

Supercharge Sustainer Retention from Face-to-Face Fundraising

Part One of a Two Part Guide: Boosting Donor Retention From Day One – Top 10 Tips for Professional Fundraising Agencies

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Introduction

Face-to-face fundraising is one of the best ways to inspire people to make an ongoing and sustained donation. You may also hear terms like canvassing, street, F2F, door, etc. All mean that skilled face-to-face fundraisers are working across the USA every week connecting thousands of new sustainers to make ongoing scheduled gifts to a range of different Non-Profit Organizations (NPOs).

Keeping the connection with new sustainers and making sure that their gifts keep coming in for the long-term can be a challenge, but it's solvable. The longer that connection can be maintained – the higher the lifetime value to the NPO.

So, what's the best approach to maximize sustainer retention? This question was discussed by over twenty experts in face-to-face fundraising during a recent Professional Face-to-Face Fundraising Association (PFFA) Work Group meeting. This has been an ongoing project for PFFA members and participants since 2017 and we have the results of these discussions.

The PFFA is the self-regulatory association for organizations utilizing or working in and with face-to-face fundraising approaches and has more than twenty-five member organizations including NPOs, Professional Fundraising Agencies (PFAs) and affiliate service providers.

The PFFA has organized Work Group meetings three times a year since 2015. These Work Groups are a chance for sector experts to meet and to find ways to improve face-to-face fundraising in ways that are beneficial to non-profits and sustainable. A key strength of the PFFA is the sharing of best practice – which allows for much wider knowledge and experience contributed than any single organization can provide on its own.

At the Work Group sessions covering this topic, PFAs focused on how to increase sustainer retention from the point at which the face-to-face fundraiser has their first conversation with a potential sustainer. Their top-ten practical steps to boost retention on first contact are:

1. Recruit the right face-to-face fundraisers

Before anything else, it's critical to find the right people. Passion, integrity, effective communication skills and a connection to the cause are perfect attributes as well as the ability to be resilient and remain professional and positive. Top PFAs know this and invest resources to engage face-to-face fundraisers with those organizations they're most passionate about. Robust screening, vetting and interviewing processes with appropriate credential and background checks is an important component in staff recruitment.

2. Educate your face-to-face fundraisers

It is important to understand and be able to convey to staff the Key Performance Indicators (KPIs) for sustainer recruitment. These KPIs may vary by campaign but most likely, the KPIs a face-to-face fundraiser can impact are closely related to average donor age, method of making payment, frequency of ongoing payment and other demographics. When a PFA cultivates a higher level of understanding around these indicators, they understand that this will increase the value of their work for the cause they are representing.

Staff training around mission-related work of the campaign is equally as important. Initial and regular ongoing training involving both the NPO and the PFA are likely to be most effective in ensuring accurate, up-to-date messaging from the fundraising team, and individual face-to-face fundraisers.

3. Incentivize quality acquisition

Face-to-face fundraisers have a hard job. Providing them valuable incentives will not make the job easier but rewarding positive behavior and action will lead to a culture of the same. Effective incentives will balance the importance of a clear message to face-to-face fundraisers to focus not only the quantity of acquisition but, more importantly, the quality. These most often financial or connected to the cause, but could be part of growth, travel or professional advancement opportunities. A great way to provide a full and encouraging incentive program for face-to-face fundraisers is to partner with NPO clients to provide maximum impact.

4. Provide impactful training

If you want your face-to-face fundraisers to inspire people, then they need to be inspired and emotionally connected to the campaign organization and the mission. And like any professional, they should feel valued and respected for their professional contribution to office goals, as much as overall mission. In order to provide effectual training, it must be regular and ongoing so materials and talking points can adjust as current events within the campaign do and the face-to-face fundraisers can rely on these training sessions to keep their knowledge base fresh and up to date.

Face-to-face fundraisers are live story tellers, so the best training is created with that in mind. Effective training materials are likely to include personal stories and information that will allow the fundraiser to make a personal and impactful connection with sustainers upon first contact. Fundraiser training is most effectual when it includes videos, pictures and stories from those who deliver or implement the mission-related work.

5. Prioritize the appropriate age group for targeting

There is value in all donors to a worthy cause, of course. However, data from established face-to-face programs shows that more mature people tend to keep their donations going longer than younger people. This is one of the most important factors in sustainer longevity. All sustainers want to give but it should make sense that those who are more able, will do so longer. In part, this is due to the likelihood that people become more financially stable over

time and become more able to keep a regular and ongoing commitment than when they are younger with a less stable or established income.

With this information, PFAs can build incentives, training and performance management modules to ensure face-to-face fundraisers understand why they should target a more mature demographic, when possible, and how to do so most effectively.

6. Pitch confirmation and disclosure

It's important to make sure that new sustainers understand and agree to the commitment they are making. In some states and municipalities, this can even be required by law. Face-to-face fundraisers should read a disclosure or pitch confirmation that explains the gift amount, frequency and how long the expected commitment is for the campaign prior to submission of an electronic pledge or transaction.

7. Variable asks and giving frequencies

Make it as easy as possible for someone to give the way that suits them best by having a range of different gift amounts, payment types and giving frequency. There is data to support that allowing sustainers to give their ongoing gift on the same day each month, increases retention because it makes it possible for sustainers to plan for that gift, the same as any recurring subscription or service. The most common giving frequencies are monthly, quarterly, semi-annual and annual, although some organizations offer a weekly option, as well.

8. Program security and integrity

Ensuring the tablet technology and mobile platform adhere to the highest standards of data capture and storage contributes to retention on the front-end during acquisition. With the entire process being automated, and often utilizing high standards of encryption which may require compliance with the PCI-DSS Standard, sustainers are most at ease when making a donation and pledge to the non-profit of their choice in an easy and safe process.

The biggest impact on retention is the checks and balances on fundraiser activity within the mobile technology to check for duplicate demographic data, payment methods, phone numbers and/or other financial details. This ensures integrity of front-end process as an added layer to the fundraiser recruiting and training. Hope for the best, but plan for the worst. Make sure your program has in-built checks for fraud to verify age, email address and pre-paid credit cards. This should be built into the electronic platform but also strengthened with effective mystery shopping.

9. Welcome/Verification Calling

Face-to-face fundraisers make a strong emotional connection with new sustainers. This feeling is strengthened the most with a call that is closest to the acquisition date as possible. There is no substitute for a genuine "thanks" for sustainers and this can be accomplished many ways but is thought to be most effective when done early – the earlier the better. The welcome call also allows the sustainer to share their experience with their face-

to-face fundraiser and provide feedback that can prove to valuable insights for program betterment.

Although verification calling has a separate purpose of confirming donor details and commitment, these calls should have a genuine "thanks" built into the call script, as well. And much like welcome calling, verification calling is most effective when done early.

10. Appropriately set sustainer expectations

Setting accurate sustainer expectations at the time of engagement is vital to protecting the connection they felt to the cause they were originally inspired to support. Effective and transparent communication of what a donor can expect from their new favorite organization must match what the non-profit is able to deliver on the back-end.

Any commitments made by the face-to-face fundraiser surrounding communication preferences, recurring payment date, receipt delivery, ability to cancel or adjust donation amount, or contradictions in mission or brand shared with the sustainer at the time of sign-up must match information provided in the first new sustainer communication. A failure to synchronize messaging through an integrated campaign approach will likely weaken, if not dissolve, new sustainer support before it has time to be cultivated.

It is not always the case that PFAs or NPOs are able to implement each of these components prior to the launch of a face-to-face campaign, however, it is worth noting that the more of these top 10 quality drivers you have in place, the better. A great comfort for most NPOs is to know that most, if not all, of these services can be provided by your PFA of choice or an affiliated service provider so having the front-end quality drivers in place, may be a lighter lift than expected.

If you'd like the opportunity to participate in future Work Groups and learn about the range of other specialized benefits, PFFA membership is critical to making your face-to-face program a success. More information – find out more at www.pffaus.org or by emailing: info@pffaus.org.