



Quality Management System Toolkit, Part 2

Step 2 - QMS Processes

Executive Summary

QMS Toolkit Part 2 highlights and details the quality management processes a market needs to operationalize and then optimize to manage the integration of a quality management system.

QMS processes detail the two principal quality control processes that can accurately measure a fundraiser's performance and get us closer to managing the audience experience. In addition, the integration of these quality control processes helps F2F operations deliver on their strategic accountabilities detailed in QMS Toolkit Part 1, Universal Standards.

QMS Toolkit Part 2 also details how to support the quality control processes with optimized systems to manage knowledge and skills. In simple terms, training knowledge and skills is the starting point for testing knowledge and skills in a quality control process. A systematic focus on fundraiser knowledge and skills will impact the fundraisers' ability to deliver an optimized audience experience for UNICEF.

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Step 2: QMS Processes

Introduction	The QMS contains two quality control processes; Fundraiser Support Interview (FSI) and Audience Experience Score (AES) (more commonly known as Mystery Shopping).														
Goal	To establish the systems and processes required for a QMS to function and deliver qualitative feedback to fundraisers.														
Outcome	To bring clarity to what skills and knowledge to train, test, and manage that drive quality performance. To define what a fundraiser needs to know to be compliant to the Code. To define what is F2F good practice and F2F excellence to help fundraisers develop their skills and knowledge to be able to deliver the best donor experience possible every time.														
Process	To review, customize, test, and select one or both QC processes to integrate into your F2F operations. For example, AES is a covert process designed to happen to the fundraiser without their knowledge versus an FSI that is overt and happens to a fundraiser with their knowledge.														
Requirement	<ol style="list-style-type: none"> i. Decide on a QC process to test that best fits your market needs ii. Work towards building a regularized calendar year that contains: <ul style="list-style-type: none"> - An FSI for a minimum of 10% of fundraisers two or three times a year - An AES for a minimum of 10% of fundraisers two or three times a year iii. All fundraisers must be made aware (in initial training) that AES, FSI, including video mystery shopping are part of the job description, and there must be mandatory acceptance of this process to work as a fundraiser 														
Guidance	<p>QMS Training Map + Template</p> <ul style="list-style-type: none"> - The QMS Training Map + Template spreadsheet is the primary document to use to help integrate and adjust the recommendations here into a QMS system that works in your specific market - Use one spreadsheet as a source to map training needs to dissect which components make up F2F quality <table border="1" data-bbox="391 1312 1419 1822"> <thead> <tr> <th>Tab</th> <th>Objective</th> </tr> </thead> <tbody> <tr> <td>Training Log</td> <td>A place to capture training needs discovered when working through the Toolkit</td> </tr> <tr> <td>Tr. Map1 (Code-Pro-Strat)</td> <td>The tab to map current training practice versus training needs for the Code, Guidance, and F2F Strategy</td> </tr> <tr> <td>Tr. Map2 (Skills)</td> <td>The tab to map current training practice versus training needs for defined Skills that deliver quality dialogues</td> </tr> <tr> <td>KB1 through to KB10 Templates</td> <td>Ten template tabs populated with suggested questions and answers to facilitate the knowledge testing part of the FSI to ensure fundraisers have the knowledge defined in the Guidance, Section 9</td> </tr> <tr> <td>AES Template</td> <td>Audience Experience Score Template for you to copy, refine, and customize to your local market needs</td> </tr> <tr> <td>FSI Template</td> <td>Fundraiser Support Interview Template for you to copy, refine, and customize to your local market needs</td> </tr> </tbody> </table>	Tab	Objective	Training Log	A place to capture training needs discovered when working through the Toolkit	Tr. Map1 (Code-Pro-Strat)	The tab to map current training practice versus training needs for the Code, Guidance, and F2F Strategy	Tr. Map2 (Skills)	The tab to map current training practice versus training needs for defined Skills that deliver quality dialogues	KB1 through to KB10 Templates	Ten template tabs populated with suggested questions and answers to facilitate the knowledge testing part of the FSI to ensure fundraisers have the knowledge defined in the Guidance, Section 9	AES Template	Audience Experience Score Template for you to copy, refine, and customize to your local market needs	FSI Template	Fundraiser Support Interview Template for you to copy, refine, and customize to your local market needs
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Testing Processes

Process	Guidelines
Compliance (CP), Good Practice (GP) Excellence (EX)	To optimize performance by understanding what areas need to be improved. The QMS helps you capture data on three main components of a fundraiser's performance: Compliance (CP), Good Practice (GP), and Excellence (EX). Fundraisers need to understand CP, GP, and EX metrics to maintain good scores or know what areas to improve to increase their overall score. QMS templates will help you share these metrics with fundraisers.
QC Template Checkpoints	<ul style="list-style-type: none"> - These are a group set of behaviors that make up a skill, e.g., Stopping or asking. - The minimum number of checkpoints are the CP behaviors - Each Checkpoint is colour coded to match CP, GP, or EX - Depending on local market needs, the colour code of the checkpoint can be changed - GP Checkpoints can be removed or added to speed up a visit - EX Checkpoints can be removed or added to speed up a visit
QC Template Checkpoint Items	<ul style="list-style-type: none"> - These are individual behaviors or actions that belong to a skill set, e.g., 'smiling and waving' in the Stopping Checkpoint - Like adding and removing entire Checkpoints, the same can be done for individual Checkpoint Items within the Checkpoints, which can be edited, removed, or added - Checkpoint Item content describing the behaviour can be edited to local market conditions and local good practice - Checkpoint Item content describing the objective of the behaviour can be edited to local market conditions and local good practice
Knowledge Blocks (KB)	A grouped block of similarly themed knowledge to help with the fundraiser training journey. For example, one knowledge block groups knowledge of the Code, Guidance, and F2F Fundraising
Knowledge Sets (KS)	A specific set of knowledge is required within a knowledge block. For example, knowledge of the Code is a set of knowledge belonging to a more extensive knowledge block.
Observation checkpoint items	Yes/No questions to determine if the Checkpoint Item is happening or not answered by the QC facilitator based on their observation of the fundraiser
True statement questions	Yes/No questions to determine if the Checkpoint Item is happening or not answered by the QC facilitator based on their observation of the fundraiser
Confirming questions	A question asked by the facilitator to confirm if the fundraiser has or has not done a specific Checkpoint Item
Knowledge questions	Specific to an FSI, direct questioning is required from the facilitator to the fundraiser to understand if the fundraiser understands the knowledge needed for each area defined in the Guidance's training requirements. These questions can be asked directly in person or indirectly digitally to assess knowledge levels.
Subjective rating	Not all components of the Code and Guidance fit the objective questions and checkpoints format. The required measuring of F2F Values and Principles needs to rely on the opinion of the facilitator of the QC process. The QC process facilitator must have adequate training or preparation to enter the process with an awareness of the subjective components they need to answer.

	<p>Although difficult to quantify with a yes or a no, we are aiming to deliver the best donor experience so measuring the facilitators' experience is of value to simulate the experience of a donor.</p>
Objection sets	<p>You can standardize the objections a QC facilitator delivers as part of the AES or FSI process or leave them autonomous in this process. However, there is probably more benefit from standardizing because you will better analyze your test group.</p> <p>For example, in Q1, you set the objections to; <i>think about it, I have already donated to X, and, can I cancel.</i> If you audience score all your fundraisers, you will be able to see a good audit of your campaign on those three objections. In Q3, you can then repeat the same to test previously identified knowledge gaps or you could try a new objection set.</p> <p>We recommend strategically deciding an objection set per each round of audience experience scoring.</p>
Answering	<p>The QC facilitator needs to be strong in the answering process. The behavior happened, or it did not. The answering process is essential to manage compliance and fundraiser development.</p> <p>The facilitator should not come from the context of being nice to the fundraiser when deciding if a behaviour happened. Instead, aim to be factual and behavior-based.</p> <p>If the facilitator runs into trouble trying to answer a question and it is impossible to discern if the Checkpoint Item happened, leave the score blank and tally up what behaviors were missed so the facilitator can learn from the process. Facilitators must also avoid guessing if they cannot decide on a yes or a no.</p>
Active recall	<p>In both processes, facilitators will need to use this skill to generate accurate results. The audio and transcript process in FSIs removes a lot of this need as the facilitator uses the transcript and audio to complete the scoring process. In AES scoring, active recall (in the absence of video or audio recording) is critical to producing a fair and just score that benefits a fundraiser's development.</p>
Training	<p>Training the QC facilitator is a critical but simple task for any UNICEF employee. However, it becomes more complicated when working with an external mystery shopping agency.</p> <p>Ideally, it is good practice to train or brief the mystery shopper or AES facilitator before commencing a round of mystery shops to generate the most accurate results. Work is needed to align with the agency and find a process to get this done. Training can be delivered in person, virtually, or empower the agency to train their employees before conducting UNICEF mystery shops.</p>
Experience	<p>Before running a QC process, the QC facilitator needs to know what to look for to complete the templates. Experience in F2F or mystery shopping is desired but not essential, the process is simple to train.</p> <p>The same for external mystery shopping agencies; experience is desired but not essential. If you can find a mystery shopper who stays on the UNICEF account, then great. If not, the process is simple to train.</p>

Tips	<p>Testing + Practice</p> <p>All the QMS processes will need repeated practice to get right, so the best way to start is to test numerous times until you build confidence that the systems and processes are working for you.</p> <p>The starting point is to test on a small group of fundraisers. The templates need testing, the QC facilitator needs to test the processes, and for an FSI, there are the technical aspects of audio capture and creating a transcription that needs testing and practice to get right.</p> <p>These processes will speed up and become more efficient with practice as you review, learn, and repeat.</p> <p>Data Capture</p> <p>Digital capture of the results from an AES or FSI is better to process the captured data to facilitate an optimized Step 8 – Monitor, Measure, Quantify</p> <p>Optimized data capture can be as simple as excel spreadsheets or a digital form;</p> <ul style="list-style-type: none">- Direct to excel sheet on mobile devices- Use the template to populate questions in a digital form application (e.g., MS Forms, Survey Monkey, Jot Forms) <p>Until you find a digital solution to capture the results, a good starting point is printing the templates using the appropriate settings to size the spreadsheet correctly.</p>
Resource	<p>QMS Training Map + Template</p>

AES v's FSI Checkpoint Comparative Table

Below is listed all the different areas of skills (Checkpoints) and knowledge (Knowledge Blocks) tested by AES and FSI.

Of note, an AES if done with video or audio is a fantastic way of understanding more how fundraisers naturally communicate UNICEF knowledge and assess more difficult areas where facilitator active recall could struggle, such as the vocabulary Checkpoint.

To understand all the behaviours (Checkpoint Items) that make up a Checkpoint e.g Stopping, then review the [AES](#) and [FSI](#) templates.

Checkpoint	Skill	Knowledge	Code-Guidance Compliance	CP, GP, Ex	AES	FSI	Checkpoint Objective
Pre-observation			<input checked="" type="checkbox"/>	CP	AES		To assess site logistics and give context for the AES
Approach Observation			<input checked="" type="checkbox"/>	CP	AES		To view the fundraiser in action approaching donors
Stopping	<input checked="" type="checkbox"/>			GP	AES		To assess how the fundraiser stops people
Dress Code			<input checked="" type="checkbox"/>	CP	AES		To review if the fundraiser is following guidance
Public and Fundraiser Safety			<input checked="" type="checkbox"/>	CP	AES		
General Behaviour			<input checked="" type="checkbox"/>	CP	AES		
Stopping Engagement	<input checked="" type="checkbox"/>			GP	AES		To review how the fundraiser interacts with the AES facilitator
Appearance and Branding			<input checked="" type="checkbox"/>	CP	AES		To review if the fundraiser is following guidance
Identification			<input checked="" type="checkbox"/>	CP	AES	FSI	To review the skill levels of the fundraiser and assess where they are on their journey from CP, to GP, to Ex.
Dialogue	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	CP	AES	FSI	
Securing Focus	<input checked="" type="checkbox"/>			GP	AES	FSI	
Rapport	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	CP	AES	FSI	
Donor Discovery	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	CP	AES	FSI	
UNICEF Introduction	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	CP	AES	FSI	
Problem	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	CP	AES	FSI	
Solution	<input checked="" type="checkbox"/>			GP	AES	FSI	
Empowerment	<input checked="" type="checkbox"/>			GP	AES	FSI	
Ask	<input checked="" type="checkbox"/>			GP	AES	FSI	
Objection #1	<input checked="" type="checkbox"/>			GP	AES	FSI	
Objection #2	<input checked="" type="checkbox"/>			GP	AES	FSI	
Objection #3	<input checked="" type="checkbox"/>			GP	AES	FSI	
Structure	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	CP	AES	FSI	
Vocabulary	<input checked="" type="checkbox"/>			Ex	AES	FSI	
Tone	<input checked="" type="checkbox"/>			Ex	AES	FSI	
Cadence	<input checked="" type="checkbox"/>			Ex	AES	FSI	

Body Language	<input checked="" type="checkbox"/>			Ex	AES		All F2F Fundraisers for UNICEF should have the required knowledge in the subjects specified in Section 9. The templates specifically test UNICEF knowledge and compliance to the elements of the Code. The FSI process gives a deeper understanding of the fundraisers knowledge which a dialogue cannot fully capture.
Pledge Capture	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	CP	AES	FSI	
Data Protection	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	CP	AES	FSI	
Retention	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	CP	AES	FSI	
Interaction Pillars	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		Ex	AES	FSI	
F2F Principles	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		CP	AES	FSI	
UNICEF		<input checked="" type="checkbox"/>		CP	AES	FSI	
Code + Guidance		<input checked="" type="checkbox"/>		CP	AES	FSI	
F2F Fundraising		<input checked="" type="checkbox"/>		CP		FSI	
Child Safeguarding		<input checked="" type="checkbox"/>		CP		FSI	
Fraud		<input checked="" type="checkbox"/>		CP	AES	FSI	

- Audience Experience Scoring contains 34 Skill Checkpoints and 0 Knowledge Block Checkpoints
- Fundraiser Support Interviews contain 26 Skill Checkpoints and 5 Knowledge Block Checkpoints
- Some Checkpoints are Skills designated as CP guidance
- If a Checkpoint is a Skill + CP, then this is a critical Checkpoint to test
- Pre-observation, Social Distancing, Stopping, Dress code, Approaching Donors to Seek a Pledge, and General Behaviour are all Checkpoints that are removed from the FSI as there is no observation phase to an FSI during a role play
- Vocabulary can be tested in the AES which can provide a more 'real' and 'natural' way of testing the vocabulary used by the fundraiser and it can be further tested in a FSI, which can use audio listening and transcripts as tools to analyze dialogue content in detail
- In-house teams have complete control over their training strategy, allowing them to add any CP, GP, or Ex needs. However, when working with agencies, dependant on the relationship, managers may not have complete control over the training of UNICEF fundraisers. For CP guidance needs, managers will need to align these expectations with the agency before running quality control processes

Knowledge Blocks

Goal	To quantify, identify, and outline the knowledge needed to achieve CP, GP or Ex. FSI scoring requires adding the results of the FSI template analysis with the knowledge tests.																																																						
Outcome	Section 9 in the UNICEF F2F Guidance defines ten areas of knowledge for a F2F Fundraiser to learn and maintain. By breaking the knowledge into sets, a F2F manager can manage the learning journey and test the fundraiser on trained knowledge.																																																						
Process	<p>To establish a learning journey it is helpful to break down the different <i>sets</i> of knowledge required and group them into similar knowledge <i>blocks</i>. This Toolkit refers to Knowledge Sets (KS) and Knowledge Blocks (KB) to help guide you through the defined areas of knowledge.</p> <p>As of April 2022, these ten knowledge blocks and knowledge sets a fundraiser needs to know as defined in the universal standards:</p> <table border="1" data-bbox="391 766 1386 1398"> <thead> <tr> <th colspan="3">Knowledge Block 1: Code, Guidance & F2F</th> </tr> <tr> <th>Knowledge Set</th> <th>Content</th> <th>Source</th> </tr> </thead> <tbody> <tr> <td>KS1</td> <td>F2F Code of Conduct</td> <td>Agora + KS1 Template</td> </tr> <tr> <td>KS2</td> <td>F2F Guidance</td> <td>KS2 Template</td> </tr> <tr> <td>KS3</td> <td>F2F Fundraising</td> <td>[Local] + KS3 Template</td> </tr> <tr> <th colspan="3">Knowledge Block 2: UNICEF, Long-Term Giving & Pledge</th> </tr> <tr> <th>Knowledge Set</th> <th>Content</th> <th>Source</th> </tr> <tr> <td>KS4</td> <td>UNICEF</td> <td>[Local] + KS4 Template</td> </tr> <tr> <td>KS5</td> <td>Regular Long-Term Giving</td> <td>[Local] + KS5 Template</td> </tr> <tr> <td>KS6</td> <td>Pledge Process</td> <td>[Local] + KS6 Template</td> </tr> <tr> <th colspan="3">Knowledge Block 3: Child Safeguarding, Fraud</th> </tr> <tr> <th>Knowledge Set</th> <th>Content</th> <th>Source</th> </tr> <tr> <td>KS7</td> <td>Child Safeguarding</td> <td>Agora + KS7 Template</td> </tr> <tr> <td>KS8</td> <td>Fraud Awareness for F2F</td> <td>Agora + KS8 Template</td> </tr> <tr> <th colspan="3">Knowledge Block 4: Data Protection, Information Disclosure</th> </tr> <tr> <th>Knowledge Set</th> <th>Content</th> <th>Source</th> </tr> <tr> <td>KS9</td> <td>Data Protection</td> <td>[Local] + KS9 Template</td> </tr> <tr> <td>KS10</td> <td>Annex 2: Information Disclosure</td> <td>[Local] + KS10 Template</td> </tr> </tbody> </table>	Knowledge Block 1: Code, Guidance & F2F			Knowledge Set	Content	Source	KS1	F2F Code of Conduct	Agora + KS1 Template	KS2	F2F Guidance	KS2 Template	KS3	F2F Fundraising	[Local] + KS3 Template	Knowledge Block 2: UNICEF, Long-Term Giving & Pledge			Knowledge Set	Content	Source	KS4	UNICEF	[Local] + KS4 Template	KS5	Regular Long-Term Giving	[Local] + KS5 Template	KS6	Pledge Process	[Local] + KS6 Template	Knowledge Block 3: Child Safeguarding, Fraud			Knowledge Set	Content	Source	KS7	Child Safeguarding	Agora + KS7 Template	KS8	Fraud Awareness for F2F	Agora + KS8 Template	Knowledge Block 4: Data Protection, Information Disclosure			Knowledge Set	Content	Source	KS9	Data Protection	[Local] + KS9 Template	KS10	Annex 2: Information Disclosure	[Local] + KS10 Template
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Requirement	Establish a system to comply with current and future knowledge needs listed in the F2F Guidance. Additional knowledge sets may be added to the list as they are developed and could create a new block or added to an existing block.																																																						
Guidance	<p>Fundraiser Support Interviews</p> <p>To test the knowledge of a fundraiser in the areas we cannot test in their dialogues we need a different process. A role play dialogue alone cannot test how much of the required knowledge a fundraiser understands so it also requires a different testing process.</p> <p>FSIs use the 'interview' component of the process to test these areas of knowledge we cannot test in a dialogue.</p>																																																						

	<p>To test the knowledge from Section 9 a quiz format is a good way to conduct the test, and it is the easiest way to gather right or wrong answers to questions to get a quantified number or score on the fundraisers' knowledge. You can look at the Knowledge Sets as ten different quizzes to use to maintain and refresh fundraiser knowledge overtime.</p> <p>Child Safeguarding, Fraud and Code trainings are all Agora trainings with tests and the fundraisers certificate is proof they have completed the training. We recommend quarterly refreshing to ensure this critical knowledge is maintained and FSIs help you assess overall knowledge depth that cannot be fully captured is a dialogue.</p> <p>Knowledge Block Templates Find the Q&A's for each Knowledge Block and Set in the QMS Training Map + Template spreadsheet. The Q&A's are so you can put the knowledge testing component in an FSI in a format that works for your market.</p> <p>Knowledge Testing Formats The facilitator will get great insight from conducting the interview one-on-one, but it is time-consuming, so using this method frequently may not always be best.</p> <p>Other manual processes are faster. For example, using the quiz as a handout at the FSI appointment or as an attachment to an email for the fundraiser to complete written typed answers in a time window (30-60mins depending on how many KBs you are testing).</p> <p>Digital Form Usage The fastest way to process knowledge testing is the digital form of a multiple-choice quiz. It is quicker to process results and pull results from excel files.</p> <p>In the example here, the opening questions are multiple-choice and the others with text boxes with correct answers flagged. Setting up the forms multiple-choice (and not making it too hard or too easy) is good practice. Use the KS Templates to cut and paste the Q&As.</p>
<p>Tips</p>	<p>Agora Usage As of April 2022, we have KS1, KS7, and KS8 on Agora. The Q&A's in the Knowledge Blocks Templates for KS1, KS7, and KS8 have the questions linked to the initial Agora training. If a training is on Agora, then a fundraiser needs to take this in their onboarding or initial induction period. However, when you need to test the fundraisers' knowledge and quantify it in an FSI, you will not be able to use Agora for this purpose.</p> <p>To keep fundraisers fresh on their Section 9 knowledge, use the KS Templates as the Q&A in the FSI process to generate a quantified score. You can then send fundraisers back to</p>

	<p>Agora to retake the training if their knowledge is weak and test them again in the next FSI to see improvement.</p> <p><i>Training journey</i></p> <p>Section 9 brings additional training needs, and needs might be discovered when implementing a QC process. For this reason, we highly recommend building a training journey to support the learning needs of the fundraiser. There needs to be clear expectations set for the fundraiser at the start of employment. All F2F team members involved in training need to know what is to be trained. Overall, there needs to be a process to ensure that the training journey is delivered and progress tracked per fundraiser.</p>
Resource	<p>Exemplar: Knowledge Set #1: F2F Code of Conduct [Microsoft Forms Template]</p>

UNICEF Knowledge Management

<p>Goal</p>	<p>To quantify a fundraiser's knowledge in the FSI process and be able to set performance KPIs to knowledge, it needs to be clear to the fundraiser precisely what knowledge they need to build and maintain about UNICEF. UNICEF knowledge should all be in one place to make the learning of UNICEF knowledge clear so fundraisers can score high in a QC process, for example, in one document or manual.</p> <p>This process's overall goal (especially to manage multiple large agencies effectively) is to have a system that allows you to say, <i>'if it is in the UNICEF Knowledge Manual, then it is approved for dialogue content.'</i></p>									
<p>Outcome</p>	<p>Creating a structured UNICEF manual to contain everything a fundraiser needs to know helps define what content is required to manage and trained by your F2F team. In addition, a structured manual helps fundraisers have optimal scripts which optimize F2F performance and donor quality.</p> <p>If there is a single place a fundraiser knows where all the information is stored that they can use in their dialogue, then this has a significant impact on their autonomy. Fundraisers can evolve their conversations to have more of an impact on donors. A simple UNICEF knowledge management system encourages constant self-development to update dialogue scripts with relevant information when performance issues occur, or a refresh is needed.</p> <p>Most importantly, this process gives a fundraiser a source to improve their scripts when they receive their AES or FSI score in Step 9, Feedback.</p>									
<p>Process</p>	<ol style="list-style-type: none"> 1. Review this section to understand UNICEF F2F knowledge needs 2. Decide if a UNICEF Dialogue Knowledge Management Manual works for your operation 3. Decide if a F2F KM System works for your market 4. If yes to a F2F KM System, then find a KM Owner <p>Create a UNICEF Dialogue Knowledge Management Manual [Template] by editing and populating this template.</p> <p>UNICEF F2F Knowledge Management System</p> <table border="1" data-bbox="365 1600 1412 1869"> <thead> <tr> <th data-bbox="365 1600 535 1667">F2F UNICEF KM Step</th> <th data-bbox="535 1600 1136 1667">Goal</th> <th data-bbox="1136 1600 1412 1667">Action</th> </tr> </thead> <tbody> <tr> <td data-bbox="365 1667 535 1736"><i>Allocate KM responsibility</i></td> <td data-bbox="535 1667 1136 1736">As a pre-step, a F2F operation must appoint a KM owner to manage the system as the system is always on</td> <td data-bbox="1136 1667 1412 1736">Appoint a KM owner</td> </tr> <tr> <td data-bbox="365 1736 535 1869">Sharing</td> <td data-bbox="535 1736 1136 1869">Information is incoming consistently daily and weekly, and UNICEF generates a high volume of information. Of course, not all is relevant to F2F, but some is. The UNICEF network and Global F2F Team also generate relevant knowledge,</td> <td data-bbox="1136 1736 1412 1869">KM owner to review all incoming UNICEF information</td> </tr> </tbody> </table>	F2F UNICEF KM Step	Goal	Action	<i>Allocate KM responsibility</i>	As a pre-step, a F2F operation must appoint a KM owner to manage the system as the system is always on	Appoint a KM owner	Sharing	Information is incoming consistently daily and weekly, and UNICEF generates a high volume of information. Of course, not all is relevant to F2F, but some is. The UNICEF network and Global F2F Team also generate relevant knowledge,	KM owner to review all incoming UNICEF information
F2F UNICEF KM Step	Goal	Action								
<i>Allocate KM responsibility</i>	As a pre-step, a F2F operation must appoint a KM owner to manage the system as the system is always on	Appoint a KM owner								
Sharing	Information is incoming consistently daily and weekly, and UNICEF generates a high volume of information. Of course, not all is relevant to F2F, but some is. The UNICEF network and Global F2F Team also generate relevant knowledge,	KM owner to review all incoming UNICEF information								

		primarily through webinars and (soon to be live) SharePoint and Yammer.	
	Discovery	Markets frequently also go searching for knowledge when a gap is discovered	KM owner begins discovery by searching or requesting
	Review	The KM owner is continually reviewing shared and discovered UNICEF information	KM owner to decide on relevancy for F2F
	Capture	Relevant knowledge that will benefit from being in the source document is flagged	KM owner captures relevant UNICEF knowledge for F2F in their market
	Approve	The captured relevant knowledge needs internal market approval to use in F2F dialogues	KM owner seeks approval for fundraisers to use the content
	Distil	If necessary, the KM owner works to dilute the knowledge into digestible pieces so that a F2F Fundraiser can easily read so the source document with clear messages, case studies, stories, and statistics	KM owner clips and re-writes any heavy text
	Edit	The source document is now edited with the new material and kept updated. Each time something new is added, it is also an excellent time to see if anything is outdated and needs removing	KM owner edits the source document with approved material
	Broadcast	The specific edits made and where the manual was edited are then broadcast to the source manual users: managers, senior Tls, agency account managers	KM owner broadcasts the changes to bring awareness to the changes
	See the system here .		
Requirement	<p>If not already present in your market, then work towards developing a UNICEF Knowledge Manual with the provided template. The initial creation of a manual is a large task, but you likely have the knowledge of other documents, and it could be as simple as gathering it all and putting it in one place.</p> <p>If you start from scratch, begin by creating the CP needs first and then adding the GP, and EX needs over time. The CP needs will be enough to deliver on the Guidance, Section 9. Adding GP and EX sections to your manual over time will support fundraisers in growing their knowledge which will directly enhance the quality of their dialogues.</p>		
Guidance	<p>UNICEF F2F Knowledge Management System Benefits</p> <ul style="list-style-type: none"> - Once a system is in place, non-F2F UNICEF teams know precisely what is expected and required by the F2F team and know exactly how they can deliver the information to support the F2F team with UNICEF content - It can enhance the relationship with other non-F2F teams as it illustrates knowledge management and content control are critical processes for F2F 		

Single source document benefits

- A single document is a 'content bridge' between the F2F teams and other internal UNICEF teams (content, retention, communications, and marketing), allowing for approved information to flow faster and easier to F2F teams as it provides them a simple avenue to share with edits or additions to the source document when they have new or changing information
- The document means a fundraiser only needs to go to one place if they have questions or discover knowledge gaps when talking to donors (they can address these gaps immediately themselves in the field)
- The document drives autonomous self-improvement of a fundraisers dialogue with one single place to go to optimize or test new dialogues to improve fundraising performance
- Once a fundraiser creates the pattern of behaviour of upskilling themselves from approved content, then this further drives autonomous self-improvement, which is a primary driver to fundraisers reaching their potential and delivering the best possible donor experience for UNICEF
- The document creates the space to add additional content or campaigns easily and to test and remove content that does or does not work
- The document becomes the source for all UNICEF additional training material produced: induction materials, presentations, model pitches, model objections
- The document is needed to manage a fundraiser through a learning journey (CP, GP, EX) to ensure fundraisers are building their knowledge over time and experienced fundraisers and managers know more about UNICEF over time

Tips

Fundraiser Learning Journeys

The source document should not be viewed as the method to train fundraisers by giving it to them and expecting them to learn it all. Instead, fundraisers need a monitored and measured learning journey through the content that exists within the source document.

If they want to read the entire document and study it, then excellent, but the document is primarily there to provide the content for managers and trainers to pull from to create and deliver UNICEF training and support their teams. For fundraisers, it is a place of reference as and when they need it to improve their dialogues and stop them from discovering non-approved information and placing that into their dialogues. Using non-approved information would see them score low in QC processes.

Agencies

Non-approved information in scripts and dialogues is a significant issue for agency managers to tackle. Running a '*if it is in the UNICEF Knowledge Manual, then it is approved for dialogue content*' operation is an excellent and simple way to manage agencies and prevent running AES and FSI QC processes that churn up non-approved information.

A source document is a preventive strategy to optimize your QC processes when supporting the agency fundraisers. UNICEF agency fundraisers generally love representing UNICEF. They do not want UNICEF to test them and tell them they are using the wrong information, which can be disheartening in Step 9, the Feedback stage.

It also optimizes the QC processes as the feedback to the fundraiser can be more helpful around different Checkpoints that will benefit their performance more. Generally, fundraisers value feedback directly from UNICEF, so it is an excellent chance for UNICEF to enhance their skills indirectly. The QC processes will show the value of organizing approved and non-approved content.

If we view this from the agency perspective, it supports agency managers to make UNICEF knowledge easy to manage. Not only that, but it is also an opportunity for agencies to edit the approved information and curate based on their creativity to get the best out of their team, which should be encouraged!

'Live' Document

Keeping a 'live' and fluid document and alerting all the stakeholders to any changes for them to act upon as you manage your content is a simple process once established. Alerts remove the need for ineffective email updates. You don't need to update PPTs once per year and risk having outdated documents and material with your F2F teams. You simply alert all stakeholders to the changes you have made to the manual (which can be managed

as a shared document on SharePoint) and request them to plan around ensuring the content is changed with their fundraisers by a specific time.

Manual options

Some markets have an optimized operations manual detailing administrative processes, SOPs, guidelines, KPIs, and pay and performance rewards. An operations manual is an excellent addition to support the well-being of the fundraisers, but a UNICEF knowledge manual is different. Other markets have documentation around skills required for F2F. Again, this is an excellent addition to support training and development but distinct from a UNICEF knowledge manual.

A skills manual can be handy to support your AES and FSI templates. For example, the Pledge Capture part in the template contains the following Checkpoints: Pledge Capture, Data Protection + Data Protection Script, Retention + Donor Journey Script

These three Checkpoints contain many CP needs that a fundraiser needs support. A short and focused skills manual could have significant value to help support Checkpoint items such as:

27.2	The fundraiser delivers a consent script and clearly explains why UNICEF is asking for i) personal data ii) how it will be used and shared before collecting the data and iii) keep a record that you have done so	The fundraiser must explain the three levels of content in this checkpoint item and receive consent from the donor before collecting the data (and note record of that consent)
28.6	The fundraiser ends the dialogue with a brief description of the donor journey to set the donors expectations about when and how UNICEF will communicate with them in the coming months	Donor journey clarity: For UNICEF to deliver an optimized F2F donor journey, the donor must know what the next steps are by UNICEF in the days, weeks and months after they sign up to increase open rates on emails and increase contact rates on welcome calls or satisfaction surveys

To support fundraisers gaining required UNICEF knowledge in Guidance, Section 9 in order of priority, the three manuals recommended a fundraiser should have access to are;

1. UNICEF Knowledge Manual
2. Operations Manual
3. [Optional] Skills Manual (or SOP documentation)

Long term, any QMS would receive an additional benefit if fundraisers had easy access to these three manuals as digital documents to allow remote access on their mobile device / PC.

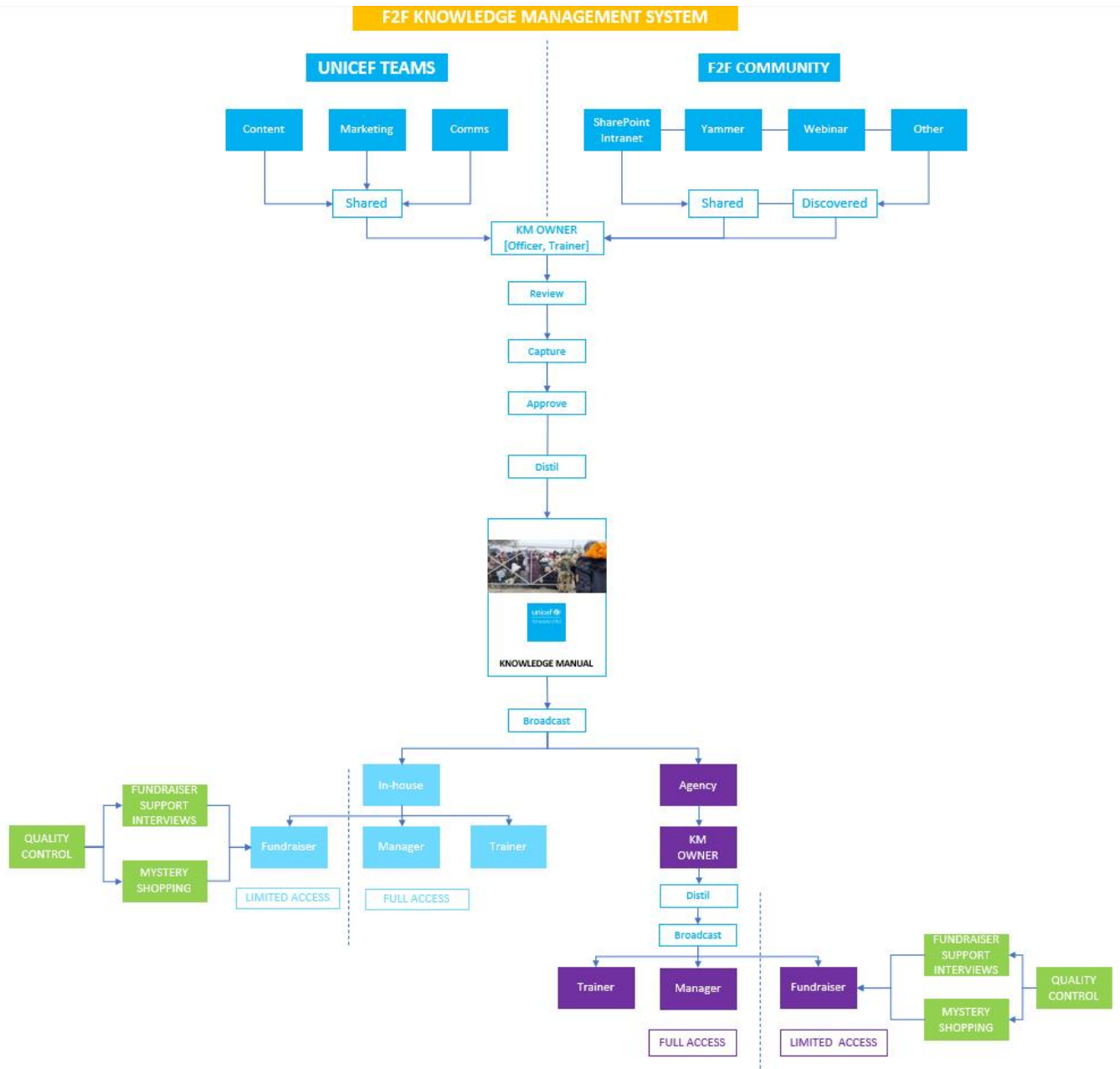
Resource	UNICEF Dialogue Knowledge Management Manual [Template] UNICEF Dialogue Knowledge Management Manual [CP-GP-Ex] UNICEF Knowledge Management System
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Skills Management

<p>Goal</p>	<p>Although all the exact skills required for F2F are not explicitly mentioned in the Code and Guidance universal standards, many are needed to deliver on the standards' needs. For example, in the IG Strategy 22-25 and the F2F Strategy 22-25, a few skills are required to deliver on strategic needs. Therefore, the QMS needs to capture all the skills that make up F2F Fundraising and bring clarity to all the components a fundraiser needs to deliver quality donors.</p> <p>Like knowledge, to deliver a qualitative & quantified score in a QC process, skills must be measured to see if they are or are not happening so UNICEF can support and guide fundraisers to improve and positively impact the donor experience.</p>
<p>Outcome</p>	<p>Highlight a straightforward process on what to train and show fundraisers what is expected of them to generate quality donors. Skills are clearly defined to be measured in quality control processes which allows the results to be quantified.</p>
<p>Process</p>	<p>Unlike knowledge which we can categorize in sets and blocks, the skills required first need to be defined and listed. Then they need to be trained for the fundraiser. Then the quality control processes can test the presence of the required skills and gather valuable feedback on the fundraiser's ability within a particular skill set.</p> <p>To categorize skills, we use the skill Checkpoint and Checkpoint Items system.</p>
<p>Requirement</p>	<p>Training</p> <p>Like knowledge, fundraisers should be trained on all the skills expected to know. Template management helps form the fundraiser training content and their learning journey. Just as with knowledge and the ten knowledge sets, fundraisers need to build their capabilities on all the defined skills that make up the Checkpoints in your local market.</p> <p>As you work through the QMS, you might discover skills that you do not specifically train, and you will need to find a place for them in your new starter training. You will need to review your new starter training and a process to train all your current employees on any CP or GP skills that might be missing. We encourage a plan for Excellence skills also to be integrated.</p> <p>As a QC process becomes consistent, it will generate areas of focus for your team to target and train. Competency levels of your team or agency will be apparent, and planning and building training and engagement calendars to work on findings will positively drive results by targeting discovered areas of need.</p> <p>Template Management</p> <p>Any QC template needs to be managed, so fundraisers are being tested on what they have been trained. Testing the right skills in the templates creates a fair and valuable process that delivers fundraiser feedback they can use.</p>

	<p>Templates can be edited based on experience, as not all fundraisers will have the same experience during a QC process. In addition, templates can be edited when new skills (like the strategic skills) go live in your market or when other skills become redundant or need adapting as F2F evolves.</p>
<p>Guidance</p>	<p>Behaviors v's Judgements</p> <p>The Checkpoint Items focus on behaviors. This connects the doing or not doing of the behaviours to results. Results are the outcomes of behaviours. Managing skills as sets of behaviours provides depth into what is working and what needs work.</p> <p>To populate the Checkpoint Items, we are looking for specific behaviours and actions you can see or hear. Behaviours are used in the templates as they are objective, not subjective. Either they happened, or they did not occur. Behaviours are also trainable. If you break a skill set down, like stopping, into specific behaviors you need to see, you can train stopping as a skill. Breaking down skills into behaviours supports fundraiser development as it gives them feedback on skills they can master by learning the behaviours that make up that skill.</p> <p>When editing the templates with specific skill sets, always avoid framing questions that require the QC Facilitator to give an opinion or judgment. Asking questions that invite subjective answers makes a QC process difficult as they ask the facilitator for their opinion, and ideas change from person to person. Consistency with scoring produces the most useful quantitative data. Therefore, always frame the Checkpoint Item as a behaviour that is answered with a 1 for Yes, and a 0 for No to facilitate the quantification.</p>
<p>Tips</p>	<p>Performance Gaps</p> <p>Defining all the required skills in Checkpoints can highlight a fundraiser's performance gap, and once a fundraiser knows precisely where they have a performance gap, they can work towards closing that gap. So, we need to shine the spotlight on these gaps and allow fundraisers to work to complete them.</p> <p>Mapping out the performance gaps in Step 9 – Feedback helps accelerate fundraisers learning journeys and allows them to be aware of everything they need to do to deliver an optimum donor experience.</p>

Annex
UNICEF Knowledge Management System



[UNICEF Dialogue Knowledge Management Manual \[CP-GP-Ex\]](#)

UNICEF is a vast expanse of knowledge. To make it easy for fundraisers to learn and direct them exactly what to learn to help them be successful F2F Fundraisers, we recommend dissecting the UNICEF Knowledge Manual into CP, GP, and Ex.

When populating the template, we recommend beginning with the CP sections as the starting point to create the source document.

SECTION	SUBJECT	LEARNING OBJECTIVE	SUGGESTED CONTENT
1	United Nations Vision and Mission	Who and what are the United Nations?	<ul style="list-style-type: none"> - Mission - Vision - UNICEF's role in the UN - UN mandate to UNICEF - Differences from other relevant UN agencies (UNHCR, WFP, WHO) - How does UNICEF work/collaborate with other agencies?
2	United Nations Organizational Structure		<ul style="list-style-type: none"> - UN System - Headquarters roles and functions - Main Bodies/principal organs - Programs funds specialized agencies - What is the difference? - How does the funding structure differ?
3	The Universal Declaration of Human Rights	An understanding of human rights in general	Not many fundraising managers can easily explain or train these to a F2F fundraiser
4	The Convention on the Rights of the Child	Understand the rights outlined in the Convention on the Rights of the Child: "3 Ps": Provision, Protection, and Participation.	
5	Sustainable Development Goals	The context for urgency in fundraising and what UNICEF is strategically working towards long term	Managers should be able to easily explain or adequately train these: https://sdgs.un.org/goals
6	UNICEF Vision and Mission	Global intro to who UNICEF is, what they stand for, and how they work.	<ul style="list-style-type: none"> - Mission, how we work - Vision, who we are, and what we stand for - How does UNICEF help children and families? - Are we delivering the aid or serving as a third-party connector?
7	UNICEF History		<ul style="list-style-type: none"> - History - Achievements and successes timeline
8	UNICEF Organizational Structure		<ul style="list-style-type: none"> - Organizational Structure - Levels - Country Offices - National Committees

			<ul style="list-style-type: none"> - Roles and responsibilities - How do the levels work together? - Leadership - Are we delivering the aid or serving as a third-party connector?
9	UNICEF Strategic Frameworks	Context for the role of F2F in achieving high-level UNICEF goals and how it can be achieved.	<ul style="list-style-type: none"> - Strategic Plan Highlights - IG Strategy 2022-25 - F2F Global Strategy
10	Individual Giving	An overview of what precisely individual giving is, how it works at UNICEF with all the IG channels and team, and how individual giving is so essential to UNICEF	<ul style="list-style-type: none"> - Previous successes - Historic growth timeline - Target numbers - Highlight the importance of monthly donors for UNICEF. It is individuals who fund UNICEF and why individual giving is so vital to UNICEF - Team structure - The support structure (IG, RSC, Specialists, Global, Regional) - Investment process - RR v Restricted
11	UNICEF Brand	Introduce fundraisers to the strength of the UNICEF brand, so it further empowers, motivates, and gives them confidence in dialoguing with donors	Global + local stats and give the context of the importance of UNICEF's brand and how to use its public familiarity to establish trust in a F2F pledge.
12	UNICEF's Case for Engagement	Give fundraisers specific information to persuade donors to act now.	<ul style="list-style-type: none"> - Why take action? - Why do human rights and children's rights matter? - Why do children need you now? - Why should donors care about UNICEF?
13	The Importance of Monthly Giving – Pledge and Retention and why it is important	Pledge and retention clarity so all fundraisers can understand and explain it easily.	<p>What is Monthly Giving? How Monthly Giving Works</p> <ul style="list-style-type: none"> • How does a donor sign up? • What happens after the donor sign's up? • Important facts relevant to monthly donor • Payment frequency options • Explanation of monthly giving program in general • Include alternative names <p>Importance of Monthly Giving; Why is monthly giving the preferred option?</p> <ul style="list-style-type: none"> • Ability to respond to emergencies in 48 hours

			<ul style="list-style-type: none"> • Plan & efficient • Long term solutions • Cost-saving/buying power • Giving method with the most significant impact • Include donor friendly explanations <p>Benefits of Monthly Giving</p> <ul style="list-style-type: none"> • To UNICEF • To donors
14	F2F Approved Programmatic Content: Education Nutrition Health Child Protection WASH Emergencies	One section for all F2F content that fundraisers can speak about for in-house and agencies. This is where all the information is stored for fundraisers to inspire donors about UNICEF's work.	<i>Split by each program:</i> <ul style="list-style-type: none"> ○ Background history (e.g., past emergency response success) ○ Previous achievements ○ Current challenges (complexities, urgency, facts) ○ Solutions (responses, successes, achievements, actions) ○ Empowerment (short term goals, long term goals, hopes, targets) ○ Ask & Close (financials, shopping list/dollar handles) ○ Case Studies (human need, emotive examples, making a difference) ○ Price points (BE economic presentation)
15	Communication & Donor Messaging	Highlight key phrasings or arguments fundraisers can use to persuade donors to sign up now.	Summarized documents with critical phrases managers and fundraisers can use to build their scripts and objections
16	F2F Donor Journey		
17	UNICEF Financials Breakdowns	Global Local	Help fundraisers understand a top-level view of how the donations fund the programs
18	UNIQUE UNICEF	Key points to highlight to fundraisers about what makes UNICEF unique	Help fundraisers persuade donors to pledge to UNICEF. Specific comparative differences versus other child organizations and NGO's
19	Key Themes/Vocabulary	Key words and definitions for fundraisers	To build their UNICEF and global development vocabulary which will enhance their communication to donors and a reference point/cross check to help build impactful scripts (a missing area from all script work done with all regional dialogue teams across TM and F2F)

Market specific needs	Additional Country Office specific needs
The 'Donor requirements and Donor Qualifications' section needs all the rules for a fundraiser to be able to sign up a	If you are a CO, then look to complete: Content Checklist

<p>quality donor and to set the quality parameters and expectations to prevent issues post sign up.</p> <p>The 'UNICEF Accountability' section needs detailed information that needs to be known by fundraisers to answer objections and build trust with donors.</p> <p>Content Checklist</p> <ul style="list-style-type: none"> <input type="checkbox"/> What the donor receives? <input type="checkbox"/> When they receive them? <input type="checkbox"/> The initial donor journey <input type="checkbox"/> F2F campaign parameters <input type="checkbox"/> Quality KPIs and targets <input type="checkbox"/> Value KPIs and targets <input type="checkbox"/> Pledge capture process <input type="checkbox"/> Payment rules and guidelines <input type="checkbox"/> Quality rules <input type="checkbox"/> Local data or privacy guidelines <input type="checkbox"/> Local PCI compliance <input type="checkbox"/> Anything else of relevance to the AES and FSI template Checkpoints 	<ul style="list-style-type: none"> <input type="checkbox"/> Localized history, vision, mission <input type="checkbox"/> List of fundraising channels <input type="checkbox"/> CO strategy <input type="checkbox"/> Annual goals <input type="checkbox"/> Local financial breakdowns <input type="checkbox"/> Local brand reports <input type="checkbox"/> Local monthly giving program history and current goals <input type="checkbox"/> F2F Approved Programmatic Content: <ul style="list-style-type: none"> <input type="checkbox"/> Education <input type="checkbox"/> Nutrition <input type="checkbox"/> Health <input type="checkbox"/> Child Protection <input type="checkbox"/> WASH <input type="checkbox"/> Emergencies <input type="checkbox"/> Background history (e.g. past emergency response success) <input type="checkbox"/> Previous achievements <input type="checkbox"/> Current challenges (complexities, urgency, facts) <input type="checkbox"/> Solutions (responses, successes, achievements, actions) <input type="checkbox"/> Empowerment (short term goals, long term goals, hopes, targets) <input type="checkbox"/> Ask & Close (financials, price points) <input type="checkbox"/> Case Studies (human need, emotive examples, making a difference)
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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?