



Quality Management System Toolkit, Part 1

QMS Intro & Step 1 - Universal Standards

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Introduction

This toolkit series aims to support senior fundraising managers to facilitate the launch, integration, or optimization of a Quality Management System [QMS] in our F2F operations. The toolkit series is packed with info, guides, processes, and templates and supports the IG and F2F strategies 22-25 with our new Ways of Working, being more audience focused (IG strategy) and Culture & Process focused (F2F Strategy).

Integration requires reviewing your current systems and processes and adjusting where necessary to get different outcomes in areas such as training and performance management. We want to optimize current practices.

The QMS is about quality management, but as you start the integration journey, you will see it is primarily about supporting fundraisers to help them access their full potential, which, in turn, will help them deliver the best possible results for children in every conversation. Therefore, all your work to integrate the QMS will support developing higher-performing UNICEF F2F Fundraisers.

Furthermore, at its core, the QMS is a tool that helps to consistently fulfil the F2F vision;

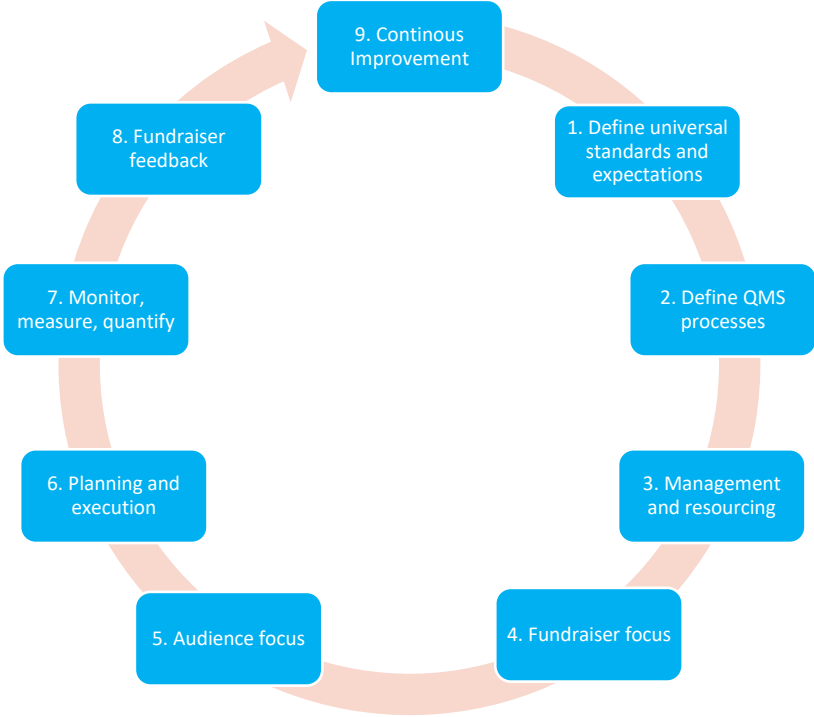
We will change the world for children. UNICEF: Excellence in all fields - where EVERY conversation matters.

UNICEF F2F Quality Management System

Quality Management System

For UNICEF, the customer is the donor, so we need to establish a business process for F2F that focuses consistently on meeting the needs of our audience and enhancing their satisfaction with our donor experience that also aligns with IG and F2F strategic direction.

UNICEF F2F QMS: 9 Step Loop



The QMS is a 9-step cyclical and continuous process.

Step	Component	Goal
1	Define universal standards and expectations	Standards and expectations to manage fundraisers' quality are established so they can be trained, then measured
2	Define QMS processes	Quality control systems and processes are defined to measure the success of training and how the fundraisers interact with UNICEF donors and comply with the universal set of standards and expectations
3	Management and resourcing	To establish precise resourcing needs and management responsibilities to manage the QMS system and desired outcomes
4	Fundraiser focus	These Steps help deliver on the IG strategy. The QMS is focused on the two main drivers to improving quality; improving fundraiser performance and enhancing how the UNICEF audience reacts to F2F dialogues by consistently reviewing quality control templates and
5	Audience focus	

		processes to ensure quality control processes target improvements in skills and knowledge for individuals and the campaign
6	Planning and execution	To capture the qualitative feedback in a positive, practical, and valuable manner to drive quality improvements
7	Monitor, measure, quantify	To quantify quality and set KPIs to fundraisers for them to improve their skills and knowledge and monitor their progress in these categories over time
8	Fundraiser feedback	To deliver helpful feedback to fundraisers to give them the tools to improve the donor experience, which will positively drive changes in F2F quality
9	Continuous improvement	The system drives continual improvement by optimizing performance in F2F components that drive F2F quality

QMS & IG + F2F Strategy 22-25

QMS integration aligns with many critical areas of the IG Strategy 22-25 and F2F Global Strategy 22-25.

Individual Giving Strategy 22-25

In summary, the Individual Giving Strategy will revolve around these three building blocks:

- i. A digital-first approach to Individual Giving;
- ii. Audience-centricity;
- iii. Driving diversification, quality, and value

One of the main drivers of quality is the donor experience. For F2F, there is a strong argument that there is no other way as powerful to engage supporters, but each interaction must be memorable, and that is about audience centricity. F2F teams have some of the finest interactions with our supporters. F2F can deliver an amazing donor experience but this all depends on the skills of the fundraiser.

Value is measured in terms of increased revenue and the value donors are receiving from their experience with a UNICEF fundraiser. It is therefore imperative we do our best to manage and monitor the UNICEF F2F experience, truly understand the quality of these interactions and make every conversation matter.

A QMS helps deliver on these audience and value deliverables. The quality control processes we want you to integrate will give you a methodology and techniques to manage and monitor the fundraising skills required to fulfill the strategy and enhance the donor experience.

Global F2F Strategy 22-25

The strategy states that 'to ensure the channel can continue to deliver sustainable revenue, a review and sharpening of the programme is required.'¹ The IG Strategy states F2F needs to move away from a growth channel because 'historically our focus has almost exclusively been on growing and optimising acquisition through the (F2F) channel' which has 'in many situations invited fundraisers to focus on volume in growth metrics rather than quality and sustainable long-term net revenue.'²

A QMS is a key component to optimize and revolutionize our 'quality focused KPIs' to deliver on the main F2F strategic goal in this period 'to improve retention in the first 12 months of a Face to Face recruited pledge donor's life where attrition and value loss for UNICEF is highest.'³

¹ Global Face to Face Strategy 2022-2025, Pg. 3

² Global Face to Face Strategy 2022-2025, Pg. 3

³ Global Face to Face Strategy 2022-2025, Pg. 3

Strategic Skills Summary

Integrating the QMS is a keystone project for your market to help you on your journey to deliver on our strategic responsibilities for the strategic period 22-25. There are new technical skills for F2F we will need to test, learn, and adjust in our operations to ensure F2F can adapt and thrive.

The table below lists the various strategic responsibilities found in the IG Strategy and the Global F2F documents and shows what QMS Step will help deliver on the listed strategic need.

Strategic need	QMS Step to deliver on strategy
SWOT weakness: 'Inconsistent evaluating and monitoring - Risk of missed opportunities and areas for improvement and potential limitations compared to other channels.' ⁴	Step 7 - Monitor, Measure, Quantify
SWOT weakness: 'Poor quality control in many markets - Risk of poor supporter experiences, reputational risk, impact on survival rates and ROI.' ⁵	Step 1 - Universal Standards and Expectations Step 2 - QMS Testing Processes
SWOT weakness: 'Lack of recognition of the value of the fundraiser - Risk of high fundraiser turnover results in poor supporter experiences, reduced capacity, and increased training and recruitment costs.' ⁶	Step 8 - Fundraiser Feedback
SWOT threats: 'F2F is a 'fast-evolving market' and is now 'no longer a channel you can purely invest money and expect quality donors' so there is a 'need for more resource and expertise than ever before.' ⁷	Step 3 - Management and Resourcing Step 6 – Planning and Execution
F2F vision; We will change the world for children through the vision UNICEF: Excellence in all fields - where EVERY conversation matters. ⁸	Step 4 - Fundraiser Focus Step 5 - Audience Focus
Working with agencies gives you access to large volumes but limited control of their programme and fundraisers. Less control over training, fundraiser recruitment, quality control, audience targeting, complaint management & KPI's. ⁹	Step 7 - Monitor, Measure, Quantify Step 8 - Fundraiser Feedback
High quality, consistency, collaboration, and inspiration are the four pillars which the training programme needs to be founded upon. ¹⁰	Step 9 – Continuous Improvement
The F2F refrain, maintain, optimize, revolutionize is a foundational way of working for our F2F operations in delivering each of the four strategic themes. ¹¹	Step 9 – Continuous Improvement
Over the next IG strategic period we should be looking to 'develop attractive value propositions based on audiences, their affiliations, aspirations, time of life and choices' ¹²	Step 9 – Continuous Improvement Step 2 - QMS QC Processes

⁴ Global Face to Face Strategy 2022-2025, Pg. 4

⁵ Global Face to Face Strategy 2022-2025, Pg. 4

⁶ Global Face to Face Strategy 2022-2025, Pg. 4

⁷ Global Face to Face Strategy 2022-2025, Pg. 5

⁸ Global Face to Face Strategy 2022-2025, Pg. 5

⁹ Global Face to Face Strategy 2022-2025, Pg. 8

¹⁰ Global Face to Face Strategy 2022-2025, Pg. 15

¹¹ Global Face to Face Strategy 2022-2025, Pg. 17

¹² Individual Giving - 2022-25 Oct3 2021, pg. 20

	<p>Skills to be developed and training and subsequently tested in the AES and FSI templates: <i>Value driving, Content switch Product selection.</i></p> <p>These new skills can drive open asking, age-appropriate asks, and offering different products for different audience segments to get the best value. F2F is likely the best channel to dialogue with donors to agree a level that works for them</p>
<p>The IG strategy urges us to move towards some harder work and more technical skills and ‘an audience proposition versus the easy work of an ask based on a channel.’¹³</p>	<p>Step 1 – Continuous Improvement Step 3 - QMS Testing Processes</p> <p>Skills to be developed and training and subsequently tested in the AES and FSI templates: <i>Audience filtering, Proposition ask</i></p> <p>These new skills can drive improved qualification and categorization at the start of the script, so a donor can select their content by interest or the fundraiser determines by age, affiliations, aspirations, time of life.</p>
<p>With this Strategy we seek to expand that focus and look holistically across the entire Face to Face journey; From quality in acquisition to LTV (Long term value) and the entire donor journey / experience¹⁴</p>	<p>Step 1 – Continuous Improvement Step 3 - QMS Testing Processes Step 6 - Audience Focus</p> <p>Skills required and subsequently tested in the AES and FSI templates: <i>Donor journey script</i></p> <p>The Code requires close monitoring and testing of data protection and a consent script.</p>
<p>Opportunity to improve retention and feedback loops to fundraisers for more aware and aligned fundraisers to improve conversations¹⁵</p>	<p>Step 9 - Fundraiser Feedback</p>
<p>Opportunity to improve content management as a broader scope of knowledge increases the donor experience and improves quality KPIs¹⁶</p>	<p>Step 1 – Continuous Improvement Step 3 - QMS Testing Processes</p> <p>Content selection skill - [multiple options to pitch from multiple key program areas]</p> <p>Content management [by managers] to vastly increase the quality of content delivered to fundraisers to equip them to deliver the audience approach matching content to defined audience segmentation</p>

¹³ Individual Giving - 2022-25 Oct3 2021, pg. 20
¹⁴ Global Face to Face Strategy 2022-2025, Pg. 17
¹⁵ Big F2F Survey Webinar 2022, slide 49
¹⁶ Big F2F Survey Webinar 2022, slide 49

QMS Integration Pre-Steps

To kickstart the QMS integration, this Toolkit includes some pre-step exercises for you to complete to help begin your integration journey and adjust the QMS to your local market conditions. Completing the pre-steps will allow you to find your starting position to know what you are currently doing, what is missing, and what you need to address with a training plan.

The pre-steps are to help adjust the templates included in this toolkit so that you can begin quality control processes with your fundraisers testing them on what they have been training on and what they are expected to know in your market. The pre-steps help build a system per market that only tests what is trained. Then, the templates can be expanded as further training is completed.

Pre-Step	Component	Goal	Resource
0	Resourcing	Create a QMS integration task force from your F2F Team to kickstart the process and have your key senior F2F employees involved from the start to learn the QMS 9 Steps	N/A
1	Complete training audit	<ul style="list-style-type: none"> - To map out current practice in your market against the universal standards set out in the QMS - To allow markets to review, edit and make a decision on any QMS components to best fit local market conditions 	QMS Training Map + Templates (2 tabs) <ul style="list-style-type: none"> - Tr. Map1 (Code-Pro-Strat) - Tr. Map 2 (Skills)
2	Training log	<ul style="list-style-type: none"> - Use the Training Log or another system to track any training needs when reviewing Step 2: Universal Standards and Expectations 	QMS Training Map + Templates (1 tab) <ul style="list-style-type: none"> - Training Log
3	Score QMS Integration	<ul style="list-style-type: none"> - Use the scoring column (1 for Yes, 0 for No) to mark if you currently train the specific skill, behavior, compliance need, or piece of knowledge - Review total scores for Code, Guidance and Strategy - Review total scores for Skills - Review total scores for each Knowledge tab - Use the results of this step to help build the training plan in Step 9 	QMS Training Map + Templates
4	Edit Templates to local market conditions	<ul style="list-style-type: none"> - Review template Checkpoints - Review template Checkpoint items - Delete or add per local market conditions - Ensure checkpoints are re-numbered correctly - Ensure checkpoint items are re-numbered correctly 	QMS Training Map + Templates (12 tabs) <ul style="list-style-type: none"> - AES Template - FSI Template - KB1-10 Templates
5	Edit Templates to local market; i) compliance, ii) good practice, and iii) excellence	<ul style="list-style-type: none"> - Review checkpoints - Review checkpoint items - Delete - add per local market conditions - Ensure checkpoints are re-numbered correctly - Ensure checkpoint items are numbered correctly 	QMS Training Map + Templates (12 tabs) <ul style="list-style-type: none"> - AES Template - FSI Template - KB1-10 Templates
6	Agora Code training module	<ul style="list-style-type: none"> - All FR's, in-house and agency, to complete the Agora training 	Code, Guidance, Values

7	Create a source document for local market approved F2F content	<ul style="list-style-type: none"> - Complete CP content as a minimum in the '<i>UNICEF Dialogue Knowledge Manual</i>' 	UNICEF Dialogue Knowledge Management Manual [Template]
8	Create a training plan	<ul style="list-style-type: none"> - Using the results of the QMS integration scoring create a training plan to cover the compliance (CP) items required to train fundraisers - Work towards building a Fundraiser Training Journey that puts all the good practice (GP) and excellence (EX) training needs on a timeline from their onboarding through the opening months of their employment 	QMS Training Map + Templates

Step 1: Universal Standards and Expectations

<p>Introduction</p>	<p>The two documents in this toolkit that deliver the universal standards and expectations are the UNICEF Guidance on Face-to-Face Fundraising and the Global F2F Code of Conduct.</p> <p>Defining the standards and expectations was a long and detailed process of researching all available UNICEF and non-UNICEF F2F regulation documents and methods. Feedback was widespread across UNICEF F2F and non-F2F stakeholders, ensuring no standard or expectation was missed.</p>
<p>Goal</p>	<p>The content in both documents applies to both in-house and agencies and will help F2F Teams understand the expectations and actions required to deliver F2F Fundraising to UNICEF standards. The values and principles include current UNICEF and F2F values.</p>
<p>Outcome</p>	<p>Global F2F Code of Conduct</p> <p>The Code identifies unified agreed compliance principles and good practices around acceptable fundraising behaviours and removes current inconsistencies between markets. It captures existing good practices across National Committees and Country Offices from various self-regulatory F2F governing bodies. It encapsulates the good practice components of an optimized F2F operation that can operate with a low risk to UNICEF while delivering good quality donors to UNICEF.</p> <p>UNICEF Guidance on Face-to-Face Fundraising</p> <p>The Guidance defines the recommended processes and standards to plan, develop, train, and monitor F2F Fundraising. The Guidance is designed to mitigate the risk of fundraisers communicating with donors without sufficient knowledge or skills and requires markets to monitor compliance with local processes and the Code.</p>
<p>Process</p>	<p>13 Pillars</p> <p>The Code of Conduct has 13 Pillars grouping the compliance items for a UNICEF F2F operation. A fundraiser needs to be trained and understand each of the Pillars. The quality control processes in the QMS treat these as baseline compliance needs, meaning after onboarding and induction, a fundraiser for UNICEF should know all 13 Pillars.</p> <p>Values (Interaction Pillars), F2F Principles</p> <p>The Values (Interaction Pillars) and F2F Principles are how the Code opens because their content is fundamental to help guide the behaviour and actions of a UNICEF F2F Fundraiser. Values and principles help a F2F Fundraiser to deliver excellent dialogues every time. Fundraisers who live the Values and Principles daily can give the donor experience that only F2F can provide.</p>

Guidance, Section 9

The main content that the QMS focuses on in the Guidance is Section 9. Section 9 details the knowledge a fundraiser should know once they have completed their initial training. The requirements here call for a methodological way of managing knowledge.

9. Prior to commencing fundraising work, all F2F Fundraisers:

9.1.1 Complete mandatory training identified by PFP's Individual Giving team, including:

9.1.2. F2F Fundraising and the F2F Code of Conduct and this guidance;

9.1.3. Child safeguarding;

9.1.4. Ethics and integrity at UNICEF.

9.1.5. Prevention of Sexual Exploitation and Abuse (PSEA)

9.1.6. Information Security and Data Privacy training

9.1.7. Fraud awareness F2F fundraisers

9.1.8. Are able to explain the key concepts identified in Annex 2 to donors regarding: UNICEF, the use of pledge or one-time donations, the fact that they are paid, and data privacy.

Section 9 formalizes the knowledge needs for a F2F Fundraiser, but it has expanded them and put a timing on when a Fundraiser needs to gain this knowledge. Annex 2 states a fundraiser need to be retrained on the Code every three months. Therefore, we recommend consistently refreshing all the knowledge needs in Section 9. The QC processes in the Toolkit give you a way to test this knowledge.

The Global F2F Team heavily supports delivering Agora training to help facilitate the needs defined in Section 9. The new Code of Conduct training supports kickstarting the integration of the QMS. Of note, 9.1.4, 9.1.5, and 9.1.6 will be additional F2F Agora modules customized for F2F Fundraisers' needs and released later. More knowledge needs will emerge as F2F and operational needs evolve, and when they do, they will be added to Section 9.

Annex 2: Information Disclosure

The content in [Annex 2](#) ensures fundraisers can talk about important concepts when they emerge in a dialogue. The concepts relate to how they are paid, the Code of Conduct and how it is trained regularly, the complaints process, where to go online, how the funds are used, and how data is stored and used. Your current training materials may or may not cover the list in Annex 2.

<p>Guidance</p>	<p>Training</p> <p>The Code defines the rules and regulations a fundraiser must abide by to represent UNICEF, so fundraisers need to know and be refreshed on these standards. In addition, the Guidance defines knowledge needs that must be trained to Fundraisers before or within their induction period.</p> <p>Training must match what is being tested to facilitate an effective QMS process. If the training journey covers all the needs, then a fundraiser has been given the tools to deliver the best possible donor experience, and it then becomes possible to manage them on this.</p> <p>Training Map Audit</p> <p>An essential step before beginning to test any QC processes defined in Step 3 is to map where your current training practice is versus the needs captured in the universal standards and guidance documents. The QC Templates also contain exemplar skill sets that support delivering an optimized donor experience, and you can map your current skills training to these exemplar skill sets.</p> <p>Build a picture of your existing training using the training map in the QMS Training Map + Template spreadsheet.</p> <p>Training Plan</p> <p>By completing the process, you will see any missing components, and you can start to build a training plan, the outcome of which is to ensure all your current fundraisers are trained on all QMS needs. In addition, a training plan ensures all new fundraisers receive training that aligns with QMS needs so they can thrive in QC processes.</p>
<p>Tips</p>	<p>Agora Training</p> <p>Due to the increased knowledge required, a longer time frame will need to be applied to a fundraiser learning journey. Likely, most agencies will not want to have their fundraisers spending three or four hours doing UNICEF courses in addition to initial fundraiser training.</p> <p>As a minimum, the Code and Fraud are a must for week one. Child safeguarding can be completed within the first month. Markets can place other required training in a custom timeline building a learning journey that works for your market and in-house and agency teams.</p>
<p>Resource</p>	<p>Universal Standards Documentation Global F2F Code of Conduct UNICEF Guidance on Face-to-Face Fundraising F2F Values and Principles</p> <p>Agora Training Code, Guidance, Values</p>

[Fraud awareness for Face-to-Face Fundraisers](#)

[Child safeguarding for face-to-face fundraisers](#)

[Guidance Note on the Use of Social Media](#)

Global Training Toolkits

[Global Training Tool Kit - Technical Trainings](#)

[Global Training Tool Kit - Thematic Trainings](#)

Annex

Consent Script

“We are asking for your personal data for us to process your pledge to keep you informed via emails and messages of how UNICEF is using your support to drive results for children. It will never be shared outside of UNICEF. Can I get your consent to collect your personal details so we can sign you up for this gift?”

Either the donor says yes or no here. If yes, the fundraiser must note that the donor gave consent in your pledge capture process, which is stored in the CRM attached to the donor’s pledge file. If the donor says no, the fundraiser must politely exit the dialogue without completing the pledge and respect the donors’ data privacy wishes.

Follow up options script

The donor must get the contact details of the donor care team that handles the F2F pledge file, a regular practice. What is a new component is fundraisers must now tell donors where they can find further information and privacy policies (e.g., website privacy policy) and where their data is stored, so they understand how to access that data.

Toolkit Feedback

To help us improve both the QMS and this Toolkit, please fill out this [quick feedback form](#) which will take approximately 4 minutes to complete.

Help us to understand:

- What works?
- What does not work or needs more work?
- What did you learn?
- What did we miss?
- +
- What are your ideas to improve the QMS and this Toolkit?