


# The **Irregular Giving** Project

[www.irregulargiving.me](http://www.irregulargiving.me)

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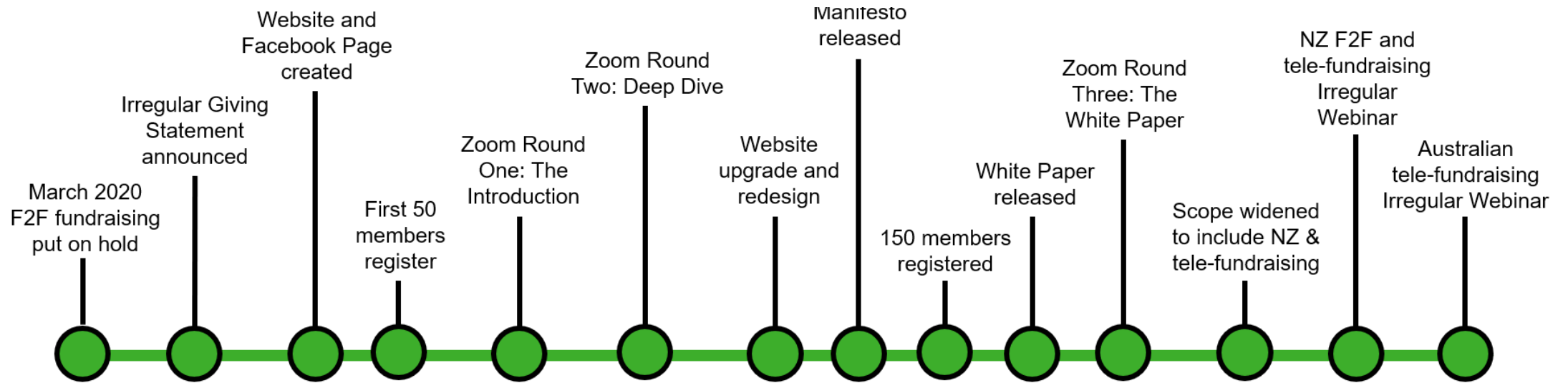
# Agenda

- Background of the Irregular Giving Project
- Key findings
- Benchmarking data
- Goals for today
- Session One
- 5 minute break
- Session Two
- Thank you and next steps

# Why the Irregular Giving Project?

- Growing concerns about the state of face to face fundraising in Australia
- COVID-19 provided an 'irregular' moment in time to reflect, reconsider and re-imagine
- We believe there is a better way forward for F2F
- The Irregular Giving Project is the vehicle we are using to gather support

# The story so far ...



**We believe there is  
a better way forward for  
regular giving fundraising.  
Now, let's make it so.**

The  
**Irregular Giving**  
Project

# Key findings

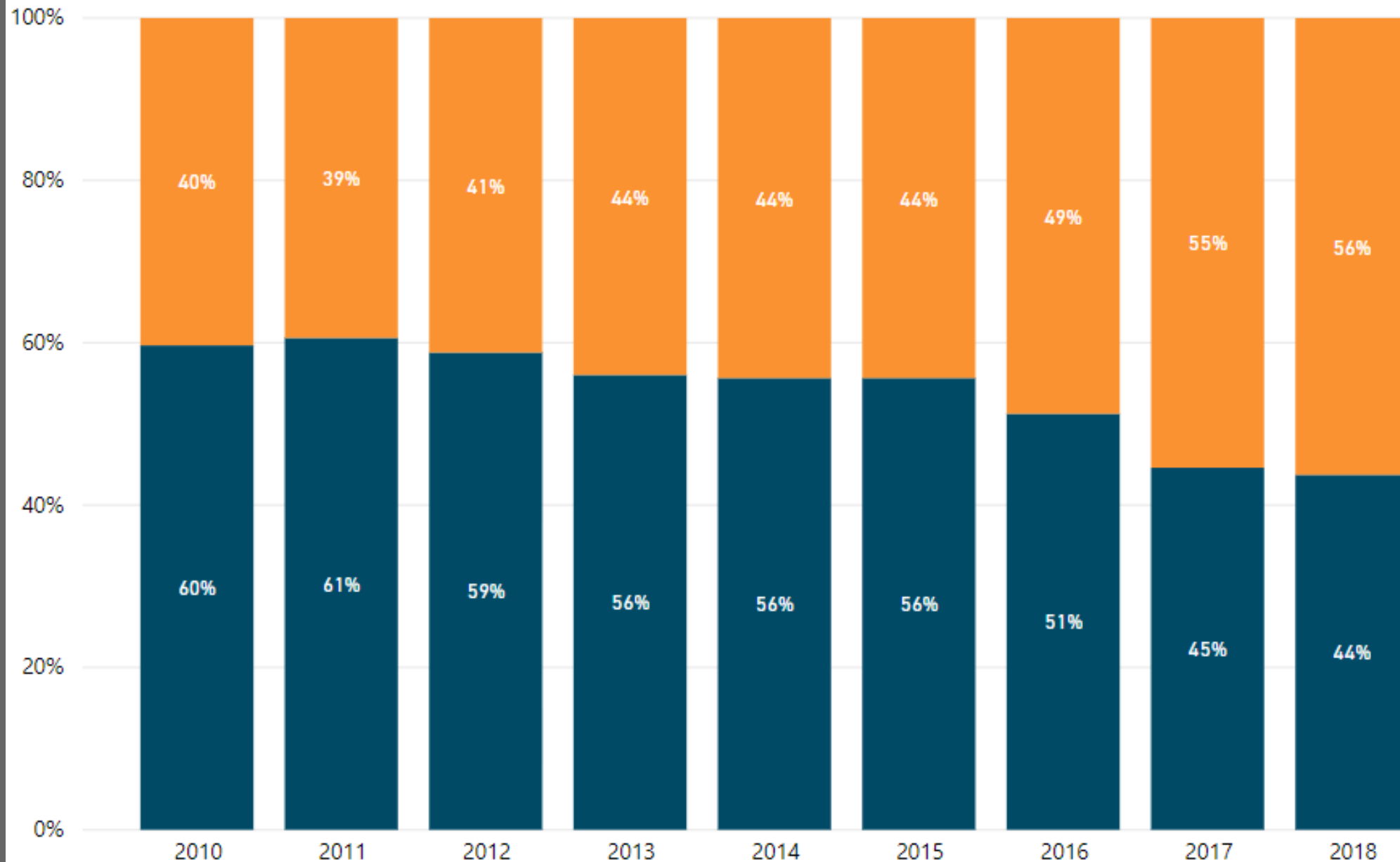
1. A genuine threat to face to face fundraising viability
2. A major cause is the expectation of constant growth
3. Charities need to re-apply their values
4. Outsourcing to sub-contractors seems to be accelerating negative trends
5. We lack a common process to measure rising attrition
6. A clear requirement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

- Telephone fundraising is becoming increasingly relied upon
- RG acquisition via phone faces some of the same challenges as face to face fundraising
- Challenges should be identified as 'regular giving' not just 'face to face'
- Irregular Giving Project will open discussion around telephone fundraising (RG acquisition)



## Regular Giving Acquisition & Retention

● Retained ● Yr 1 Lapsed



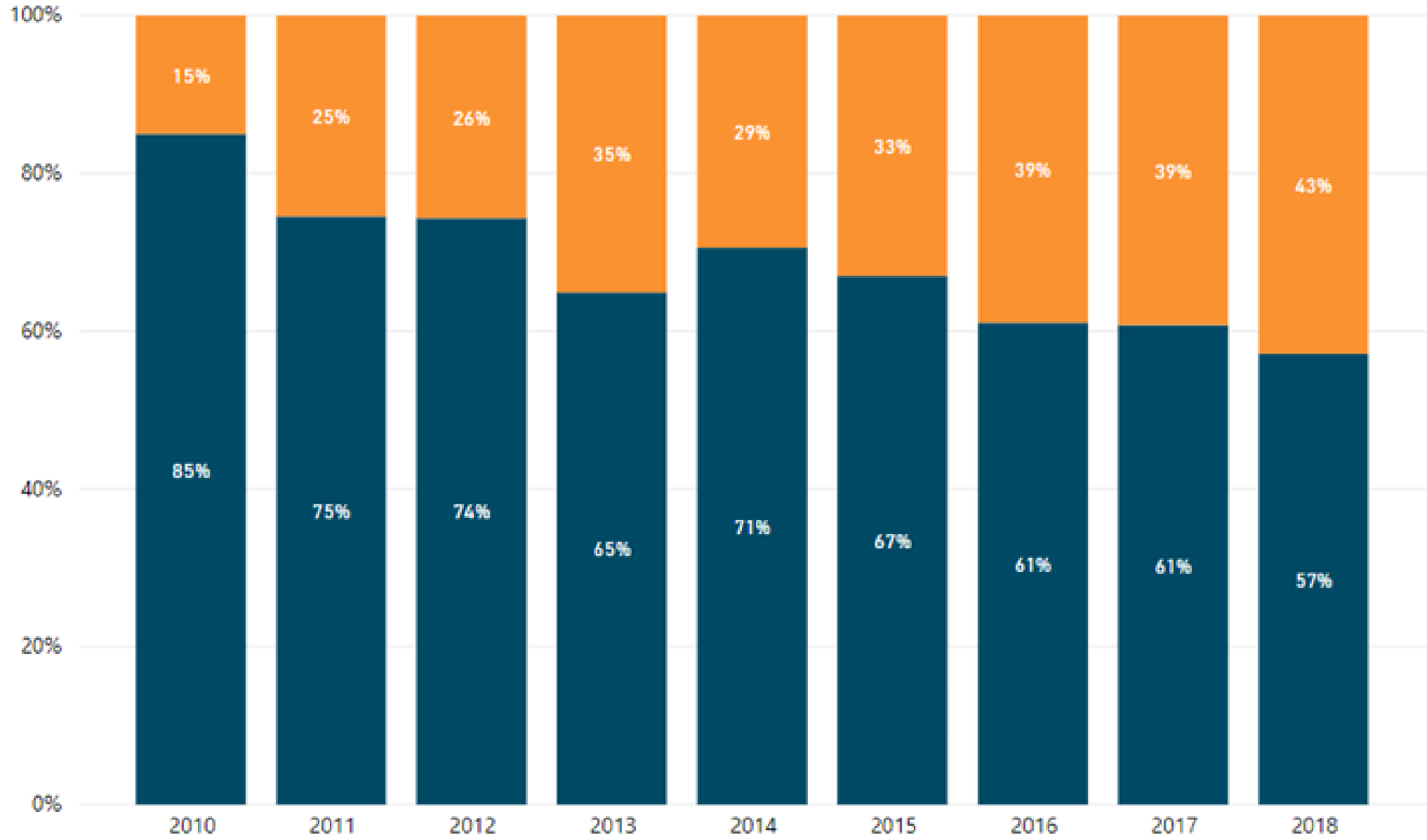
**F2F Donor  
Retention  
Falling in  
Australia**

Source IVE Group

# Regular Giving Acquisition & Retention



● Retained ● Yr 1 Lapsed



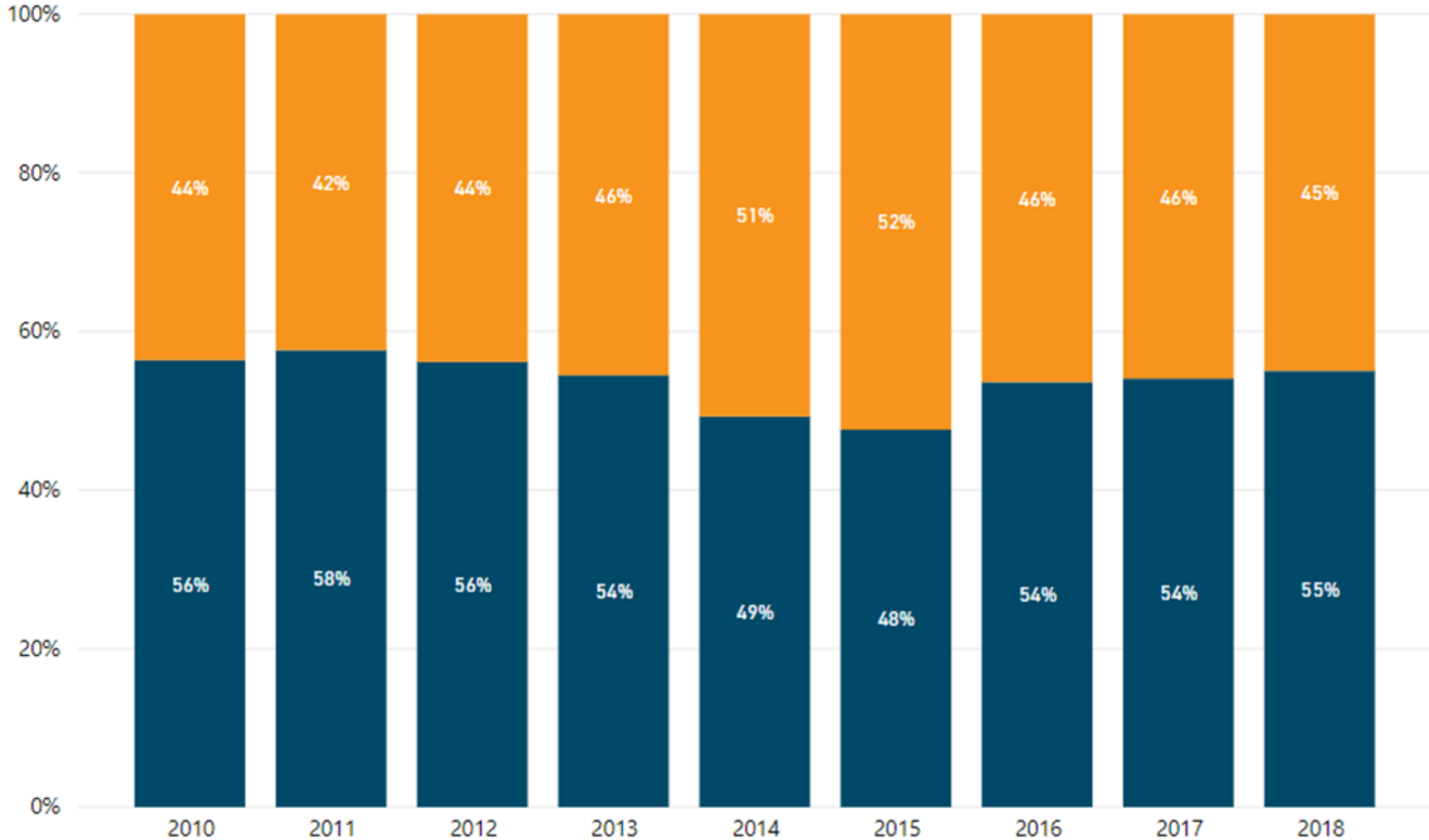
## Phone Donor Retention Falling in Australia

Source IVE Group



## Regular Giving Acquisition & Retention

● Retained ● Yr 1 Lapsed

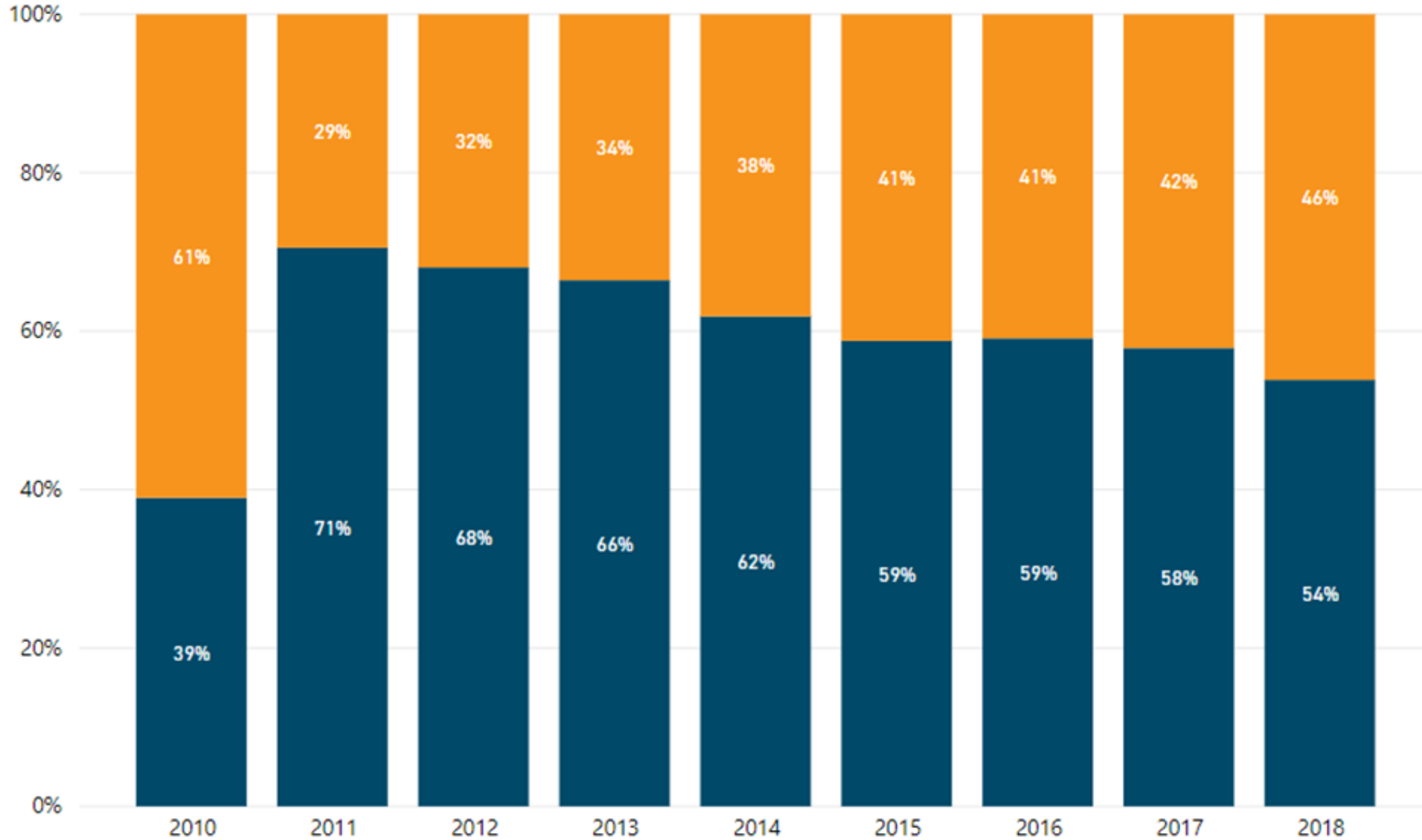


**F2F Donor Retention is Steady in New Zealand**

Source IVE Group

## Regular Giving Acquisition & Retention

● Retained ● Yr 1 Lapsed



**Phone Donor Retention is Falling in New Zealand**

# Initial observations

- Phone RG retention is often ignored – primary focus on pledge rates
- Drivers of phone RG retention have not been well researched
- Unclear lines of ‘responsibility’ between data providers and phone agencies
- Potential concerns about data privacy that may soon become the focus of regulators

# Goal for today's session

- The webinar today brings together more than 30 people from charities, agencies and consultancies in Australia and New Zealand
- Thanks to everyone for your time!
- There is a lot we could address and we can't cover it all. We've picked key questions to discuss in key areas.
- Our aim is to pool as many ideas as possible to help move the conversation along.
- The end goal is to identify the key issues at play and make recommendations to address these issues.

# Thanks to our amazing facilitators!

- **Tori Burns**, Plan International Australia
- **Tom Duggan CFRE**, Plan International Australia

# Session One:

## A) Outsourcing – Suppliers, Partnership and Business Models

*Facilitated by ...*

- Do the current tele-fundraising billing/business models support positive outcomes in terms of regular giving donor acquisition and quality?
- Are there alternative tele-fundraising billing/business models that might be worth trialling?
- Could the partnerships between charities and suppliers be improved to support higher-quality fundraising? If so, how?
- Could compliance and due diligence in respect to tele-fundraising be improved? If so, how?

# Session One:

## B) Data – Sources, Regulation and Quality

*Facilitated by ...*

- To what extent is data quality responsible for donor quality?
- What are the biggest challenges in respect to data currently?
- Is there a need for greater regulation and transparency in respect to data sourcing? If so, what actions could be taken?

# Session One in Progress



# 5 minute break

# Session Two:

## A) On the Phone - Fundraising

*Facilitated by ...*

- What is the single biggest issue with quality control in telephone fundraising?
- What is a major issue facing telephone fundraiser recruitment and how might this be addressed?
- How might telephone fundraisers be better trained and managed on the drivers of donor quality and retention?
- How might the industry better support the professional development of our phone fundraisers?

# Session Two:

## B) Retention – Management and Drivers

*Facilitated by ...*

- What gaps are widely present in retention measurement/reporting and how might these be addressed?
- Is there appropriate feedback between charities and fundraising agencies/data suppliers regarding donor retention? If not, why not?
- How might donor stewardship be improved to support better outcomes?

# Session Two in Progress

# Thanks and next steps

## Next steps:

1. We will circulate a summary of the outcomes from today as well as these slides
2. We'll continue the discussion on the Irregular Giving Project [Facebook group](#) – join if you haven't yet and get your colleagues involved
3. We will follow up with a top-line report regarding the key issues and recommendations

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