

■ The white paper

You spoke. We listened.

We believe there is a better way forward for face-to-face fundraising.

Now, let's make it so.

www.irregulargiving.me

The
Irregular Giving
Project

Housekeeping

- Please stay on mute whilst others are speaking
- If you think of questions, please type them in the chat box
- Please raise your hand to speak during the discussion section



The purpose of today's webinar

- Thank you
- Clarify the intentions behind the Irregular Giving Project
- Deliver the top-level findings
- Deliver our key recommendations
- Conduct a Q&A
- Identify next steps

Thank you

160 local and international Stakeholders

Ally Murray, Jenny Kearney, Ruth Wicks and **Tom Duggan** for webinar facilitation

Fiona McPhee and the **IVE Group** for data support

Karl Tischler and **Mark Anscombe** for Manifesto design and inspiration

Henri Muniz and **Public Outreach** for the fundraiser surveys



Short-sightedness of individual parties will negatively impact everyone

A collective approach is vital to address and solve the problems

Some acknowledgements

- Primarily anecdotal
- All parties have biases
- Experiences are not universal
- A launching off point
- Further research is essential

The purpose of this project *is not*

- × to 'blame' any specific party
- × to simply air grievances
- × to 'bash' F2F fundraising

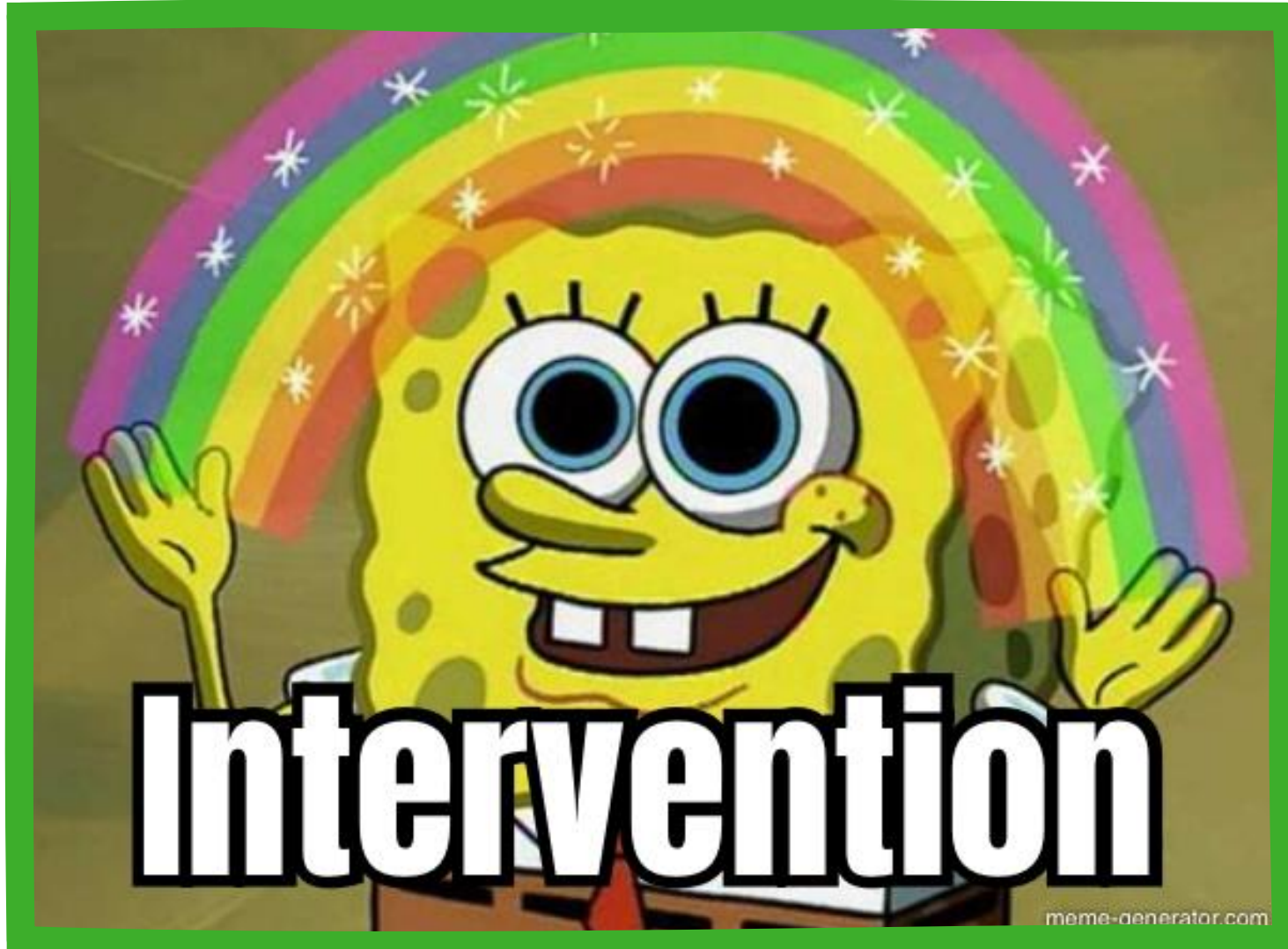


The purpose of this project *is*

- ✓ to open up conversation and challenge the status quo
- ✓ to identify problems in order to solve them
- ✓ to provide a supportive foundation for positive change
- ✓ to foster collaboration and understanding



Think of this as a friendly...



Some things need not return to 'normal' — some things were well and truly broken before.

This is our chance to fix that.

Here is where we start...

- **We are passionate fundraisers** who inspire donors to make long-term connections with causes they love.
- **We are proud advocates** of face to face fundraising.
- **Every donor has chosen** to make a personal connection with our cause – we will treat them as passionate individuals, not as numbers on a spreadsheet.
- **Honesty and integrity** are more important to us than expediency and profit.

- **Everyone involved in face-to-face** fundraising is responsible for upholding these values.

**We believe there is
a better way forward for
face-to-face fundraising.**

Now, let's make it so.

Systemic vs symptomatic

Systemic issues

The underlying disease suffered by the “patient”. Curing the disease is difficult due to complicated underlying factors.

Solutions are usually “top down” and harder to achieve. However, if these solutions are implemented, they are longer-lasting.

Symptomatic issues

The outward signs that the patient has a disease. Treating the symptoms may offer short term relief but it will not solve the underlying problem – and the symptoms will always return.

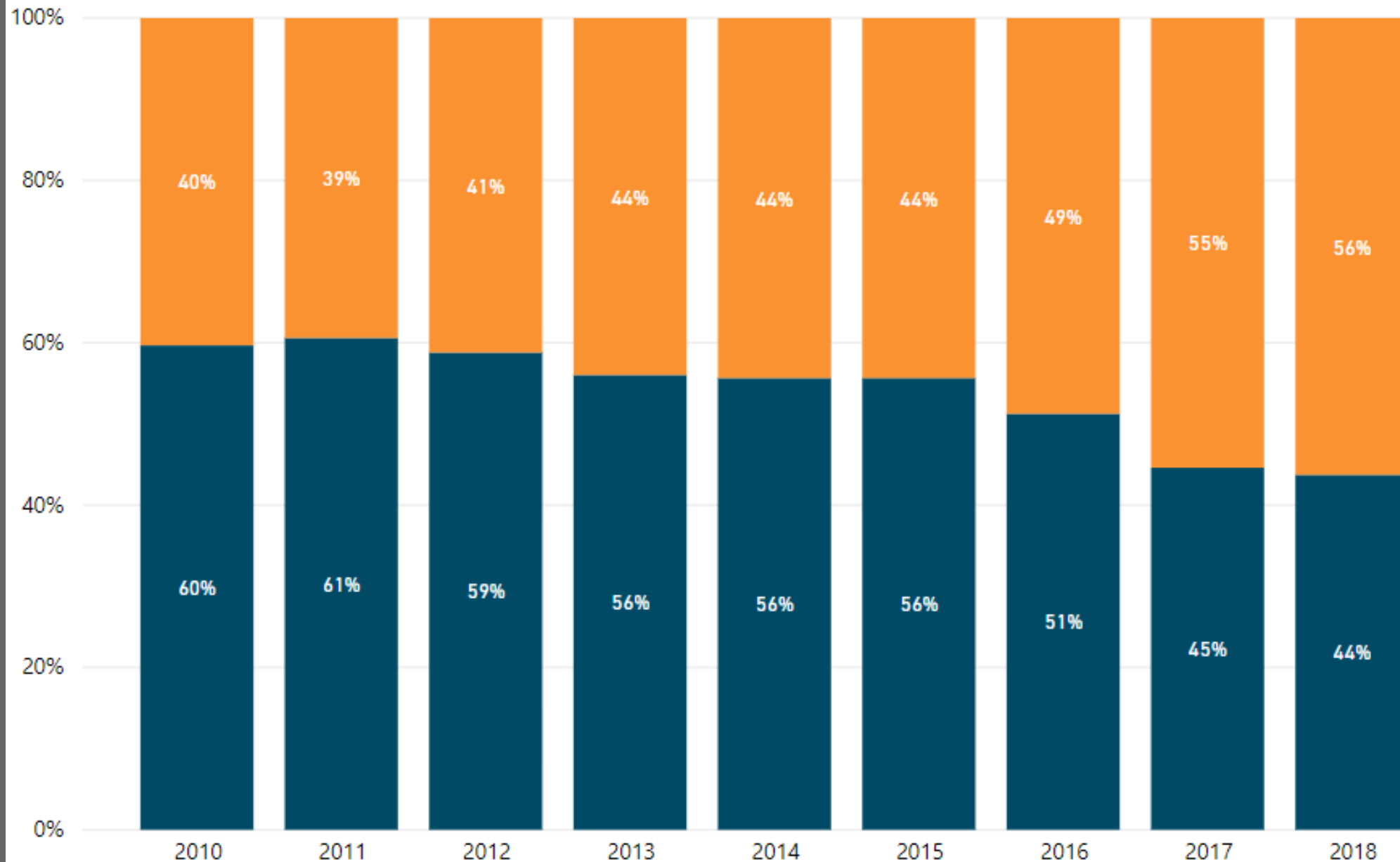
Solutions are usually “bottom up”, easier to achieve but usually temporary.

Key findings

1. A genuine threat to face to face fundraising viability
2. A major cause is the expectation of constant growth
3. Charities need to re-apply their values
4. Outsourcing to sub-contractors seems to be accelerating negative trends
5. We lack a common process to measure rising attrition
6. A clear requirement for sector-wide action
7. It's not just face to face fundraising

Regular Giving Acquisition & Retention

● Retained ● Yr 1 Lapsed

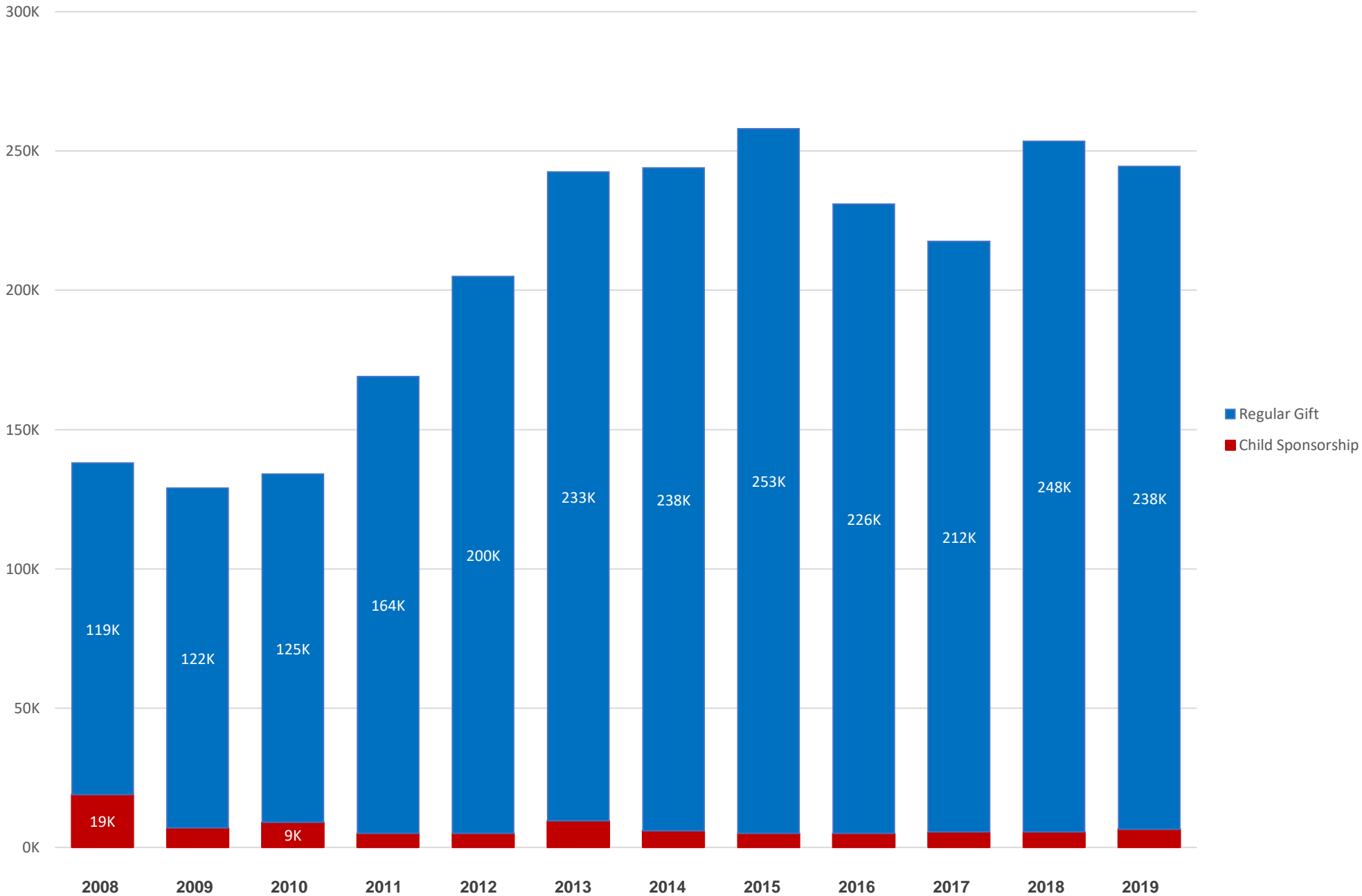


**Donor
Retention
is Falling**

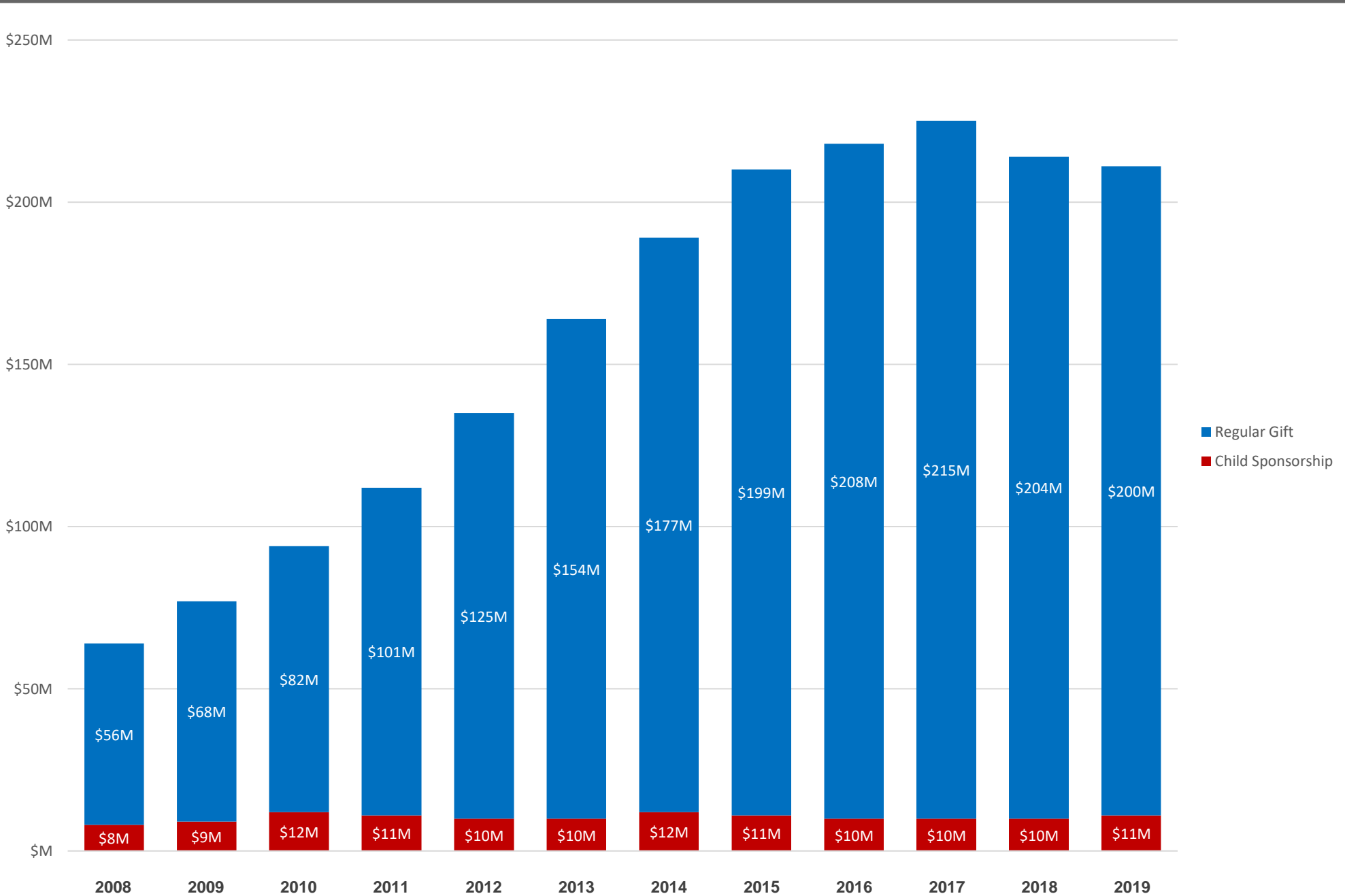
Source IVE Group

Total Recruits by Gift Type

**Recruitment
is declining
and income
is falling**



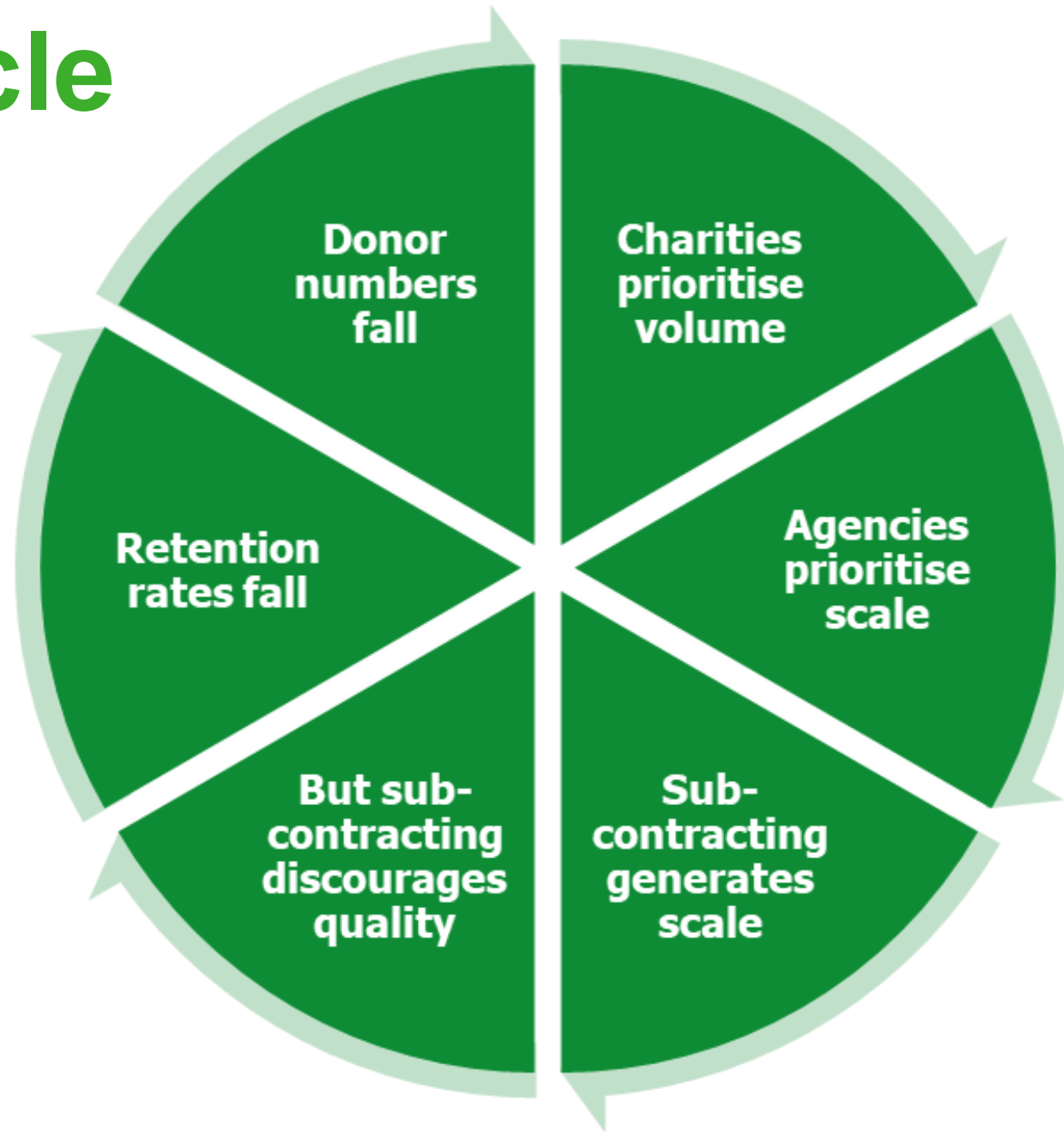
Income by Year and Gift Type



**Recruitment
is declining
and income
is falling**

Vicious cycle

The quest for numbers at the cost of quality creates a vicious cycle



Q&A

15 minutes to discuss:

The Manifesto

Key findings

IVE data

Vicious cycle

Building blocks of the report

Values, strategy, and knowledge

Business models

Attrition and processes

In the field

WARNING

Top line recommendations!

Please be prepared to take notes and discuss in the Q&A that follows this section.

Top line recommendations

- 1. Convening a forum of charity fundraising directors** to act as a permanent forum for discussion of sector wide issues

Top line recommendations

2. Adoption by the sector of the manifesto for the values of face to face fundraising

Top line recommendations

- 3. A review including a gap analysis of training & professional development resources**
available to fundraisers working in regular giving and face to face fundraising

Top line recommendations

- 4. A research project to assess best practice in face to face fundraising in global markets and follow up to engage with Australia and New Zealand practitioners and share findings**

Top line recommendations

- 5. Establishment of minimum benchmarks for the quality of outsourcing due diligence** to be incorporated into charity and agency accreditation. A consistent standard of due diligence will create a more level playing field for suppliers doing the right thing

Top line recommendations

6. Sector-wide collaboration to develop a standard attrition reporting process & vocab.

Noting the complexity of this task, this should be as simple as possible in providing a useful output for use by all members

Top line recommendations

- 7. Consideration should be given to the development of a sector-wide qualification for face to face fundraisers incorporating core skills and providing a nationally accredited and transportable qualification**

Top line recommendations

8. All parties should review the traditional split of training between charities & agencies.

Charities may wish to consider applying greater scrutiny to the “sales” training provided by suppliers to ensure that this is consistent with their values and goals

Top line recommendations

- 9. A sector-wide discussion process to discuss alternative business models and generate inspiration and promote innovation**

Top line recommendations

- 10. A benchmarking process for reporting agency & potentially sub-contractor attrition levels to allow charities to make informed decisions about outsourcing face to face fundraising**

Top line recommendations

- 11. A sector-wide discussion process to review the history of inhouse fundraising and assess its effectiveness given the current market environment. Subsequently, the results of this review to be shared with all organisations interested in this model**

Discussion

Split into three rooms for 15 minutes to discuss:

Key recommendations



- 1** Convening a forum of charity fundraising directors to act as a permanent forum for discussion of sector wide issues.
- 2** Adoption by the sector of the manifesto for the values of face to face fundraising.
- 3** A review including a gap analysis of training & professional development resources available to fundraisers working in regular giving and face to face fundraising.
- 4** A research project to assess best practice in face to face fundraising in global markets and follow up to engage with Australia and New Zealand practitioners and share findings.
- 5** Establishment of minimum benchmarks for the quality of outsourcing due diligence to be incorporated into charity and agency accreditation. A consistent standard of due diligence will create a more level playing field for suppliers doing the right thing.
- 6** Sector-wide collaboration to develop a standard attrition reporting process & vocab. Noting the complexity of this task, this should be as simple as possible in providing a useful output for use by all members.

- 7** Consideration should be given to the development of a sector-wide qualification for face to face fundraisers incorporating core skills and providing a nationally accredited and transportable qualification.
- 8** All parties should review the traditional split of training between charities & agencies. Charities may wish to consider applying greater scrutiny to the “sales” training provided by suppliers to ensure that this is consistent with their values and goals
- 9** A sector-wide discussion process to discuss alternative business models and generate inspiration and promote innovation.
- 10** A benchmarking process for reporting agency & potentially sub-contractor attrition levels to allow charities to make informed decisions about outsourcing face to face fundraising.
- 11** A sector-wide discussion process to review the history of inhouse fundraising and assess its effectiveness given the current market environment. Subsequently, the results of this review to be shared with all organisations interested in this model.

Welcome
back



- Telephone fundraising is becoming increasingly relied upon
- Face some of the same challenges as face to face fundraising
- Challenges should be identified ‘regular giving’ not just ‘face to face’
- Irregular Giving Project will open discussion around telephone fundraising



Next steps

We will email you a welcome pack

You will complete a short survey

You will print the manifesto and put it up in your office

We will run discussion groups to talk about collaborations

We are happy to organise one-on-one chats with **You**

Keep the conversation moving

- 1) Recommend a friend or colleague to register at www.irregulargiving.me
- 2) Get involved on the [Facebook Group](#)

Your feedback

- We will email a survey to gather feedback
- Which of the following recommendations would you/your organisation be interested in supporting?
 - top-line recommendations
 - other recommendations (from white paper)
 - new recommendations not listed

Fundraising Partners Consultancy

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Thank you

Think about what we've discussed

Decide what you want to support


Arrange a 1-2-1 with us

OR

Stay on the call and enter the open table discussion

The **Irregular Giving** Project

www.irregulargiving.me

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 **Fundraising Partners**
C O N S U L T A N C Y