

# Working with external agencies



(These photos were taken a very long time ago!)

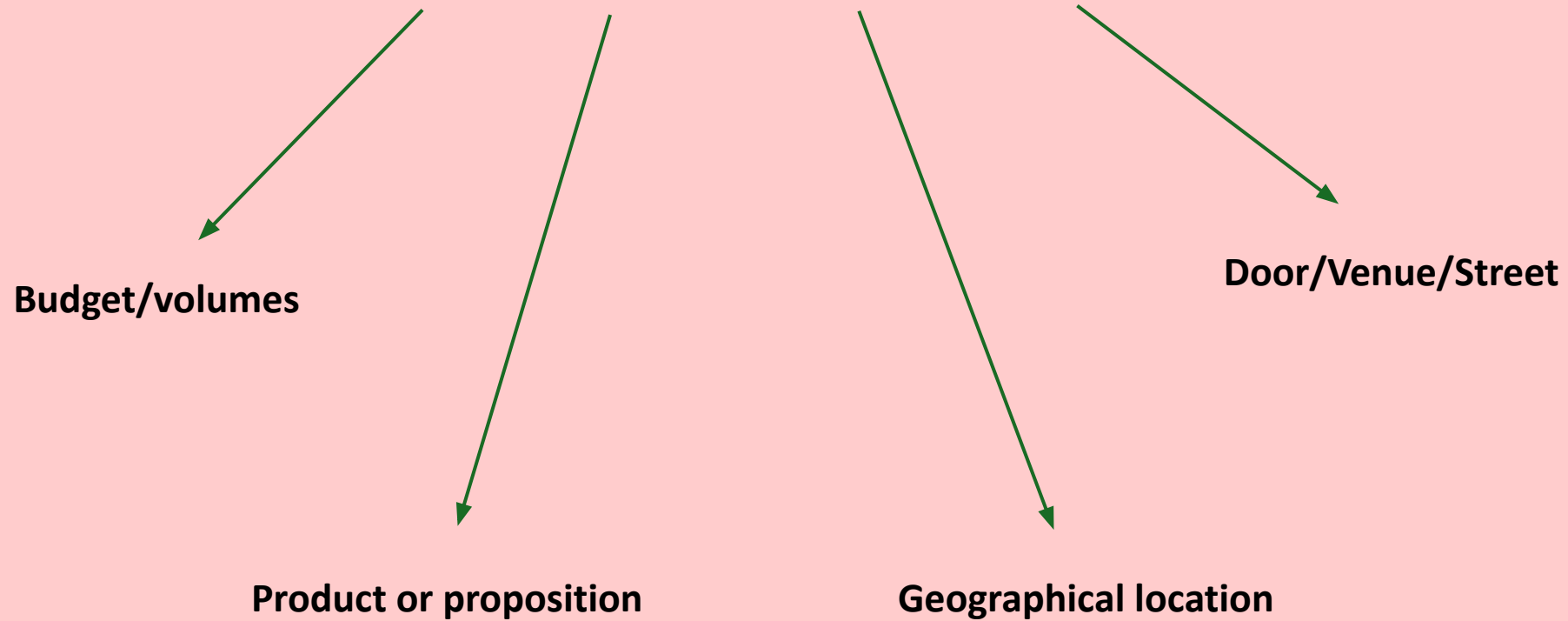
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Board Trustee – Showcase of Fundraising Innovation and Inspiration

Governance Committee Member – Data & Marketing Association

# Tendering for a F2F agency



**..be prepared to engage with agencies pre-tender..**

(and don't forget to ensure you're asking all the same questions when you do!)

**Email invite only:**

**2 responses**

**Pre-engaged:**

**12 responses**



**What's important to  
your charity?**

# Ensuring you've got all the information!

Typical tender questions cover payment models, cost per acquisition, policies..

..But what are you buying and does the agency align with your values and what you'd consider to be best practice?

Topic	Scoring	Prompts
Sites		What 'type' of sites are used? How does agency ensure reaching the right audience?
Welcome calling		In-house or subcontracted? What due diligence is done? Can we access call recordings?
Training		How long is new starter training? 1 day/2 days? Can we have input? Easy access to shadow this?
Refresher training		How often is this done? Are their audit logs? Do they have specific modules for troubleshooting?
Charity training		Can we deliver at our site? How often would we be required? Can we do quarterly refresher training?
Subcontracting		Is the fundraising subcontracted? Will we have right to remove subcontractor?
Subcontracting		What accountability do the subcontractor have to the agency? How do agency ensure standards?

**Sharing is caring!**

**Reach out to other charities with active F2F  
programmes for their tips!**

# Do your due diligence

## References

- Ask for references to be provided
- Reach out and have a chat.. Ideally to the person that manages the campaign day to day!
- Reach out to other clients too.

## Agency culture

- Does this align with your charity's values?
- Would you feel confident putting them in front of your trustees?

## Training

- Shadow training delivery.
- For subcontractors, shadow a few and compare notes.

## Policies

- Request their policies
- Are they compliant? In line with your charities ethics and values? Do they align with your internal policies?

## Mystery shop

- Experience their fundraisers as a supporter would
- Request a full site list to ensure it's truly a mystery!
- For door-to-door you can ask to shadow

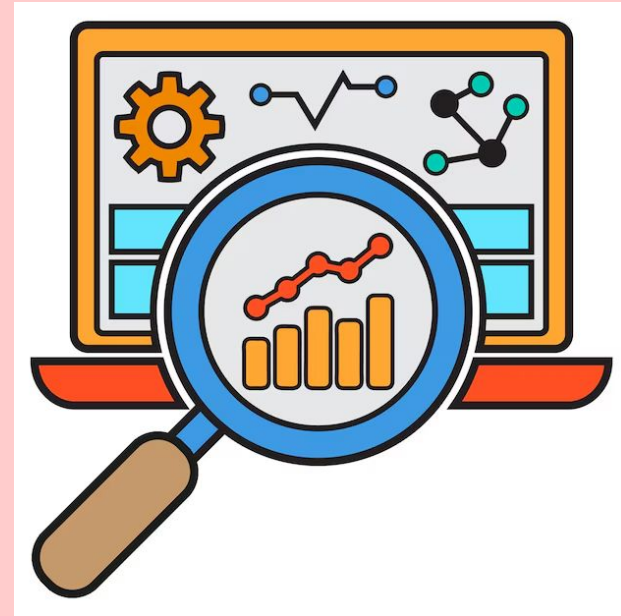
## Test and split the risk!



# Contracts and set up



Contractual agreements should reflect the standards you have been promised and seen to date!



Be clever with your set up processes. If possible, using separate source codes in the data so you can optimise your campaign.

# Plan out your on-going quality assurance

**Mystery shopping** – External via agency and engaging internal staff

**Welcome call listening** – Access all calls to pick out at random, or cherry pick following incident

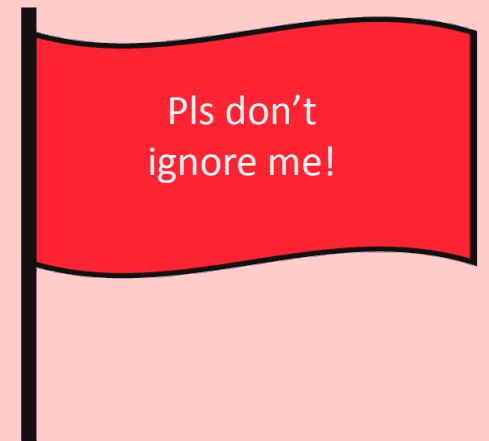
**Shadowing in the field** – Ask to see specific teams, newer fundraisers, established fundraisers

**Site booking audits** – If needed provide template wording to ensure compliance

**Shadowing training** – With all subcontractors, both new starter training and charity training (if they deliver this)

**Decide on what is reasonable and proportionate in terms of frequency and how to report and feedback on this..**

**..And if any issues identified how the agency plan resolve them, including timescales and audit trails.**





# Get fundraisers engaged and involved!

The best fundraisers out there inspire people to support; they have memorable conversations and engage people with your cause.

**Passion and enthusiasm are infectious!**



OR





# Get your charity engaged and involved!

**As we know, there's no sitting on the fence when it comes to face-to-face fundraisers, so dispel the myths and champion your campaign!**

Invite staff to  
mystery shop  
fundraisers

Bring a fundraiser  
along to a trustee  
meeting

Invite leadership  
to shadow  
fundraisers

Utilise stand  
space at your  
own events  
(..and ask for a discounted  
CPA!)

Bring frontline  
staff into training  
sessions to talk  
about their work

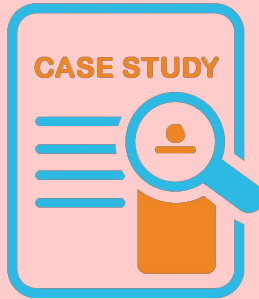
Share feedback  
about the  
fundraisers

Share 'good news'  
stories. You can even  
ask your fundraisers  
to contribute!

Leverage  
corporate  
relationships

# Charity training

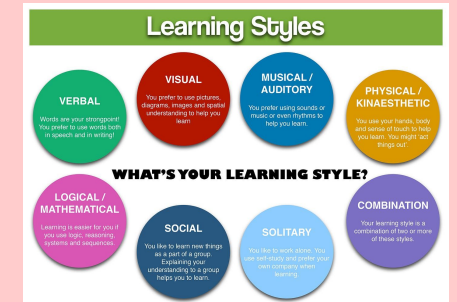
## Informative



## Engaging



## Accessible



## Refresher training



## Train the trainer



**Don't forget breaks..** 70% of people can't focus on one task for more than 20 minutes. (Harvard Business Review)  
And if it's in person, fundraisers always appreciate snacks!

## Now keep them engaged and involved!



As fundraisers, we know saying 'Thank you' goes a long way!



Keep them in the loop, what's going on, interesting case studies, new projects, use seed lists!



Always ask for feedback and ask them for their ideas! They are the people engaging with your supporters day in day out!

## A fundraisers idea..



# ..and the REAL difference the robotic animals made to my campaign

## **Fundraisers felt valued.**

Fundraisers seeing that a charity had taken their idea, listened and made it happen makes them know they are valued. Fundraiser that are well engaged with your charity, will naturally want to do the best by your cause. Many of the best performing fundraisers will have sway over what charity they represent, and I want them representing mine!

## **Engagement at shows increased.**

This improved supporter experience and opened them up for conversation. People started approaching the stand themselves made this a lower risk of attracting complaints. It made the experience more memorable.

## **Sign up rates at shows increased.**

Why would this matter if I pay a cost per acquisition? Because from the data I knew that the supporters acquired at shows have lower attrition and higher lifetime value, by doing this it's made shows what can be very costly (for the agency) far more cost effective for them, its win-win.

# Any questions?

Feel free to add me on LinkedIn or email me if you have any further questions!  
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