typically we speak to each fundraiser several times each day. Mostly its just keeping people happy & reducing the isolation of lone working –

*"You may be working on your own,
But you should never feel alone."*

We also provide continual feedback from supporters who have completed the survey & from comments on verification calls. We commit to continual positive feedback



**Help people reach their full potential.
Catch them doing something right.**

- Ken Blanchard



Excellence runs through everything that we do like the lettering in a stick of rock.

We achieved the ISO 9001 standard within a few months of being established showing how building a quality framework was a priority from the outset.

It took a strong leadership commitment to excellence to choose to devote time to this at a time when there was so much else to do.

We use the ISO principles to drive our approach including a continual search for improvement, an evidence-led approach & a commitment to collaboration to bring learning & insight into the company.

We use the lessons learned tools to ensure that we improve even as a result of mistakes!

Our partnership model ensures we deliver outstanding relationship management for our clients.



Engagement of people



Leadership



Improvement



Relationship Management



Customer focus



Process approach

Evidence based decision-making



ISO 9001 : 2015 REGISTERED

Certificate No:373602021

COMPLIANCE



CHARITY COMMISSION
FOR ENGLAND AND WALES



Registered with
FUNDRAISING
REGULATOR



Chartered
Institute of
Fundraising

GAMBLING
COMMISSION


Compliance is a passion for us not a chore & we treat the minimum standards of regulatory bodies as only the foundation for excellence in ethical fundraising & professional conduct. Wherever we can we innovate to go much further than the minimum requirements

All the requirements are fully met & exceeded by our policies & practices.

It is the combination of policies, training & accountability that delivers excellence.

This means very, very few complaints for you to have to deal with & we always handle any issues thoroughly.





Policies

Policies are the foundation that underpins standards & drives excellence.

We have all the required policies that any charity partner could want.

That includes data protection but also equality & diversity, environmental impact & money laundering & modern slavery.

Two of the most important are the Code Of Professional Conduct & the Sensitivity & Vulnerable Person policy.

These really govern all aspects of how fundraisers behave & cover all compliance requirements. They are covered thoroughly in the training programme & tested, & they are also part of the employment contract for every fundraiser.

Appendix 2a



Code of Professional Conduct

Detailed codes of practices and policies to be followed and adhered to.

Revision date 07/05/2021

Appendix 2b



Sensitivity & Vulnerable Persons Policy

Detailed codes of practices and policies to be followed and adhered to.

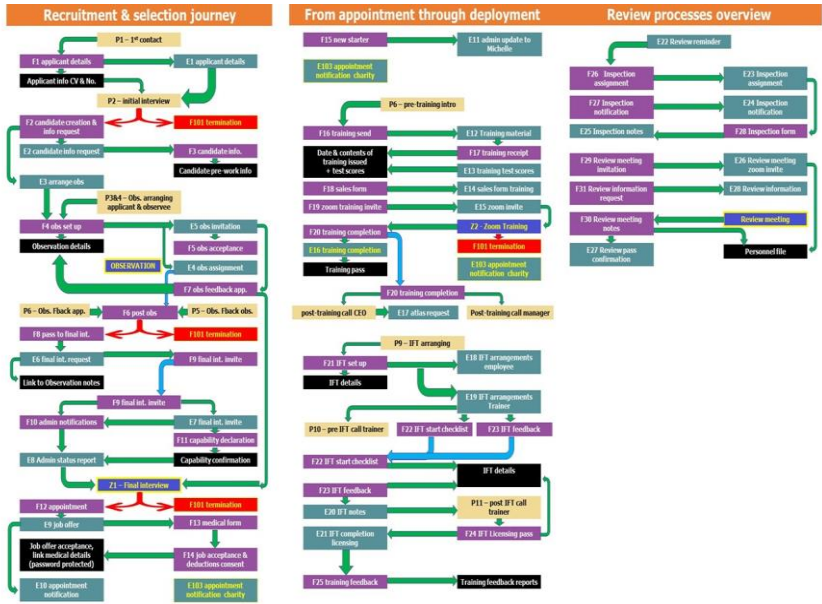
POLICIES & PROCEDURES

Policies need to be backed up by robust procedures. We process map our business-critical policies & processes & have full business continuity plans.



A good example of this is the recruitment, selection & training journey for fundraisers.

We have devoted considerable time to mapping out this process, reviewing & refining it & using smart software like typeform & zappier to ensure that we provide a great candidate experience.



RecruitmentProcess	Search	Filter	Sort	Page											
New applicants															
ID	Ben	Phone	Location	Application date	Status	CV	DOB	Open/used	Source	Reference	SES	Agree to test	Progress	Deal	Unlocks
1	Ben	+150147 0227	Chapel	Sep 11, 2018	Yes			Open	Referral			Yes	25%	Application completed	Unlocks
2	Ben	+150147 0227	Cambridge	Sep 20, 2018	Yes			Used	Referral			Yes	25%	Application completed	Unlocks
All Observation Day															
ID	Ben	Phone	Location	Application date	Status	CV	DOB	Open/used	Source	Reference	SES	Agree to test	Progress	Deal	Unlocks
1	Ben	0120396133	Cambridge	4/24	Yes			Used	Referral	Working in IT	Manager 1	Yes	45%	CV	Application completed
Post Obs Pre Appointment															
ID	Ben	Phone	Location	Application date	Status	CV	DOB	Open/used	Source	Reference	SES	Agree to test	Progress	Deal	Unlocks
1	Ben	0120396133	Beaulieu	Apr 1, 2020	Yes			Used	Referral	Working in IT	Manager 1	Yes	45%	CV	Application completed

We also need to complete all of the required administration such as right to work & DBS checks & dispatch of equipment, clothing etc. before anyone starts in the field.

Our process & the dashboard help us stay on top of this & deliver to our standards. Our charity partners need to have confidence that our internal systems are robust & fit for purpose.



Sensitivity & Vulnerability



Sensitivity & Vulnerability are key compliance & reputational concerns for charities regarding face-to-face fundraising. We have translated all requirements & guidance into our policies & a specific training module.



TREATING DONORS FAIRLY FUNDRAISING WITH PEOPLE IN VULNERABLE CIRCUMSTANCES

Excellent fundraising for a better world

Appendix 2b



Sensitivity & Vulnerable Persons Policy

Detailed codes of practices and policies to be followed and adhered to.

Revision date 07/05/2021

The conversational sales style we use is all about seeking consent to talk & getting engagement in order to assess vulnerability. We don't pitch "at" people or use "selling tricks".

We specifically train people not just how to detect vulnerability but how to leave non-supporters positively & how to walk away from a potential sale. We require fundraisers to have positive verification of the 3 Ms (below) within each conversation.



CAPACITY TO MAKE THE DECISION



CAUSE AFFINITY & MOTIVATION



MEANS TO PAY



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Changing the face of face-to-face fundraising