The Professional Fundraiser

INDIVIDUAL GIVING CONFERENCE

Unlocking F2F Performance

Partnerships, KPIs & Scalable Growth

About Me

Kelvin Hopkins, Founder & CEO

With more than two decades of experience in the fundraising sector, specialising in **Individual Giving and Face-to-Face Fundraising,** I'm an accomplished industry leader, speaker, and founder.

Before founding The Professional Fundraiser, I held several senior leadership positions across leading fundraising agencies. I have also contributed directly to shaping industry standards during my tenure as **Trustee and Vice Chair of the Chartered Institute of Fundraising.**

Since launching The Professional Fundraiser (TPF) in 2012, I've grown the organisation into one of the sector's most established agencies. **TPF serves as a trusted partner to major charity clients including Cats Protection, The Royal British Legion, Alzheimer's Society, Erskine Veterans Charity, Macmillan Cancer Support and Prostate Cancer UK.**

Under my leadership, The Professional Fundraiser has earned a strong reputation for exceptional donor quality, high compliance standards, and long-term partnerships with charity organisations.

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Some truths…

I’m not a fundraiser

I think about human psychology, leadership and strategy (people and process) and apply this to the F2F fundraising approach.

I’m agency side

I see things from the agency perspective, and these are my observations of the sector now, and over the last 20 years. In a world shaped by diversity of thought, seeing things differently and through an agencies eyes may help to answer some questions, and give a wider perspective.

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A QUICK POLL

Are you...

- Unfamiliar with F2F
- New to F2F
- Familiar with F2F but not running an active campaign
- Running an active campaign and things are going well
- Running an active campaign that requires improvement
- Other

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Today's Session

How to cultivate **trust and transparent relationships with an agency partner**

What are the **key metrics** to ensure quality driven and scalable campaigns

How to **deliver excellent attrition from the first day** of the donor relationship

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Use the **chat feature** to ask any questions or share any thoughts/comments as we go through

How to **cultivate trust & transparent relationships** with an agency partner

Learning #1

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Finding the right partner

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What are these questions telling you?

Who has capacity?

Who has a proven track record of delivering volume?

What is the agency's account management structure?

What is the cost?

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These tell us their **relationship status**

These are just a health check

How do you **train your fundraisers**?

How do you **secure donor data**?

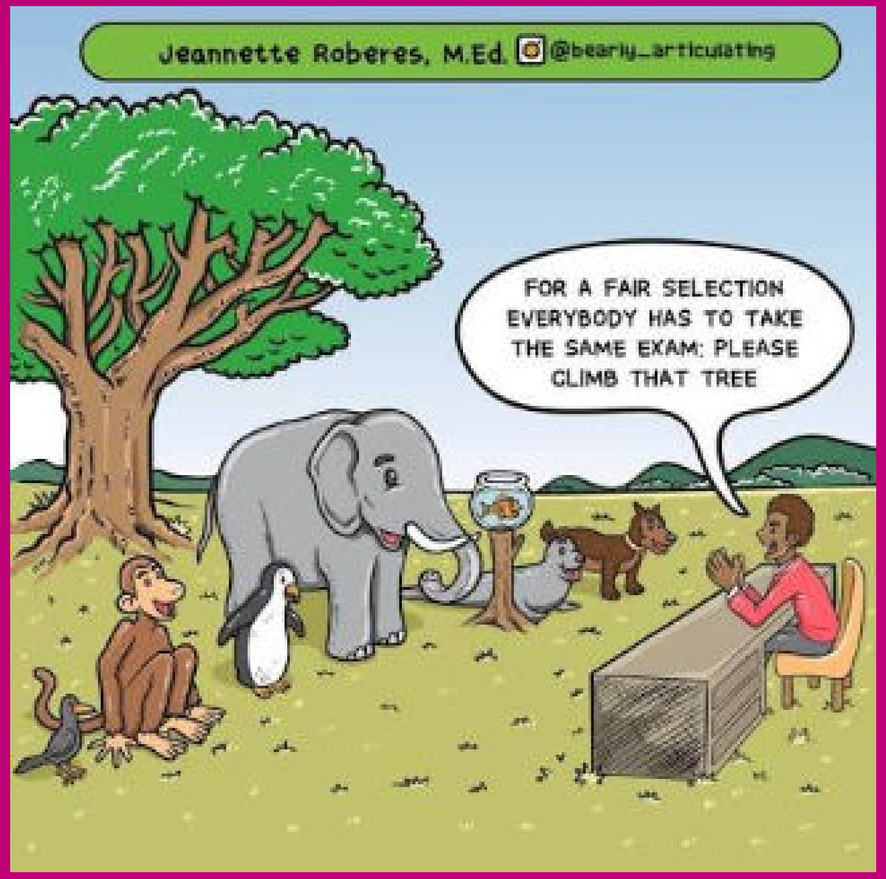
Which **venues and locations** do you have access to?

What are your **clawback arrangements?**

Can you share any **case studies?**

Are you **members of the Fundraising Regulator** and the CIoF

All of this is **due diligence** - it's not what makes a partnership



Appreciating that each agency is different.

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What's **your edge?**

Your campaign will never be successful if it isn't competitive within an agency's portfolio

Why would a fundraiser want to work on your campaign over that of another charity?

Be a big fish in a small pond.

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How do we go **beneath the bonnet?**

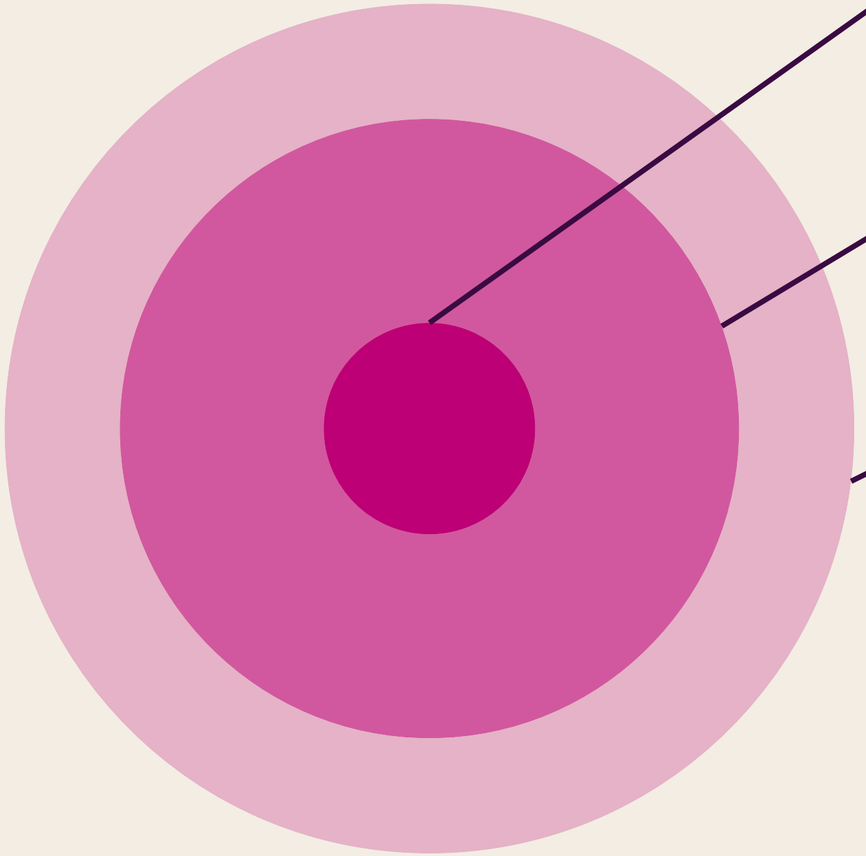
What type of F2F activity do you deliver?
Is our charity brand strong enough to work in these environments?

What is the demographic of your fundraisers?
How well will an agency's fundraiser demographic connect with our supporters?

What are your USP's as an agency?
Does what matters to you and how you operate, truly matter to us?

What is this agency's culture
(the way things are really done)?
Will we respect this, or will we seek to manage it our way?

Who's in **control?**



Circle of control

What we can directly control

Circle of influence

The concerns we can do something about

Circle of concern

Wide range of concerns

Everything else

What we cannot control or influence, we need to release

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Circle of Control

Charity

- Your brand - **the living experience that people have with your organisation**
- Brand awareness and perception
- The product(s)
- Fundraising materials
- Messaging and what should be told
- Donation values

Agency

- Fundraising locations
- The fundraisers
- Phasing and scheduling
- What is actually told
- Donation values

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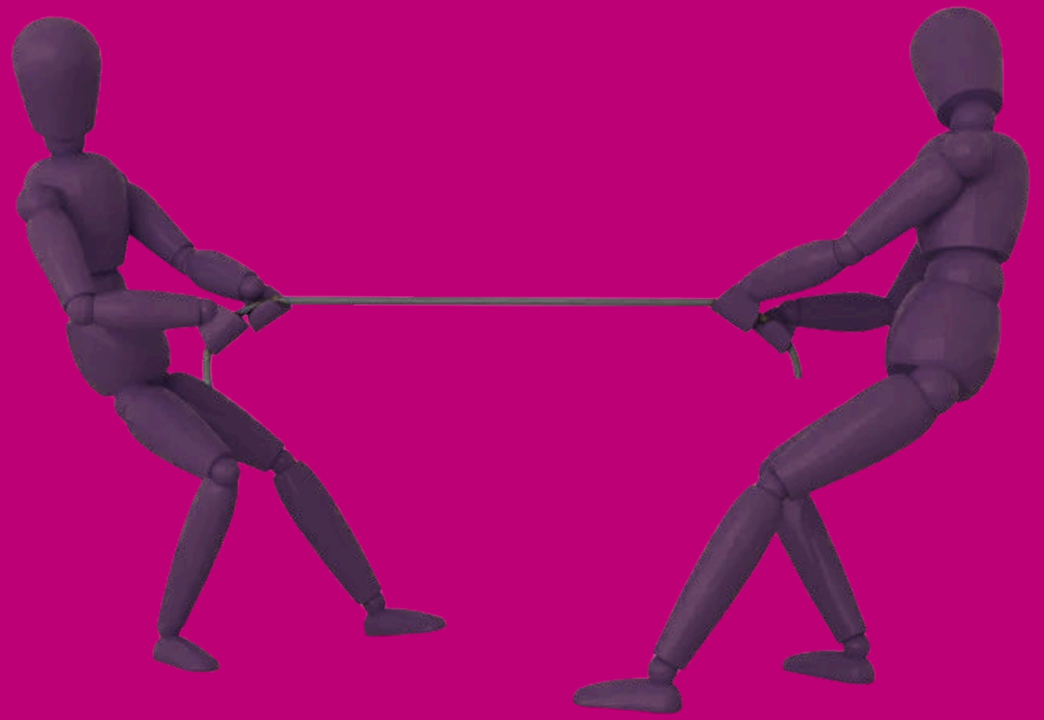
Finding **alignment**



How well do we understand the issues on the ground,
and how committed are we to resolving these together?

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What are the **key metrics** to ensuring quality driven and scalable campaigns?

Learning #2

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The **key metrics**

Fundraising is a formula

Fundraising days x Efficiency = Gross donors
Fundraising days x Efficiency x Retention rate = Net donors

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The single **most important KPI**

Who knows this for their campaigns?

The number of donors recruited per fundraiser, per day

Fundraiser Efficiency or
Fundraiser productivity

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Fundraiser **efficiency drives everything**

What goes **up**

- Volume of donors
- Fundraiser engagement
- Fundraiser attraction
- Opt-ins
- Volume of potential venues (private site)
- New territory: venues and fundraiser willingness to travel
- Agency’s gross profit and therefore appetite to scale with you!
- Your ROI through potentially higher ADV and improved attrition

What comes **down**

- Costs per donor (for the agency)
- The number of cost prohibited sites
- Attrition
- Fundraising days
- Recruitment need
- Venue saturation that in turn increases future efficiency

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The **recruitment** trap

1

We need more fundraisers

2

We need to work with another agency to scale

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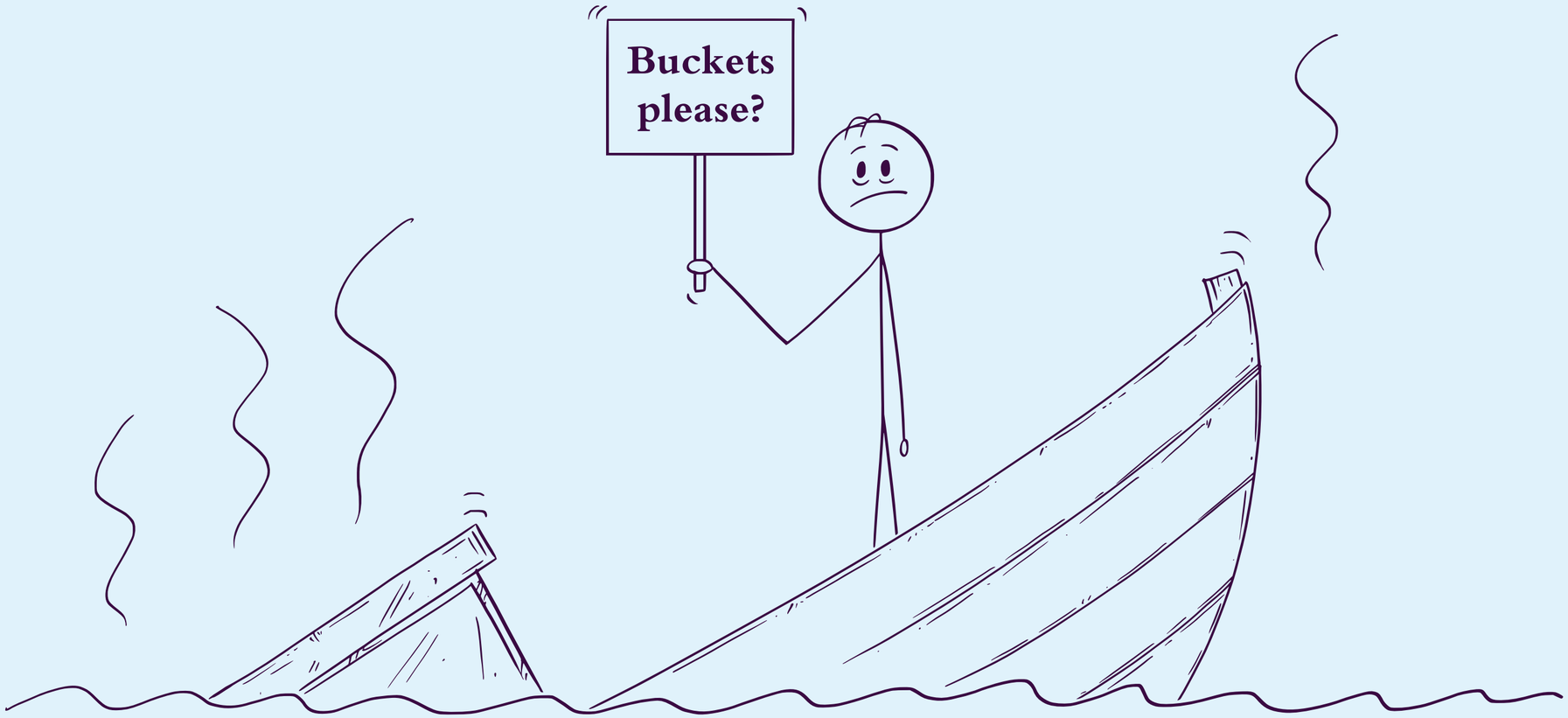
Work **Smart,** Not Hard

- ***“Leverage creates longevity; force creates fatigue.”***



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VOLUME METRICS

A weekly health check

Efficiency
Fundraiser days

ATTRITION METRICS

Supporter ages (donors over 45)

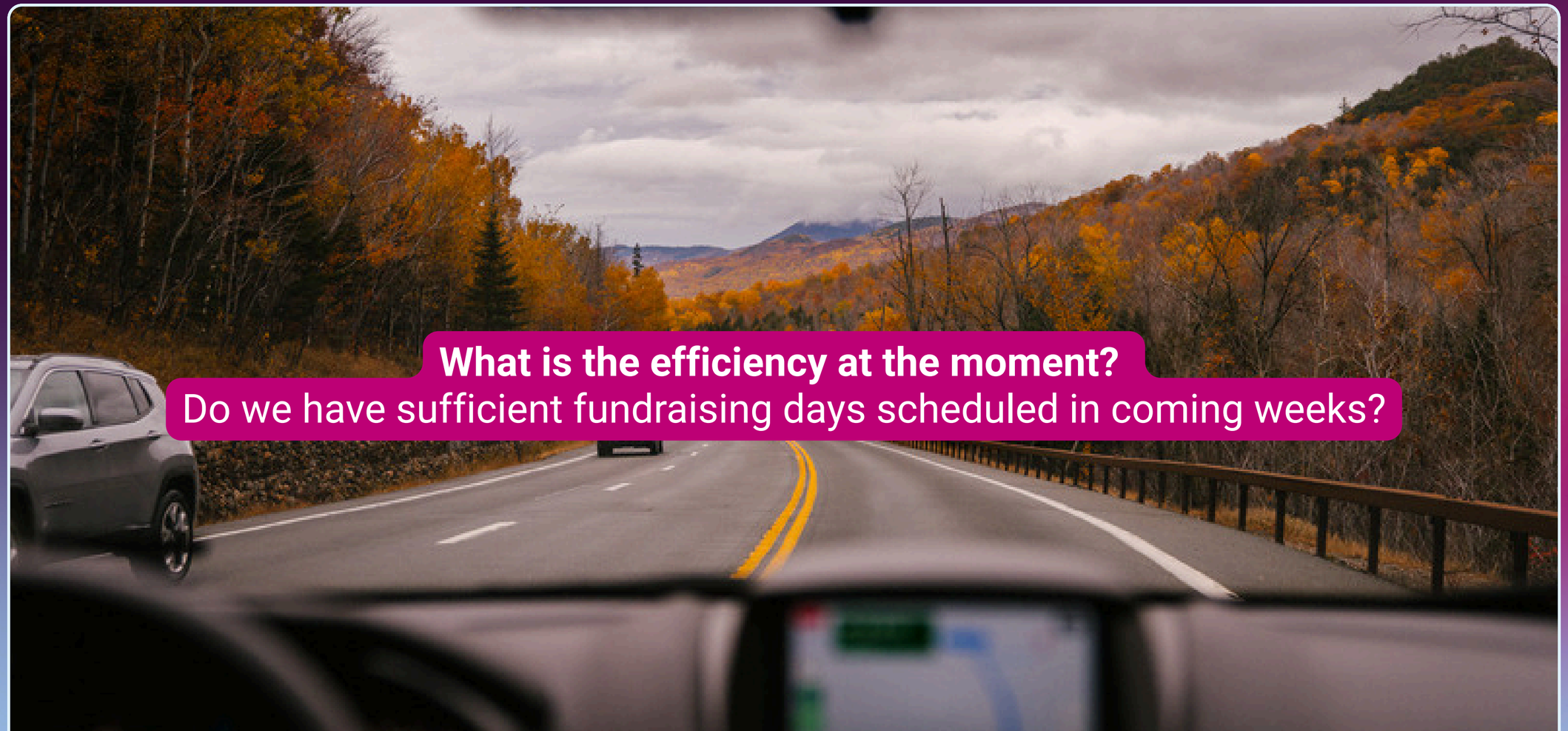
Welcome call penetration

Donation values

Gift aid

How are we **framing** conversations?

How are we **framing** conversations?



Ask the **5 whys?**

We're short on fundraising days

WHY #1

Because we don't have **enough fundraisers**

WHY #2

Because we're **losing fundraisers** from off the campaign

WHY #3

They're preferring to go onto **other campaigns**

WHY #4

They're **struggling to sign up donors** on your campaign

WHY #5

Feedback is: the donation amount is too high. The script isn't working. The don't have the right equipment. People just aren't interested.

Structuring **Client-Agent** Meetings

REFLECT

Reflect on the positives from the previous weeks, on both sides

HEALTH CHECK

5-10 weekly KPIs, the health check score, is the campaign on-track?

IDS

Identify, Discuss, Solve, look at what consistently not on-track, and invest the time identifying the root cause, then discuss and solve together.

Deliver **excellent attrition** from the first day of the donor relationship

Learning #3

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People & **Process**

People

“Culture eats strategy for breakfast”

The culture, how things are really done

What’s the strategy?

"Strategy is about precision, not probability”

If you are waiting to see what sticks, you are just engineering higher future attrition rates.

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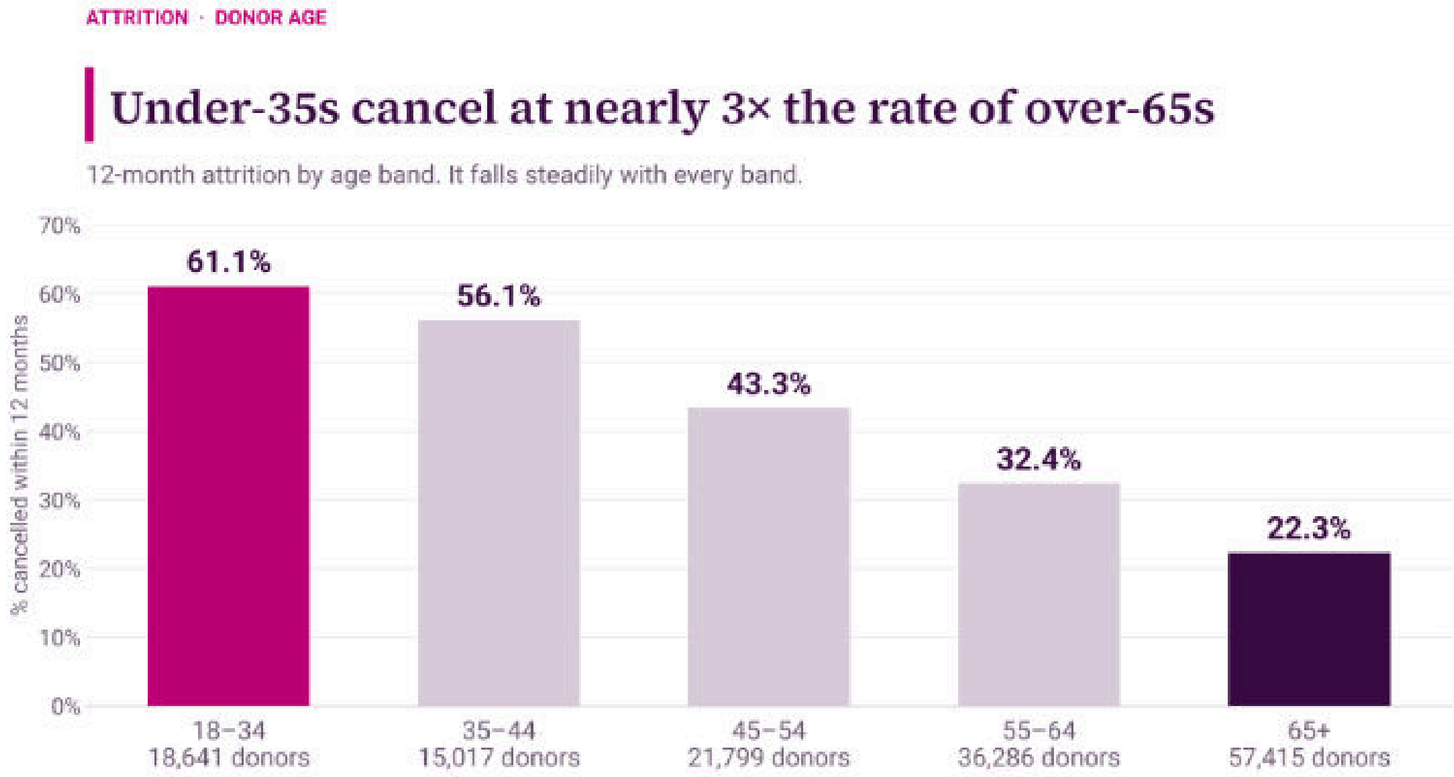
What impacts attrition?
Our insider experience



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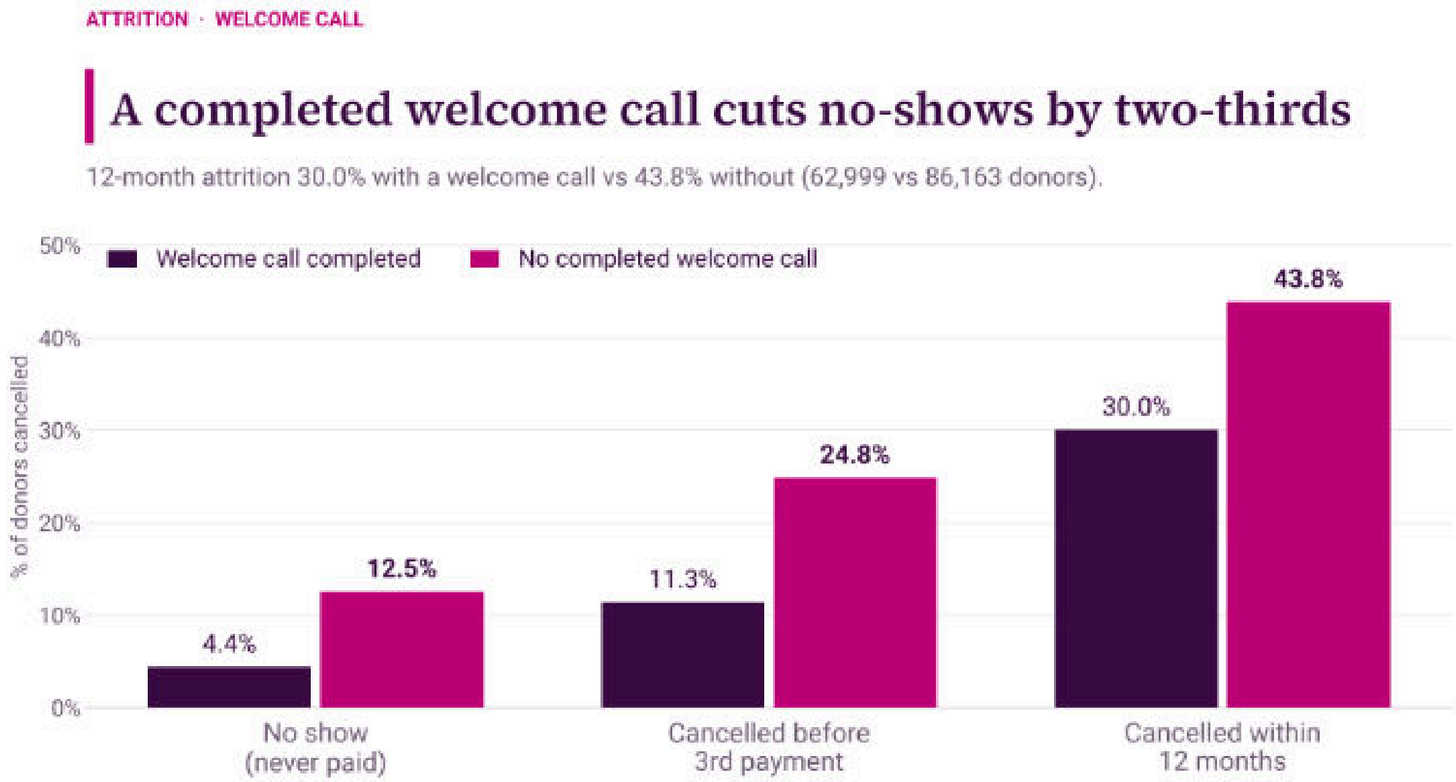

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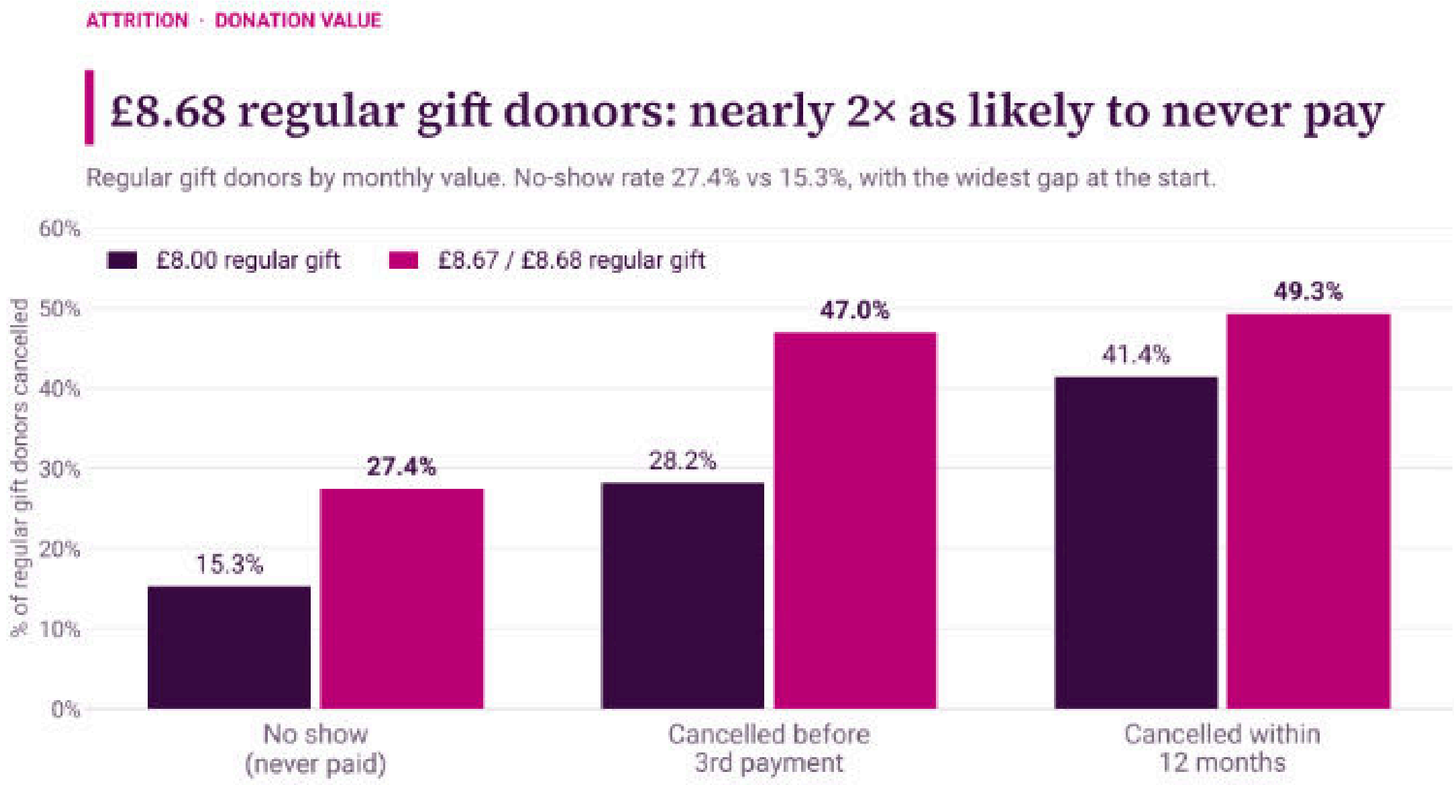

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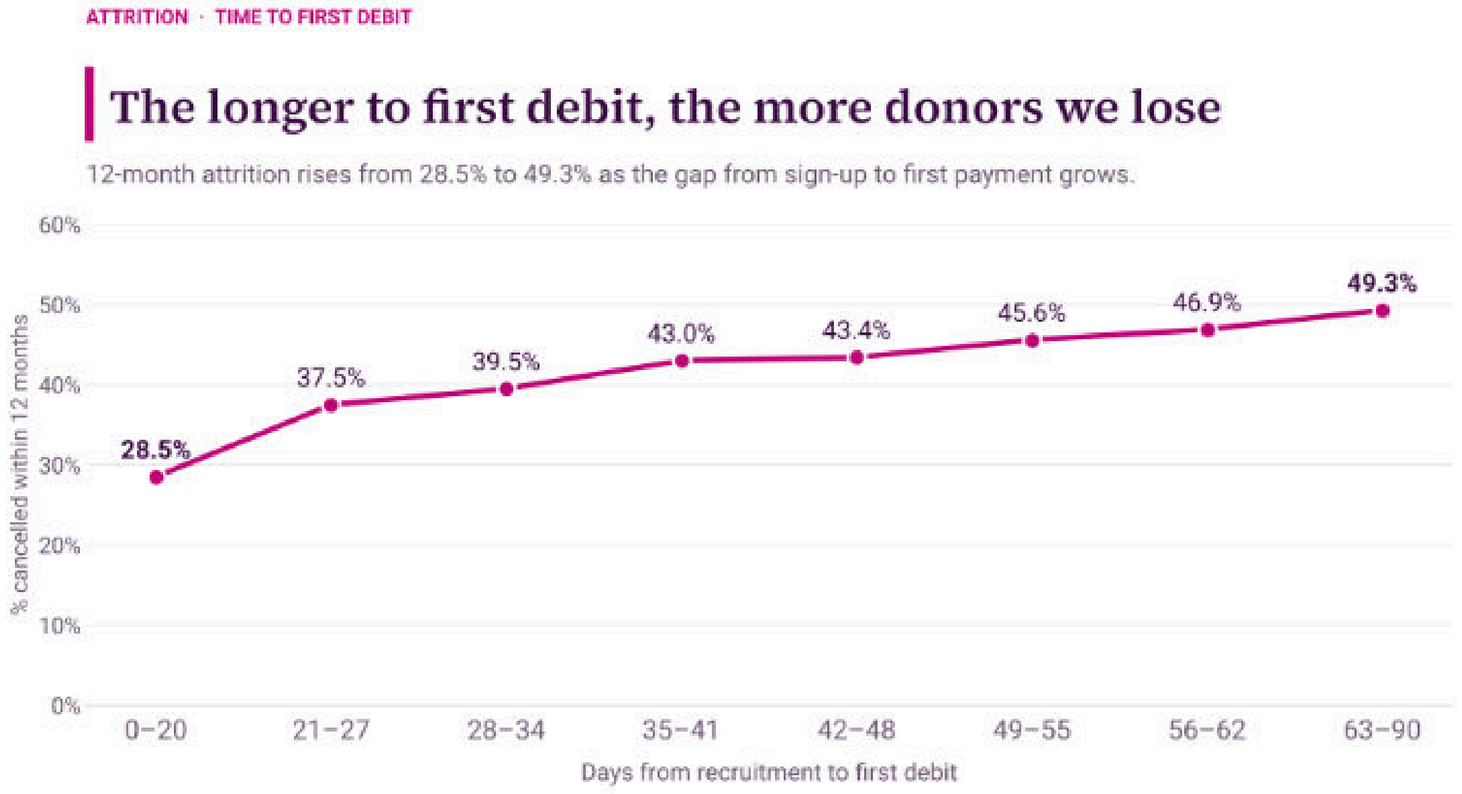

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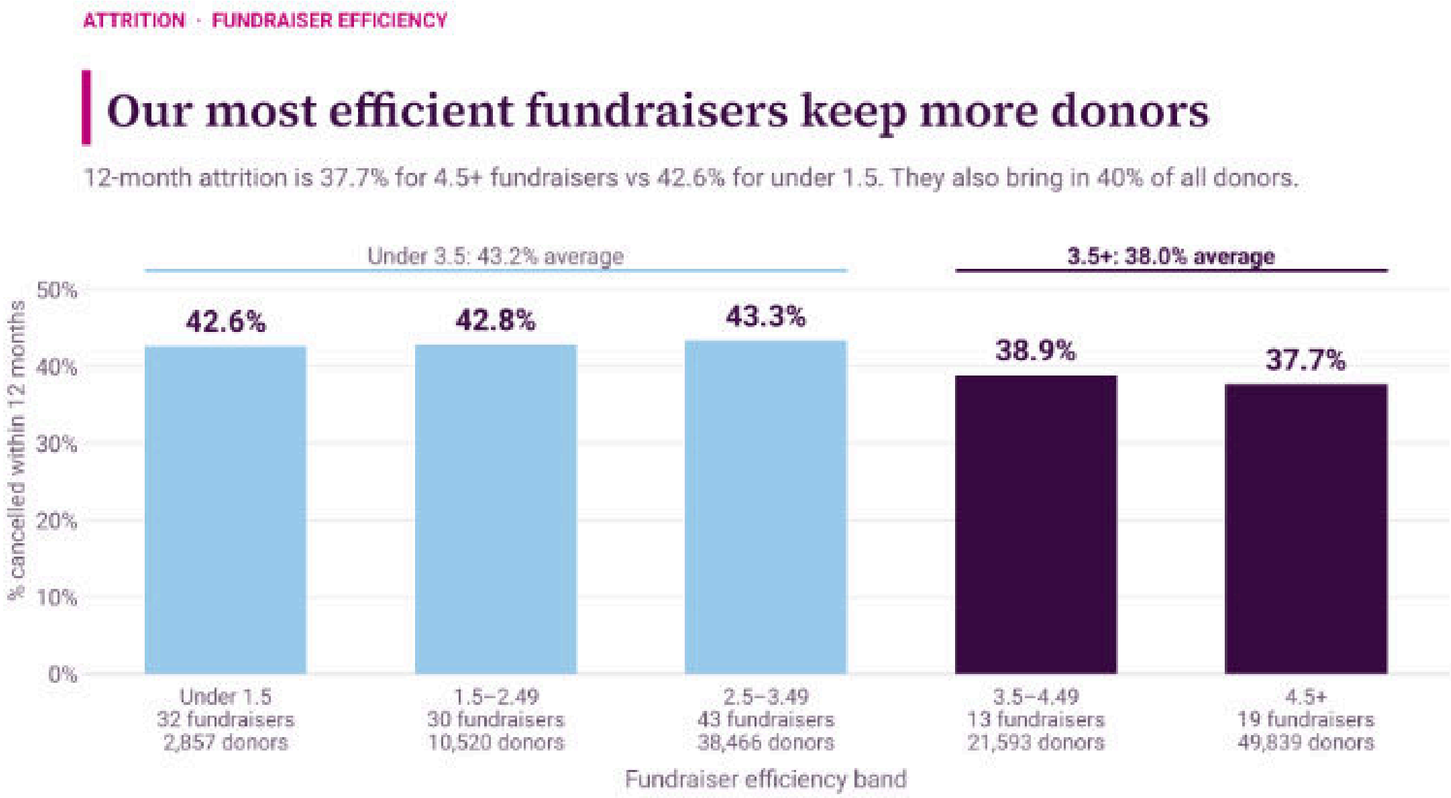

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SUMMARY

Key Takeaways

How do we foster a strong agency partnership?

It starts with the right partner. After this, it’s about understanding the issues on the ground and committing to resolving these together.

How do we ensure a sustainable and scalable campaign?

Efficiency drives everything - it’s the number one KPI you need to be talking about

How do we deliver improved attrition?

“People & Process” and you need to be delving deep into the data - what you do from day one, impacts throughout the lifecycle of the donors donation.

Thank you

Meet me in the networking room

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