F2F Universal Standards and Quality Management System [QMS]

Mike, Danny, Ana | F2F Fundraising Congress 2023

30th May - 1st June, Vienna

Danny McDonnell

- Fundraiser for 16 years
- Father of 3
- Vinyl Fanatic

Mike

- Fundraiser for 20 years
- Father of 3 (2 cats, 1 dog)
- Might like triathlon

Today's Focus

- Global F2F Code of Conduct

- UNICEF Guidance on F2F Fundraising

- Quality control innovation and measuring audience experience

- QC process and qualitative fundraiser KPIs

1. Frame
2. Wheels
3. Tires
4. Handlebars
5. Brakes
6. Pedals
7. Chain
8. Gears
9. Saddle
10. Fork
11. Crankset
12. Derailleurs
13. Shifters
14. Brake levers
15. Seatpost
16. Accessories

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Face-to-Face Values

Professional
Adhere to Unicef's standards and behaviours.

Informative
Present accurate and enlightening information.

Inspiring
Deliver emotive dialogues for an emotive reaction.

Empowering
Generate excitement as to why donating will be a moving experience.

Memorable
Create remarkable moments to inspire long term commitment.

I **understand** and live by **UNICEF's values** of care, respect, integrity, trust, and accountability.

I **strive** to convey my **commitment** to fulfilling UNICEF's vision of creating a world where the rights of every child are realized.

I **treat** each person I meet with **respect** and **empathy**.

I **connect** with people and attempt to win both **hearts** and **minds**.

I **strive** to deliver **quality** in my dialogue with each person I meet.

I **only recruit** willing and committed donors who are inspired to **support UNICEF long term**.

I **maintain** UNICEF's **integrity** and never put our supporter's **trust** in us at risk.

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Face-to-Face Principles

F2F Quality Challenges

1. Many donors **cancel too early** in their journey

2. Motivated fundraisers could be **under trained & underskilled**

3. **Cannot truly measure** the donor experience the fundraiser is creating

4. **Difficulty identifying** the parts of the dialogue that will improve donor experience

2019 ➡ Do you currently use mystery shopping as a method of quality control ?

UNICEF: 44 F2F Markets

With approx. 2500 fundraisers, no unified WOW or overarching risk management strategy and with serious complaints inevitable we needed to make a change…

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F2F
QMS: Objectives, Goals

Main Objectives

1. Facilitate the **launch, integration, & optimization** of a Quality Management System [QMS] in our F2F operations

2. Establish a clear process around **what we are saying** and **how we saying it** and check is everything we are saying is **actually happening**

1. Set universal fundraising standards

- Setting high **standards for behaviours and knowledge** raises expectations of F2F and brings clarity

- Standards are the **starting point** to be able to implement effective quality control procedures

2. Establish quality control systems

- The Code and Guidance will **empower teams to monitor compliance and good practice** to the Code and universal training needs set out in the Guidance

- The QMS provides the supporting guides, processes, and training to help run the quality control processes

3. Performance manage skills and knowledge KPIs

- Quantifying **skills** and **knowledge** allows performance management in these critical areas to help fundraisers access their potential

- New **quality metrics**;
  - speed up fundraisers' development
  - access full potential sooner
  - result in better donor experiences
  - increased income from the channel
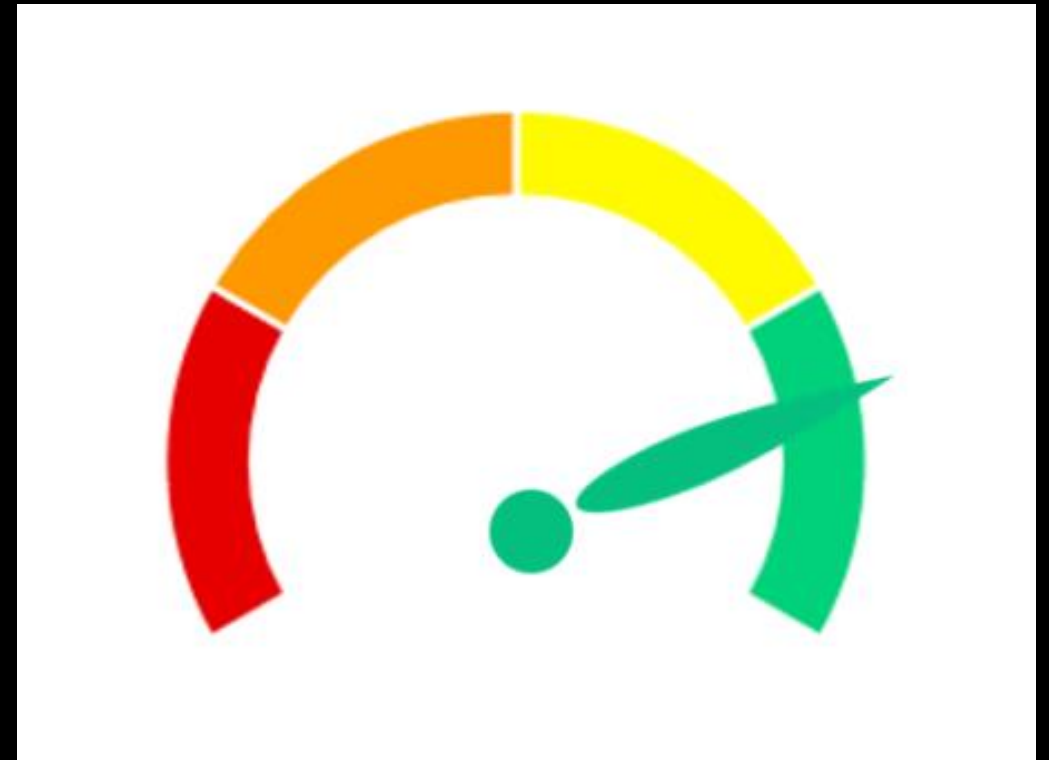
4. Improve monitoring, reporting, and feedback

- The new quality metrics will allow F2F managers to measure fundraisers' skill and knowledge levels to **improve dialogues and the donor experience**

- Markets will be able to begin to **track overall in-house and/or agency qualitative performance**

# 5. Improve overall fundraising performance

- The results from quality control testing will help fundraisers upskill, leading to increases in **PnLTV,** increased **retention,** and increased **positive feedback**

- **Preserve the integrity of the UNICEF brand** by reducing the risk associated with under-trained fundraisers

- **New quality KPIs** will help deliver a more accurate analysis of current performance

6.   Self-regulation

- UNICEF will **lead fundraising practice across the sector** and be the first NPO to deliver a Global F2F Code and Guidance to self-regulate F2F

- UNICEF will create the systems and structures to allow F2F to thrive and **set the example for other F2F operators to follow** to optimize F2F standards and quality control
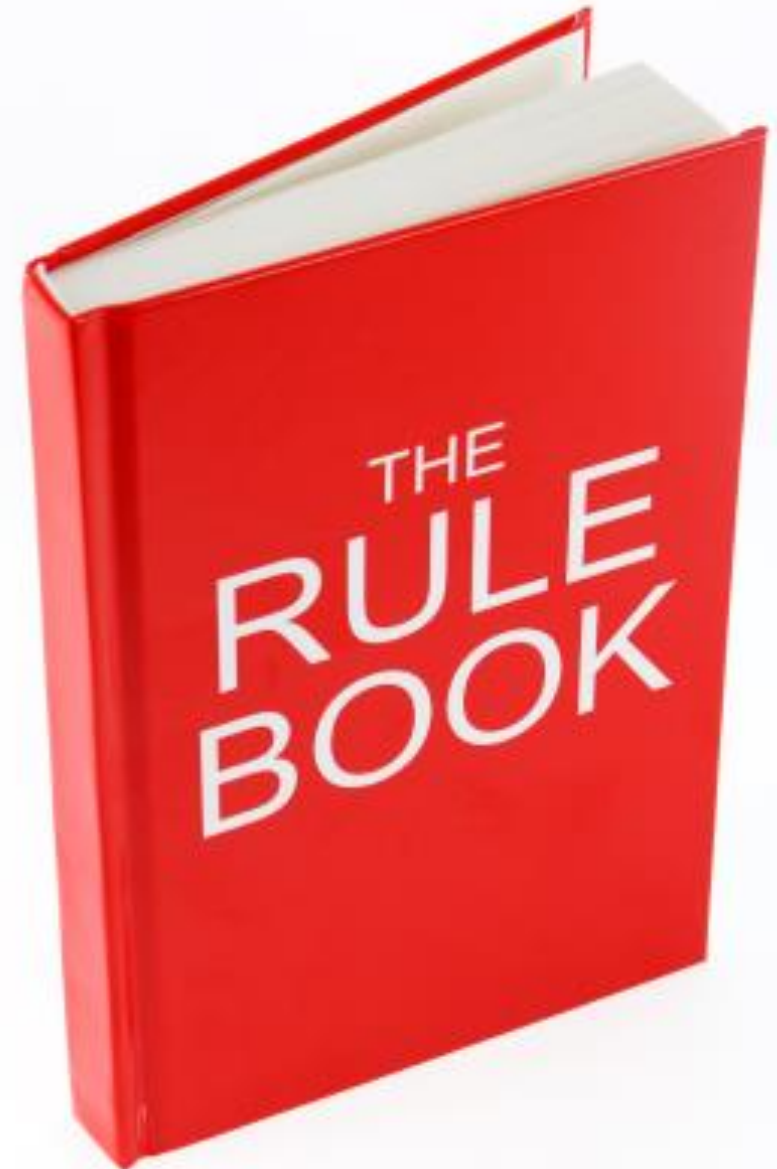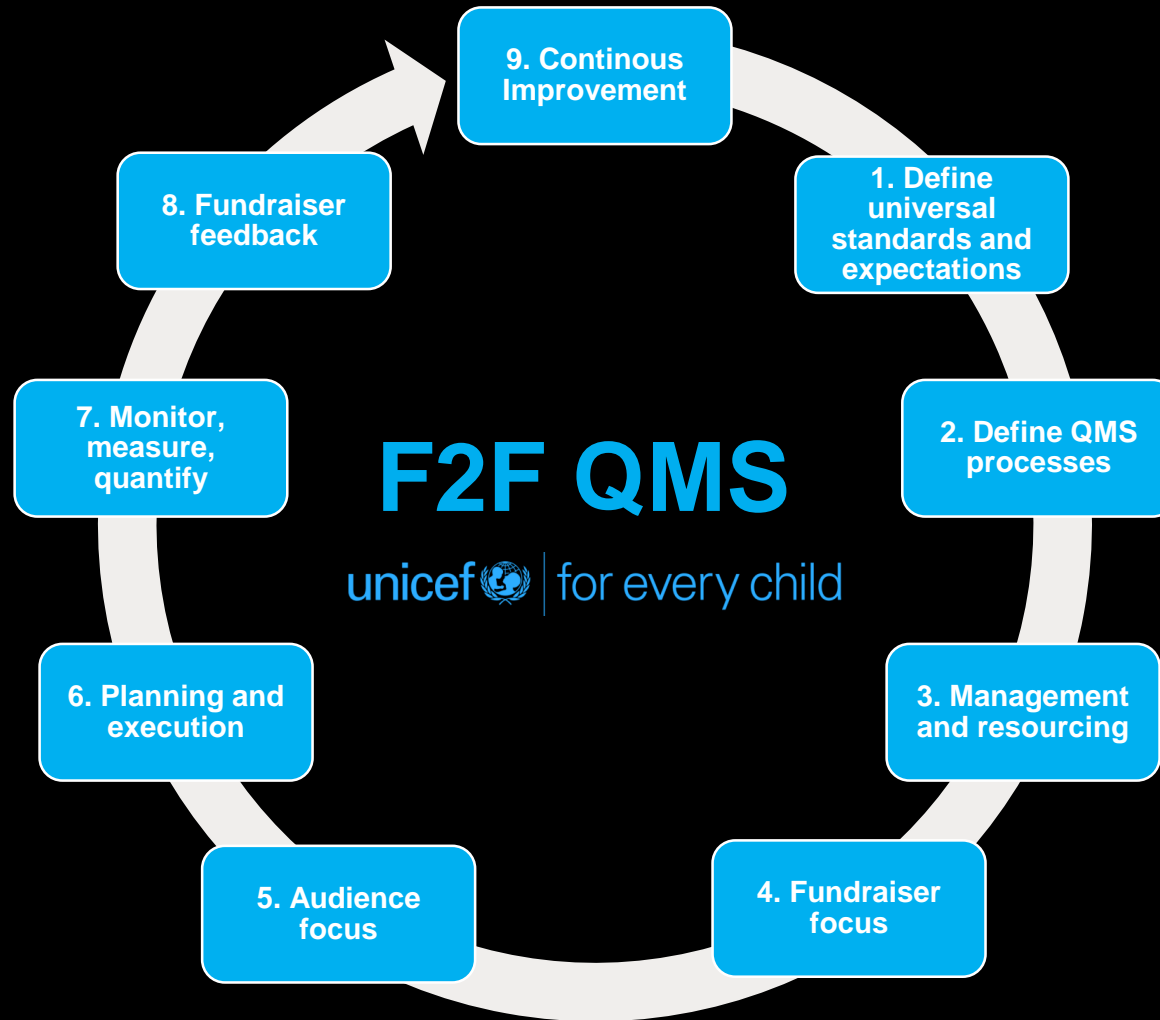
Quality management can and will work

- Every UNICEF fundraiser must be in tune with UNICEF's strategy and desire to improve, and donor satisfaction must reign supreme

QMS Step 1 - F2F Universal Standards

Global F2F Code of Conduct

– Identifies **unified agreed compliance principles** and good practices around acceptable fundraising behaviours

– **Removes current inconsistencies** between markets.

– **Captures existing good practices** across all UNICEF market and from various self-regulatory F2F governing bodies.

UNICEF Guidance on F2F Fundraising

- Defines the recommended **processes and standards to plan, develop, train, and monitor** F2F Fundraising.

- **Mitigates the risk** of fundraisers communicating with donors <u>without</u> sufficient **knowledge** or **skills**

- Requires markets to **monitor compliance** with local processes and the Code

Section 9, Guidance

Prior to commencing fundraising work, all F2F Fundraisers:

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

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

Child safeguarding;

~~Ethics and integrity at UNICEF.~~

~~Prevention of Sexual Exploitation and Abuse (PSEA)~~

~~Information Security and Data Privacy training~~

Fraud awareness F2F fundraisers

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.

But how do we manage the universal standards?

QMS Step 2 – QMS Processes

QMS Templates, Checklists

Audience Experience (or Mystery Shop!) Score [Template]

	RED FLAG REVIEW			Shopper & Visit Particulars		Scoring	
	CHECKPOINT 1: Red Flag Review *[If 'Yes', then automatic fail]*			Name of Shopper		**101 Compliance**	
Y/N	**#**	**Checkpoint Item**		Name of Fundraiser		**Good Practice**	
	RF1	Was the fundraiser fundraising without an ID badge?				**Excellence**	
	RF2	Did the fundraiser claim they are a volunteer (UN Volunteers exempt)?		Sub-channel	*INSERT DROP DOWN]*	**Overall Experience**	
	RF3	Did the fundraiser claim it was a child sponsorship?		Date	*INSERT DROP DOWN]*	N/A	
	RF4	Did the fundraiser continue with the sign-up process after stating cancelling was part of the pledge program?		Time: START-END	*INSERT DROP DOWN]*	FACILTATOR UNSCOREABLE	
	RF5	The fundraiser was observed in a non-fundraising activity whilst in UNICEF branding		Fundraiser tenure	*INSERT DROP DOWN]*	**Target %**	80

Part 1: Pre-Observation

	CHECKPOINT 2: Pre-Observation			
	#	**Checkpoint Item**	**Objective**	**Comments Box**
		How long was the fundraiser observed?	To provide context for the mystery shop	*Record observation time: e.g. 12 minutes*
	0.1	Were the fundraisers working in a site that is not congested and not overcrowded?	To assess logistics management and social distancing protocols	*Note any relevant site dynamics*
		Are there any further good practice pre-observations, general comments or feedback?	Opportunity to capture specifics about fundraising logistics at the particular site	*Note any further observations of value*
0		**TOTAL**		

Part 2: Approach Observation

	CHECKPOINT 3: Social Distancing			
Y/N	**#**	**Checkpoint Item**	**Objective**	**Comments Box**
1	1.0	The fundraiser maintains a minimum distance of [00] meters from members of the public and other fundraisers	To manage social expectation of fundraiser engagement	*Any further comments beyond Y/N?*
0	1.1	The fundraiser does not approach people who are queuing	To prevent a bad practice and a high-risk situation	*Any further comments beyond Y/N?*
		The fundraiser follows appropriate personal sanitization protocol (i.e.		

Part 2: Communication

CHECKPOINT 3: Dialogue

Y/N	#	Checkpoint Item	Objective	Comments Box
	3.0	Did the fundraiser actively and consistently seek to have a two-way dialogue?	To ensure the fundraiser is asking questions and allowing the donor to interact and voice their thoughts and opinions	*Any further comments beyond Y/N?*
	3.1	The fundraiser did not use language that could cause offence		*Any further comments beyond Y/N?*
	3.2	The fundraiser did not make verbal remarks that could be interpreted as aggressive, flirtatious, romantic, or sexual		*Any further comments beyond Y/N?*
	3.3	The fundraiser did not exploit their position for personal gain (e.g. soliciting a job offer or seeking a discount on goods or services)	To monitor compliance and professionalism	*Any further comments beyond Y/N?*
	3.4	The fundraiser did not take a position on political or any issues an on UNICEF's behalf		*Any further comments beyond Y/N?*
	3.5	The fundraiser did not present an opportunity to pledge ongoing support to UNICEF's cause more than three times during a single dialogue after the initial ask	To ensure the fundraiser is not pressuring the donor into a pledge	*Any further comments beyond Y/N?*
	3.6	The fundraiser attempted at least three objection responses to persuade for the sign up	To ensure the fundraiser attempts to persuade donors with a balanced amount of persuasion	*Any further comments beyond Y/N?*
	3.7	Did the fundraiser use at least one accurate statistic?	To ensure the fundraiser has content that is accurate in the dialogue	*Any further comments beyond Y/N?*
	3.8	Did the fundraiser tell an emotive story of human need?	To ensure the fundraiser can use the skill of telling a story within their dialogue	*Any further comments beyond Y/N?*
	3.9	Did the fundraiser demonstrate the scale of the problem?	To ensure the fundraiser is giving perspective of the issue to the donor	*Any further comments beyond Y/N?*
	3.1.1	The fundraiser always finishes with a specific assumptive ask closing statement when conversing	To check the fundraiser ends their intitial dialogue with a strong ask in a way that increases the chances of a donor saying yes	*Any further comments beyond Y/N?*
	3.1.2	The fundraiser stayed silent after the initial close until the mystery shopper spoke first	To ensure the fundraiser create a low pressure dialogue by allowing the donor to think before responding and let them make a decision	*Any further comments beyond Y/N?*
	3.1.3	The fundraiser stayed silent after the close in the multiple objection handles until the mystery shopper spoke first		*Any further comments beyond Y/N?*
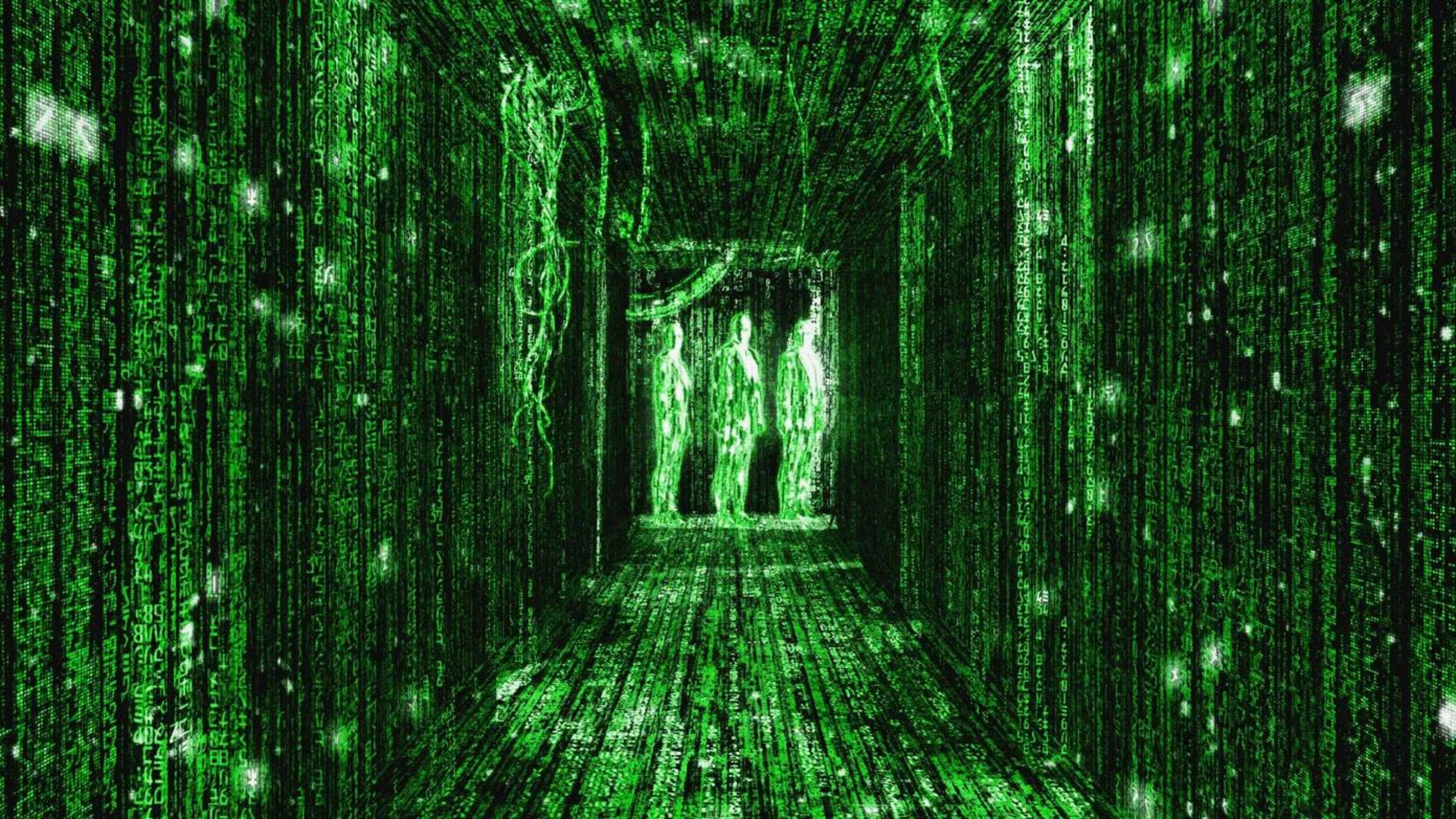
QMS Training Map

SKILLS TRAINING MAP

Stopping

Testing Need	Test Methodology	AES	FSI	CP, GP, EX	Notes?	Stopping Integration Score — Currently Training?	When Trained?	Training Method	Current Document Location	Training — What do create?
									64%	
The fundraiser is standing and actively looking in multiple directions actively seeking donors to approach	Observation checkpoint	☑	☒	🟥		0				
The fundraiser when given a choice is actively selecting where possible the older donor to approach	Observation checkpoint	☑	☒	🟥		1				
The fundraiser is initiating eye contact from an appropriate distance (8-10 meters)	Observation checkpoint	☑	☒	🟩		0				
The fundraiser is turned towards the donor and is a notable presence but does not purposefully block the oncoming donor	Observation checkpoint	☑	☒	🟩		1				
The fundraiser is smiling throughout the approach	Observation checkpoint	☑	☒	🟩		1				
The fundraiser is waving (with palms visible, head height if possible) or gesturing warmly to the oncoming donor	Observation checkpoint	☑	☒	🟩		1				
The fundraiser after the wave or gesture beckons or gestures towards their body and location	Observation checkpoint	☑	☒	🟩		0				
The fundraiser is verbally engaging donors from a distance (at least 3-5 meters away)	Observation checkpoint	☑	☒	🟩		0				
The first initial verbal engagement is an open ended question	Observation checkpoint	☑	☒	🟩		1				
The fundraiser is verbally engaging donors who do not stop at the first ask a second time from at least 1-2 meters away	Observation checkpoint	☑	☒	🟩		1				
The fundraiser delivers a cheerful send off to donors who do not stop	Observation checkpoint	☑	☒	🟩		1				
				Total Checkpoint Integration Items		**11**				

Dialogue

Testing Need	Test Methodology	AES	FSI	CP, GP, EX	Notes?	Dialogue Integration Score — Currently Training?	When Trained?	Training Method	Current Document Location	Training — What do create?
									100%	
Did the fundraiser actively and consistently seek to have a two-way dialogue?	True statement question	☑	☑			1				

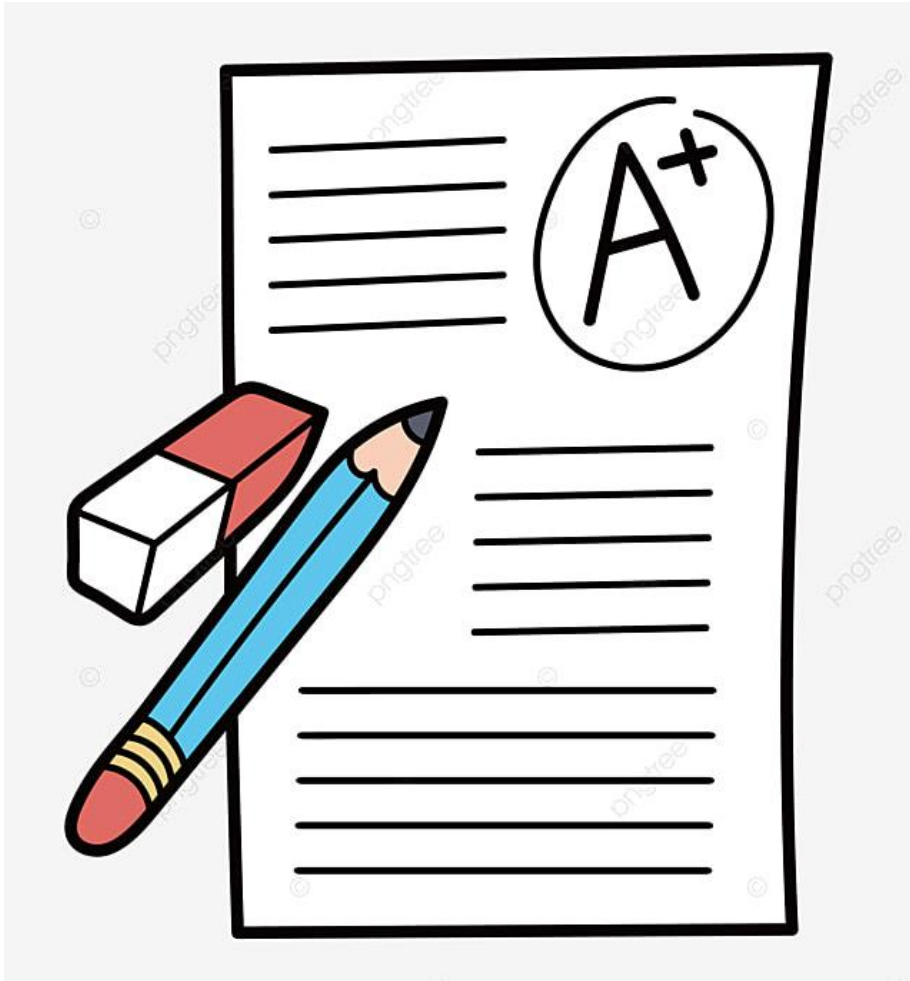FSIS (Template) | AES (Template) | Tr. Map1 (Code-Guidance-Strat) | **Tr. Map2 (Skills)** | KB1-KS1-Code | KB1-KS2-Guidance | KB1-KS3-F2F Fundraisin ...

Quality Control

2 ways to test knowledge + behavior:

1. Fundraiser Support Interviews
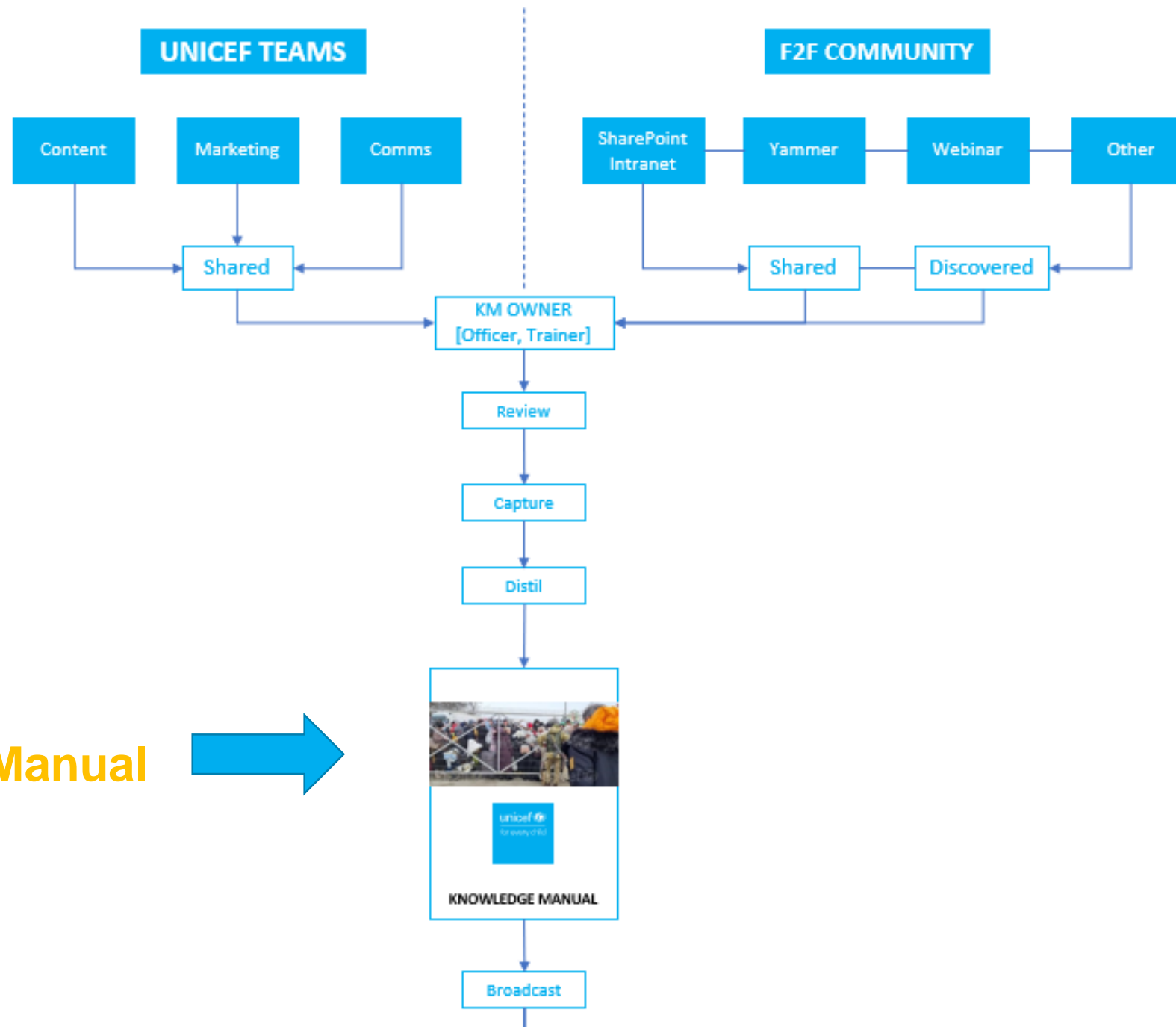2. Audience Experience Score

Knowledge Management

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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F2F KNOWLEDGE MANAGEMENT SYSTEM

UNICEF TEAMS

- Content
- Marketing
- Comms

→ Shared

F2F COMMUNITY

- SharePoint Intranet
- Yammer
- Webinar
- Other

→ Shared → Discovered

KM OWNER
[Officer, Trainer]

↓

Review

↓

Capture

↓

Distil

↓

Digital

Knowledge Manual →

KNOWLEDGE MANUAL

↓

Broadcast

Éducation

Nutrition

Santé

Protection des enfants

WASH
(Eau, Assainissement et Hygiène)

VIH/sida

Inclusion sociale

Notre action se résume simplement par :

« Sauver, Protéger, Éduquer les enfant les plus vulnérables, partout et toujours! »

L'UNICEF est le principal porte-parole des enfants à travers le monde et la principale source de données et d'informations sur la situation des enfants dans le monde.

SOMMAIRE

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pour chaque enfant

GUIDE DU MÉDIATEUR
EN FACE À FACE POUR L'UNICEF

UNICEF France - Guide de mediateur

Compliance, Good Practice Excellence

Checkpoint Behavior	Testing Need	Dialogue			CP, GP, EX
		Test Methodology	AES	FSI	
1	Did the fundraiser actively and consistently seek to have a two-way dialogue?	True statement question	☑	☑	(green)
2	The fundraiser did not use language that could cause offence	True statement question	☑	☑	(red)
3	The fundraiser did not make verbal remarks that could be interpreted as aggressive, flirtatious, romantic, or sexual	True statement question	☑	☑	(red)
4	The fundraiser did not exploit their position for personal gain (e.g. soliciting a job offer or seeking a discount on goods or services)	True statement question	☑	☑	(red)
5	The fundraiser did not take a position on political or any issues an on UNICEF's behalf	True statement question	☑	☑	(red)
6	The fundraiser did not present an opportunity to pledge ongoing support to UNICEF's cause more than three times during a single dialogue	True statement question	☑	☑	(red)
7	The fundraiser attempted at least three objection responses to persuade for the sign up	True statement question	☑	☑	(red)
8	Did the fundraiser use at least one accurate statistic?	True statement question	☑	☑	(green)
9	Did the fundraiser tell an emotive story of human need?	True statement question	☑	☑	(green)
10	Did the fundraiser demonstrate the scale of the problem?	True statement question	☑	☑	(green)
11	The fundraiser always finishes with a specific assumptive ask closing statement when conversing	True statement question	☑	☑	(green)
12	The fundraiser stayed silent after the initial close until the mystery shopper spoke first	True statement question	☑	☑	(orange)
13	The fundraiser stayed silent after the close in the multiple objection handles until the mystery shopper spoke first	True statement question	☑	☑	(orange)
14	The fundraiser spoke without any hesitations	True statement question	☑	☑	(orange)

2 ways to test knowledge, skills, and behavior

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QMS Step 2 – Fundraiser Support Interviews

FSI Process

STEP 1: Pre-Steps

| Brief | Review | Schedule | Practice |

STEP 2: Skills and Knowledge Capture

| Role Play | Interview or Quiz |

STEP 3: Transcription [Optional]

Production

STEP 4: Score

| Review | Analyze |

STEP 5: Report

| Quantify | Track |

STEP 6: Feedback

| Positive | Corrective | KPI | Track |
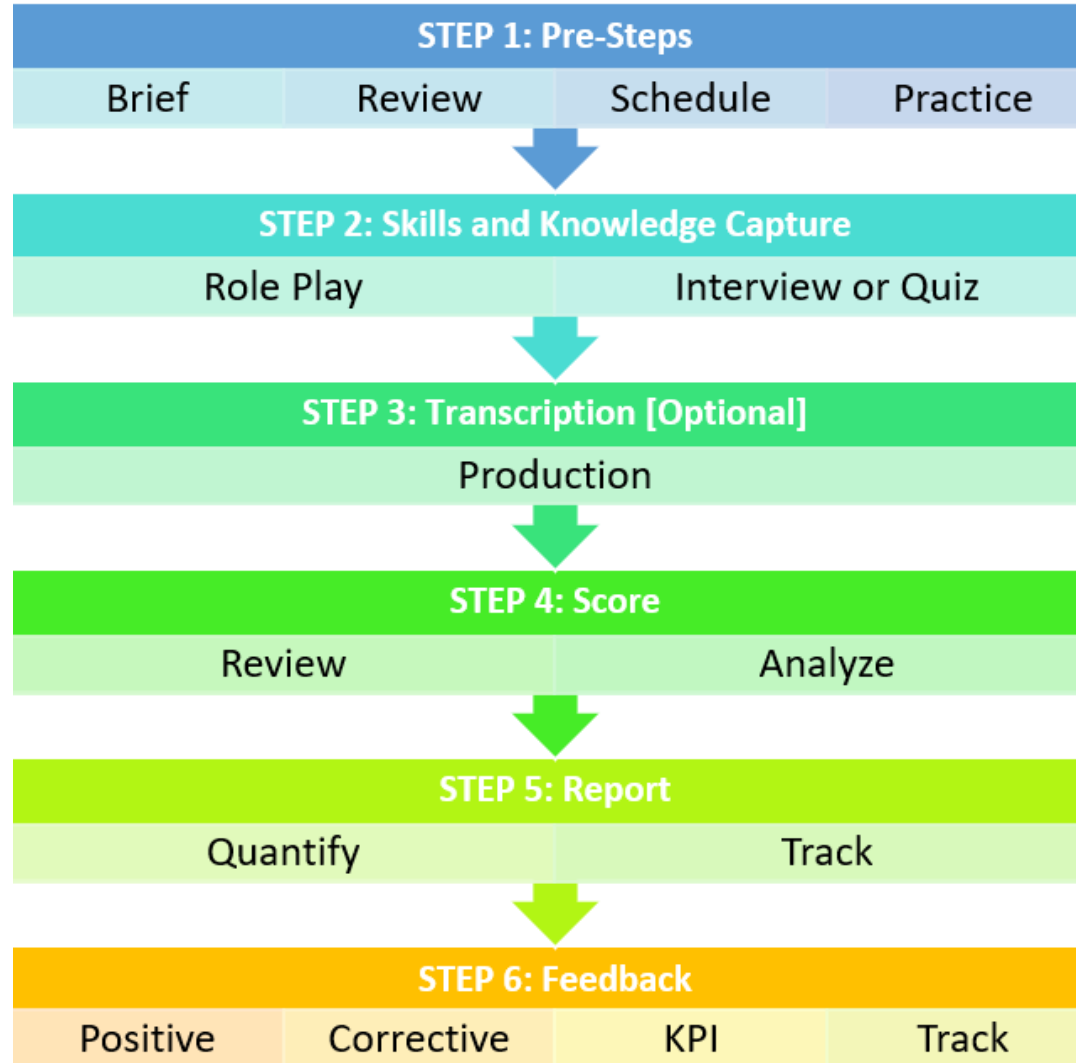
- Audio capture
- [Optional] Transcript

- Test knowledge and skills you **cannot capture** in a mystery shop

- Quantify e-learning F2F knowledge to ensure **knowledge is fresh**

- Sub channels: **Door to Door**

- More **detailed analysis,** more **flexibility**

- Facilitated by **F2F skilled managers** or trainers

- No mystery, but **less cost**

- Produces **valid quantified quality metrics**

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QMS Step 2 – Audience Experience Score (Mystery Shopping 2.0)

What have we learned since markets started to integrate the QMS?
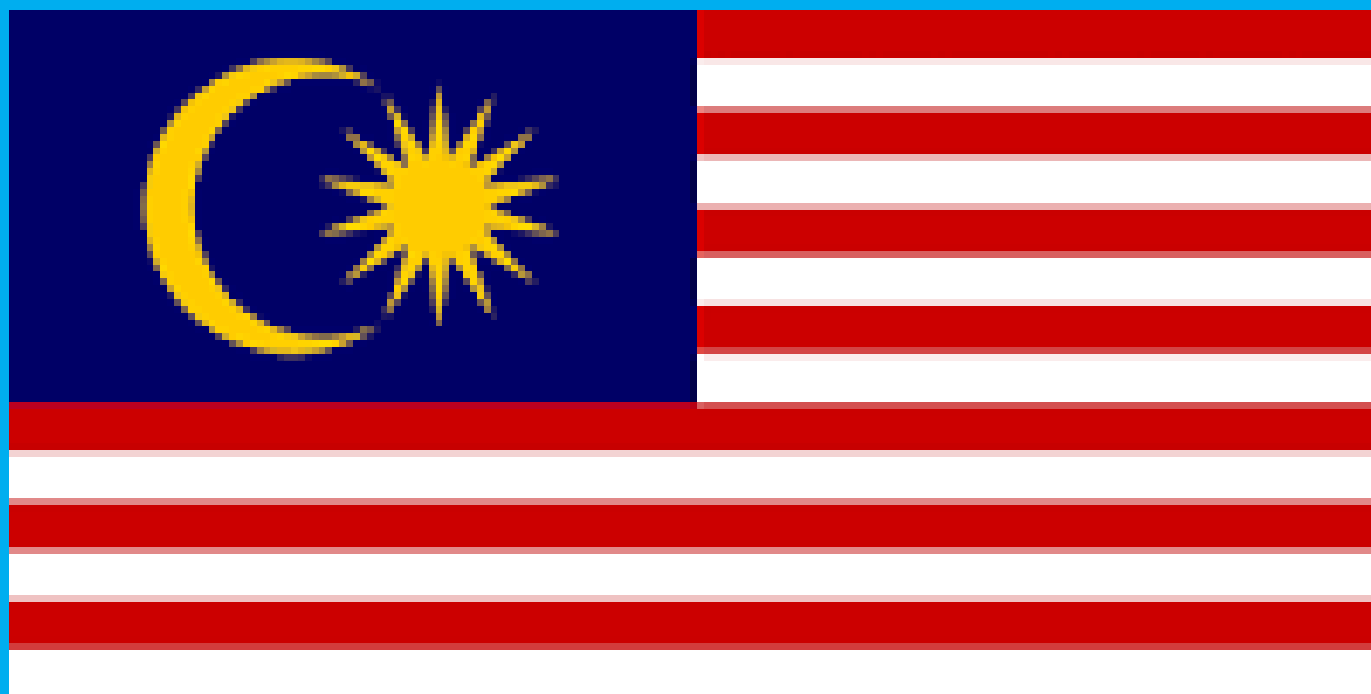
Management & Resourcing

- Who can facilitate the QC process?

- Who will process the results?

- Who will deliver the feedback to the fundraisers?
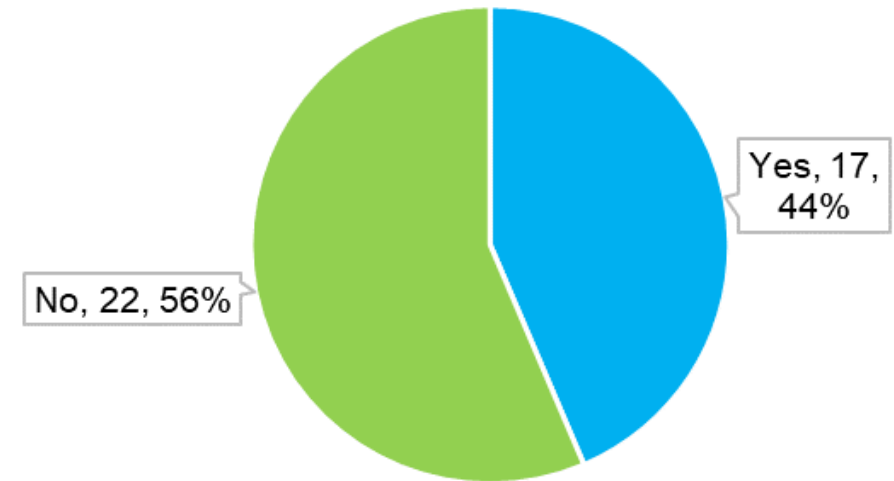
Do you currently use mystery shopping as a method of quality control ?

BIG F2F Survey 2023

Do you currently use mystery shopping as a method of quality control?

Yes, 17, 44%

No, 22, 56%

Saddle

Handle Bars

Brake Hoods

Levers

Seat Rails

Seatpost

Seatpost Clamp

Top Tube

Brake

Brake Cable

Head Tube

Adjusting Barrel

Brake Pad (shoe)

Seat Tube

Down Tube

Fork Crown

Seatstay

Bottle Cage

Valve Stem

Cassette

Front Derailleur

Fork Blade

Spoke

Hub

Rear Dropout

Pedal

Front Dropout

Rear Derailleur

Crank Arm

Wheel

Crankset

Rim

Chain

Chainring

Tire

Chainstay

Get on your bikes and ride!

Freddie Mercury

Questions / discussion

Thank you.

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QMS Algorithms

If	Then
If you want to run optimized quality control,	then you need to define your universal standards
If you want to implement universal standards,	then you need to train all your fundraisers on the standards
If you want to test your fundraisers in a QC process	then you need to have trained them on everything you will be testing them on
If you want to further professionalize & constantly optimize your fundraiser and donor experience	then you need a clear, accessible system and structure in place that provides a quantifiable result that enables constant feedback to be used for further iterations and optimizations