



the fundraising partnership

Code of Professional Conduct

Detailed codes of practices and policies to be followed and adhered to.

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Principles & Fundamentals

Status of this code

All charitable fundraising in the UK is governed by the Fundraising Regulator – an independent body that regulates fundraising across the charitable sector in England, Wales and Northern Ireland.

They set and maintain the standards for charitable fundraising in the Code of Fundraising Practice to ensure that fundraising is legal, honest, open and respectful to the public. This is a minimum set of guidelines every charity and agency representing them **MUST** follow.

At The Fundraising Partnership we believe in excellence and exceed these minimum requirements to ensure the best possible experience for our charity partners and their supporters.

This Code of Professional Conduct governs the way we operate in the field in all locations and is part of our **fundraising promise** to the charities that we work on behalf of. It also forms an appendix to our employment contract for all staff and breaches of it are regarded as potential disciplinary offences. All fundraisers are fully trained and tested against these standards and inspected regularly. They incorporate and elaborate on and exceed the IoF standards and regulations. It also includes our Sensitivity & Vulnerable Persons Policy designed to safeguard vulnerable people, ensuring we do right by supporters who need an extra layer of care.

Overall Standards

1. Our work is regulated by the Institute of Fundraising and the Fundraising Regulator. These organisations lay out the rules of fundraising, which we must adhere to.
2. Lotteries are a form of gambling so we must also follow guidelines set out by the Gambling Commission.
3. There are also other aspects of fundraising which must be carried out correctly to comply with the law.
4. Beyond that as part of The Fundraising Partnership you must exceed these minimum legal requirements and work to the highest standards in our industry and commit to best practice for the benefit of the good causes we are proud to represent.

5. This is what makes up our Code of Professional Conduct and this is the basis of The Fundraising Promise we make to the charities we work on behalf of and the members of the public that we engage with.

To support The Fundraising Partnership fulfil our fundraising promise to our charity partners, we have a robust Quality Assurance process, outlined in section D. An essential part of fulfilling this promise is our commitment to giving all our fundraisers the support they need to deliver excellence. We check your work because your work really matters to us, to our charity partners, the regulators and we hope to you. But we also check your work to recognise your professionalism – we love to catch our people doing things right, so we can celebrate this with you.

Our Ethos and Approach

The Fundraising Partnership is committed to delivering the highest standard and quality of face-to-face fundraising. We state that we work to the highest standards in the sector and our pay and rewards and our approach to managing people reflects that we employ only the very best people as fundraisers.

We aim to:

- a) Recruit the great people
- b) Give them great tools
- c) Give them great support
- d) To achieve great results

We need every fundraiser wearing The Fundraising Partnership badge to understand what they need to do meet these standards, and to share our vision of high-quality fundraising.

As such we expect our fundraisers to exhibit PRIDE in everything that they do:

Personal

Responsibility

In

Delivering

Excellence

You are the public face of the charity, and the charity's reputation rests in your hands. Our charity clients have put that trust in you, and you must take that responsibility seriously. To do a great job for our charity clients it is essential that we provide a fantastic level of service to the public. This is at the heart of what we do.

We work on behalf of great charities that the public hold in high regard. As such they will put you on a pedestal and be respectful, they will also expect you to live up to the highest possible standards - and may judge you harshly if you do not do so.

It doesn't matter whether the person is someone who has passed you on the street, who's door you have knocked on, someone who gives you their time to have a conversation with you, or someone who decides to sign up to support the charity. All of these people are a

part of our audience. It is essential that every person who encounters you while you are fundraising has a positive experience.

We expect our fundraisers to work to the 6 key professional attributes:

1. Friendly & polite
2. Trustworthy & ethical
3. Clear & thorough
4. Responsive to the person's needs & interests
5. A great ambassador for the charity
6. Professional

Prohibited behaviour

You must not behave in any way that may bring The Fundraising Partnership or our charity partners into disrepute.

Prohibited behaviours are actions that are deemed likely to bring The Fundraising Partnership and or our charity partners into disrepute. As such breaches are likely to be subject to disciplinary action up to and including gross misconduct or dismissal.

1. ***You must not be seen smoking.*** If you are a smoker follow these rules:
 - Get out of immediate sight and find a discrete location.
 - Do not smoke close to where you are about to knock.
 - Remove or cover up all branded charity clothing and other items such as your badge and laminates and leaflets.
 - Only return to working after using something to disguise the smoke smell e.g., mints or gum, mouth spray, deodorant etc.
2. **Do not drink alcohol, be drunk or be perceived to have been.**
 - Do not be seen in a pub, even if just using the toilets, nor should you visit an off license.
 - Do not consume alcohol samples.
 - You must never take, be under the influence of illegal drugs or be perceived to have been.

- Do not be seen associating with anyone taking illegal drugs.

3. Do not act in any way that might reasonably cause any member of the public to be or become startled, anxious or concerned.

- You must never discriminate or make derogatory or offensive comments related to race, gender, sexuality, faith beliefs, age, disability, political views, or occupation or social class.
- Do not exhibit lewd or aggressive behaviour including swearing.
- You must never comment on someone's personal appearance, make personal comments, ask intrusive questions e.g, about health or finances or use physical contact when talking to members of the public.
- Ensure that you avoid any over-familiarity in your body language and in how you address people.
- Under no circumstances should you make physical contact with anyone you engage with.
- You should avoid being drawn into controversial areas of discussion such as politics or religion. The charity must never be associated with a specific political or religious belief due to your comments or actions.
- You must never exploit your position of trust for personal gain (e.g., seeking a discount on goods/services, or propositioning someone for a date, or act on behalf of any other business or interest or political or campaigning organisation).
- You must never go into people's houses or onto their property.
- You must never recruit a supporter who intend to cancel within 1 year or seek to recruit someone with the intention to cancel. This is known as short selling e.g. saying "just do it for a few months".

Vulnerable People

Ensure you follow the advice in our Sensitivity & Vulnerable Persons Policy. It provides full details of how to be aware of, and how to deal with, people who may be in vulnerable circumstances.

You must take into account the needs of any possible supporter who may be in vulnerable circumstances or need extra care and support to make an informed decision.

If you have concern that someone is in a vulnerable state for any of the reasons described, or any other, you should not seek to recruit them as a supporter.

Older people may also be more likely to be vulnerable, especially due to dementia. However, age is not the only factor when considering who may be classed as vulnerable. The below list shows examples of vulnerability and as such fundraisers must understand when it is and when it is not appropriate to sign people up.

- Hearing impairment.
- Speech impairment.
- Limited English language skills.
- Learning difficulties.
- Bereavement.
- Low income or debt or credit difficulties.
- Gambling issues or addiction.
- Intoxication due to drugs or alcohol.
- Mental or physical illness.
- Disability.
- Stress and anxiety.

As a fundraiser representing our amazing charity clients, you must not exploit the trust, lack of knowledge, apparent need for care and support or vulnerable circumstance of any supporter at any time.

You must not complete the contribution form if you know, or have good reason to believe, that a person lacks capacity to make a decision to donate or is in vulnerable circumstances which mean they may not be able to make an informed decision.

If you are concerned the person you are speaking with may be vulnerable you must follow the advice in our Vulnerable Persons Policy to politely and respectfully end the conversation.

Sometimes you may find that people want to support the charity where you might suspect it is not right for them to do so. For example, they have low incomes or restricted finances or support a lot of other charities. The excellent fundraiser will spot this and double check suitability by asking questions and making the support think carefully 1st or even choose not to recruit that supporter. Your job is to recruit supporters and to help people make the right decision for them.

Be sceptical about when recruiting a supporter feels “too easy”. You should usually know why a supporter has chosen to support the charity, if you don't you may have missed a vulnerability issue. They may be easily persuadable due to any number of conditions or circumstances or they may be someone with a gambling issue that just wants to be in another draw for example. A good fundraiser will know from what the supporter has said, or questions they ask or by reading responses to what you have said what it is that motivates their support.

Be wary of your own charisma. Sometimes people will support because you are so persuasive. That of course is part of your job. Be aware that sometime this may lead to people deciding to support who probably should not. Liking you or being impressed by you is not a reliable motivator of support in the long term or reason enough on its own, for someone to support a charity. You should always be checking that they have engaged about the charity cause and or the fundraising method and aren't just doing it because of your charisma.

General Demeanour

Remember that you are representing the charity throughout all of your time at work, when you are actively working and in down-time too, so be aware of your demeanour and behaviour at all times.

- **You are the public face of the charity.**
- **You must always be friendly, polite and respectful to everyone who you speak with.**

Presentation and uniform

You must always maintain a smart and professional appearance.

1. You must always wear the correct uniform while you are fundraising.

- a) You will be issued with an agreed quantity of uniform items of a suitable size.
- b) You must keep these in excellent condition.
- c) Uniform is usually a branded polo shirt and jacket.
- d) Charity branding and logo must be visible and easily identifiable at all times.
- e) If you need more uniform, please let your manager know or email administration@thefundraisingpartnership.co.uk
- f) As well as the branded uniform, you should wear your own smart trousers/skirt and dark shoes (make sure they are comfortable).
- g) Blue jeans are not to be worn.
- h) Trainers are only permissible if black and unbranded.

2. You will also be issued with fundraising presentation materials, and on occasion other items.

- a) You must keep these in excellent condition.
- b) If they need replacing, please let your manager know or email administration@thefundraisingpartnership.co.uk
- c) You must show these to the supporter at introduction and should use them throughout your conversation.

3. You must not use your mobile phone for personal matters when working.

Identification Badges

You must always wear a valid ID badge when fundraising. You must never fundraise without wearing your ID badge – this is a breach of the CIOF guidelines which our charity partners must ensure they and we adhere to.

1. If you forget your ID badge you must return home to collect it
2. You must inform your manager that this has happened
3. Your ID badge must always be worn so that it is clearly visible, showing the charity branded side and not the company side, and easily read. Either;
 - a) on a lanyard around your neck,
 - b) or attached to your shirt or jacket at lapel height
4. You should always show your ID badge to members of the public when you introduce yourself. Not only is this a requirement, you will also see that it build confidence with the supporter.
5. The Fundraising Partnership ID badges are issued for a limited time period and are printed with an expiry date.
 - a) If your ID badge has passed its expiry date, you are not permitted to fundraise.
 - b) We will always do our best to ensure you issued with a renewed ID badge before the expiry date of your current badge.
 - c) If your badge is approaching its expiry date, please let your manager know or email administration@thefundraisingpartnership.co.uk
6. You should refer any verification enquiry to the charity, where they will have a register of your name and photo and ID number. Ensure you issue the correct phone number for supporter care for that charity. **Please note, the charity's shops may not have details that you are working in the area, nor will they have a record of your name and ID number. Supporters should be encouraged to contact the charities Supporter Care line.**
7. If the enquiry from a general authority e.g. a police officer, you should provide the company's details that are on the reverse of your ID badge.

Other equipment

You will also be issued with laminated A4 presenters and you should always have these with you and use them to re-enforce your legitimacy and to help you with your conversations. Typically, they will include 1 or more presenters for the charity that you are representing and a support with confidence presenter.

You will also be issued with welcome leaflets to leave with supporters and you should not only issue these but wherever possible talk the supporter through their contents. You must also write on these the following:

- Your name in full
- Your ID number
- The amount that they have agreed to pay per month e.g. write "£4.34 per month"

By offering these details freely, this again helps supporters build trust and affirms legitimacy. A fundraiser should have nothing to hide and be proud that they were the one to enable a supporter give to the charity. **If you have any concerns about leaving your name and ID number, then more than likely you shouldn't have signed the supporter up in the first place.**

Some charities also issue "Thanks for listening cards" and you will be expected to use these as directed, along with any other charity message that have been agreed at the time such as verbally promoting a different event or campaign or service.

It is your ultimate responsibility to ensure that you have a suitable working tablet that is charged and has data at all times, even if the company is supplying either of these to you.

You will be expected to conform to any other equipment requirements that may be required from time to time, including the use of PPE and other measures related to hygiene control.

The Sales Conversations

The Fundraising Partnership believes in finding potential supporters and engaging them in a conversation that provides the information they need to decide whether they wish to support the charity via a regular donation.

We do not believe in pitching at people, seeking to persuade, trick or manipulate people to gain their support.

We believe in providing clear and full information about the nature and form of their support and never withhold or hide key information or present it in a misleading way.

We believe in cause led fundraising using your ability to win trust and build rapport to have the opportunity to explain how someone's support through regular long term donation can make a difference. We do not, for example believe in using the lottery and the scope to win prizes as a significant motivator for someone to become a supporter.

1. Your fundraising must be legal and must be open, honest and respectful.
2. You must be polite to people at all times.
3. You should always be professional and respectful as well as friendly and engaging.
4. You must be clear in your introduction about what you are doing. **You must not say that it is not about money or that you are "not fundraising" or "not here to sell you anything".**
5. You must seek consent to have a conversation at the outset and throughout the conversation.
6. Always get confirmation of understanding during your conversation, especially if the person agrees to support the charity.
7. If someone chooses not to engage with you when, you approach them, you must not back-chat or make comments which could be construed as offensive or disrespectful.
8. Never attempt to argue with a member of the public.
9. Never make anyone feel bad or guilty or ashamed because they are unable or have chosen not to support us.
 - a) For example, someone who just can't afford to support us due to low income, recently lost job or a credit issue, should not be made to feel worse because their situation also means that they can't support a charity that they would otherwise like to. Instead tell them that they have made the right decision and that there are other ways they can help us that may suit them better if they wish and we welcome support of any kind.

10. Never show disappointment through comments or body language. The person may feel a little guilty about not being able to, or not wanting to support the cause and may perceive your reaction differently. We must remember that we knocked on their door, or stopped them to talk at a venue. The majority of the time **we** are pitching to them and they have every right to say no, just like you will have done a hundred times to fundraisers from charities yourself.
11. Try and leave each person feeling that you are happy that they have had the opportunity and have made the right decision.
12. The ideal way to leave a door, if the situation permits it, is to finish by talking about other ways they could support the charity in a non-pressurised way.
13. Ensure that you avoid any over-familiarity in your body language and in how you address people.
14. Under no circumstances should you make physical contact with anyone you engage with.
15. You must be well informed about the charity that you represent and always ensure you are speaking accurately about the work of the charity you represent.
16. Do not mislead or say anything likely to mislead anyone. Specific examples can include:
 - a) Leaving out information.
 - b) Being inaccurate or ambiguous.
 - c) Exaggerating details.
 - d) Be honest if you do not know the answer to a question.
 - e) Never make up an answer or try to guess the answer.
 - f) Direct the person to the charity's website or their supporter enquiries phone number.
17. Do not benefit from a supporter's mistake in understanding. For example, if a supporter has mistaken our charity for another, we must correct the mistake to ensure a supporter understands who it is they are signing up with
18. You must not unfairly criticise or insult other people or organisations.
19. You must not encourage a supporter to cancel or change an existing contribution in favour of a contribution to another charity.
20. While reasonable persuasion is allowed, you must not fundraise in a way which is unreasonably persistent or places undue pressure on a person to support.
 - a) You must always respect an individual's decision whether or not to sign up.

b) You must not use any manipulative or deceptive sales techniques, or guilt trip, or use flirtation, or any other unprofessional or cajoling behaviour when encouraging the public to donate.

c) You should only ask for support once and never repeatedly ask for support after a clear “no” has been given.

21. You must gain the person’s agreement to donate before you begin to complete the contribution form.

22. You must not continue to ask a person for support if that person clearly indicates – by word or gesture – that they do not want to continue to speak to you. You must end the conversation in a polite way.

23. All conversations with a prospective supporter must involve one fundraiser only. This is to ensure there can be no perception of pressure being exerted.

24. You cannot sign up family members or close friends. To do so is a severe offence likely to be deemed potential gross misconduct which could lead to instant dismissal. If a family member or close friend wishes to support the charity, they should do so by going direct to the charity website.

a) With acquaintances i.e. people you know but are not close friends, you must make sure that they really want to sign up and are not agreeing to donate simply because they know you. You must let your manager know about any contributions by acquaintances.

You must always follow a clear dialogue structure. The structure, content and style of your fundraising conversations must adhere to the requirements laid out by The Fundraising Partnership and the overall conversation must abide by the rules, principles and standards laid out in this Code and in our Fundraising Promise.

Clarity about the contribution

1. You must always be clear about what the type of contribution we are asking for.
2. You must always be clear that we are asking them for a regular monthly contribution, and we are asking for this to be ongoing and long-term.
3. You must never suggest that this is without commitment, or that a short-term contribution is all you are asking for.
4. You must not sign somebody up if they have indicated that they can or will only give for a short time. The supporter must be comfortable with giving on an on-going long-term basis.
5. You should always talk very positively about the benefits of long-term giving – for the supporter it is a small affordable amount and yet that contribution, along with all the others, has the power to make a huge impact for the charity and the cause it works for.
 - a) Should you be asked to clarify what is meant by long-term, the answer is that we hope the supporter will be able to give on a monthly basis for many years to come and would encourage them to give for as long as they can comfortably do so.
 - b) If a supporter asks you what the minimum time they can give for, you should say that thought there is not a minimum as such, but we would like people to have the intention of giving for at least three years.
 - c) **Please note – knowingly signing supporters up to short term giving, will cost the charity money. WE DO NOT ALLOW YOU TO KNOWINGLY SIGN UP A SUPPORTER WHO INTENDS TO CANCEL AFTER A SHORT PERIOD OF TIME.**
6. If the person is interested but does not wish, or is unable, to commit to becoming a regular lottery supporter by direct debit you should refer them to the charity's website.
7. You must always make clear the full monthly contribution amount you are asking for.
 - a) You may break this amount down to smaller amounts to demonstrate how affordable it is, but you may only do so after you have made clear the full monthly amount.
8. You must always be clear that the first direct debit payment will be taken at the first available opportunity, which will be on one of the dates specified on the form.

9. You must never refer to the delay until the first direct debit payment as a way of downplaying the commitment the supporter is making.
10. You must state that the supporter can cancel at any time if their circumstances change or for any other reason. However do not use this as a way of encouraging a short term donation.

Small one off gifts or short term regular donations are hugely valuable to our charity partners when these donations are made directly to them via a charity shop, over the phone or online. Please encourage supporters to contact the charity directly to make a one off donation if this is their wish, but **NEVER** sign someone up if you think they intend to cancel after a short period of time.

Supporter choice

This section only applies when working on behalf of charities that offer both a form of regular giving and lottery.

Having a choice to offer potential supporters is a major assistance in recruiting more supporters. This is a great privilege for a fundraiser to have but it is to be used with sensitivity.

Lotteries are a great fun way for donors to support the causes we represent, they can be a fun interactive way to donate. However, some people do not want to donate via a lottery, be that for religious or moral reasons and this is where a regular monthly gift to that charity can be an option.

The range of contribution options is to provide a genuine choice for the supporter not for the fundraiser. Fundraisers who are abusing this privilege inappropriately may have the options they can offer reduced, or they will be removed from the contract.

You must give the supporter all the options available and let them choose the one that is right for them. You must not:

- a) push supporters into a contribution type that they don't want or an amount greater than they wish to contribute.
- b) push supporters who want to support via the lottery into supporting through regular giving instead or vice versa.

- c) use the choice to upsell supporters into a larger contribution.

Charity budgets and other needs can affect the balance of preference regarding the two forms of support. You will be advised by the company on the appropriate emphasis to give to either form of support at any particular time.

Completing the electronic contribution form

Our electronic forms have been designed especially to allow you to follow a smooth journey when asking supporters for their details or informing them of specific legal requirements such as how they wish the charity to contact them, or the solicitation statement.

1. You must record supporter details accurately and complete mandates allowing the supporter to see what you are writing.
2. Fundraisers should never take copies of supporter data for any purpose.
3. You must attempt to validate the supporter's mobile phone number by checking the supporter has received the welcome text message.
4. You must be careful to keep the supporter's information safe and secure while filling out the form remembering that you are in a public space.
5. You must read out the Direct Debit and Gift Aid Statement or offer it for the supporter to read themselves.
6. While you may emphasis the benefits of the Gift Aid scheme you must ensure the supporter makes their own choice whether or not to opt-in to it. You must not try to offer advice regarding their personal finances or tax position.
7. You must read out the fundraiser checklist. Ask the supporter each statement separately and tick the appropriate box.

Telling supporters we are paid to fundraise

As a fundraiser, you should be proud of the work you are doing to represent a charity. The donations you gain from supporters will make a huge difference to the charities long term fundraising needs. If done correctly, the average supporter will donate for several years and even when supporters decline to donate, you have helped the charity spread the word about the amazing work they do. **Be proud to be a paid professional fundraiser.**

1. Whenever asked you must state that you are a paid fundraiser and correct any supporter who says that they believe that you are a volunteer.
2. You must always clearly read the solicitation statement word for word. It must not be rushed or paraphrased.
3. You must read the solicitation statement before taking any bank account or card details from the supporter.
4. You must show the supporter the solicitation statement, highlighting that is the same statement which you read earlier, directly before asking them to give consent that you have read it to them.

Data Protection

1. Fundraisers should never take copies of supporter data for any purpose.
2. You must always read the data protection statement word for word.
3. You must always read the data protection statement before asking the supporter to specify which ways they are happy to be contacted by the charity.
4. The data protection statement must include telling the supporter that they can change their communications at any time by contacting the charity.
5. Supporters must be given a clear choice of how they would like to be contacted by the charity.
 - a) Supporters must be able to choose to opt in or opt out of each communication channel – post, phone, email, SMS and social media.
 - b) You should whenever possible explain exactly what agreeing to any of the communications actually involves, e.g. the frequency of contact, the format and whether or not it may include requests to increase their contribution or make additional contributions.

The ability for a charity to contact a supporter in the future is extremely important and can add significant value to the work we do for our charity partners. Every supporter has the choice of how they wish to be contacted, however, where possible we ask that you talk positively about the future contact from the charity they wish to support.

Explaining what happens next

1. Talking through what happens after the sign up has taken place is an essential part of your consolidation and if done correctly will help your retention of new sign ups. If a supporter has everything they need from you after you have left, the supporter will have little doubt that the sign up was genuine, or that they have done the right thing for them and for the charity. You must always explain the next steps as part of your thank you to supporters.
2. You should let supporters under the age of 25 and over the age of 80 know that we will attempt to welcome call them on the same or following working day. Please explain this call is to give them time to reflect on if signing up to donate is the right thing for them to do.
3. You should let them know the number from which the call will be made.
4. You must be clear that the supporter has already agreed with you to make a regular monthly contribution – if we are unable to reach them on the phone their contribution will still be processed.
5. You must also explain that they will receive a confirmation letter before the contribution starts, which will confirm the details of their contribution including the date of their first payment.
6. You should be clear with the supporter that both the welcome call and confirmation letter will happen regardless of communication preferences.

Supporter ages

1. You must take reasonable steps **not to ask** for a regular contribution from anyone under the age of 18. If it becomes evident the person is under 18 you must not complete the contribution form with them and you should politely end the Conversation.
2. Please note: the minimum supporter age on The Fundraising Partnership campaigns is at least 25, which is a measure in place to protect the charity from high cancellation rates..
3. Unless otherwise advised there is no maximum supporter age but when signing up any older people you must be extremely mindful of potential vulnerability and follow the rules and guidance above and in our Vulnerable Persons Policy.
4. All supporters older than 80 will receive a verification call the next day to check that good practice has been followed, they are clear what they have agreed to and to check for signs of possible dementia and related conditions.

Reporting incidents & pre-empting complaints

We recognize that even excellent fundraisers will make mistakes and may also sometimes be involved in incidents or complaints, even if the fundraiser does everything correctly.

It is a requirement that all fundraisers report any mistake or incident that might lead to a complaint immediately to their manager. This is so we can inform the charity in case a complaint is made and ideally before it is made.

Handling complaints

A charities reputation and position within society is sacrosanct. We strive for every interaction to be a positive experience, however when something does go wrong, we need you to follow the below rules to minimise the impact on the charity.

1. You must follow our Complaints Policy should you need to deal with someone wishing to make a complaint.
2. If someone makes a complaint of any nature – which includes comments which could reasonably be taken as a complaint – you should:
 - a) Apologise
 - b) Let them know we take their comments seriously,
 - c) Provide them with your name and ID badge number.
 - d) If a senior member of The Fundraising Partnership is nearby and available, you may wish to ask them to speak with the person.
 - e) Provide the person with The Fundraising Partnership's contact details printed on the back of your ID badge which is administration@thefundraisingpartnership.co.uk
 - f) You should also let them know our complaint policy is available at www.TheFundraisingPartnership.co.uk/complaints-policy.
3. Never react negatively or try to argue with someone who wishes to make a complaint. It is important to understand that your job in those circumstances is to help someone make their complaint through the right channel, so that it can be properly addressed; **it is not your job to try and resolve the complaint there and then, allowing a supporter time to think and then the opportunity to talk to someone else from either The Fundraising Partnership of the Charity can help to diffuse a situation.**

Door to Door Rules

When working door-to-door, we must remember that we have not been invited onto a supporter's premises. We are guests, we are calling on them unannounced and as such we must treat every house and every supporter with respect. The rules below are designed to **exceed** the minimum standards set out by the Chartered Institute of Fundraising, which are in place to protect donors from undue distress and protect a charity's good name

1. You must not fundraise before 9am Monday to Saturday or before 10am on Sundays and public holidays, or after 9pm on any day or date. If you need to call again at a property (two-step confirmation) the second visit must not take place outside of these times, unless the person at the property asks you to make the return call at a certain time.
2. You must only approach doors within the postcode region or territory that you have been allocated to work in.
3. You must not stop residents from shutting their door (for example, by putting your foot in the doorway). There is no need for you to be this close to a supporter's house.
4. You must not enter a residential property, even if invited by a resident of the property. **This deemed to be a potential gross misconduct level offence, meaning you are likely to be subject to severe disciplinary action.**
5. All conversations with a prospective supporter must involve one fundraiser only. This is to ensure there can be no perception of pressure being exerted.
6. No more than two fundraisers may approach a property together, and this should only happen in the instance of one fundraiser training or shadowing in the other. In this instance the senior fundraiser should let the resident know that is the situation.
 1. "Bunny hopping", where 2 fundraisers work on the same side of the street at the same time is not permitted. It creates an impression of "flooding an area" and is also significantly slower than knocking separately.
 2. Knocking on different sides of the street by 2 fundraisers at the same time is permissible but should not be general practice.
7. You must only knock on the front door or main entrance of a property (usually the door that is closest to or most directly accessible from a street), unless a resident asks you to do otherwise.

8. If a building contains several properties and you need permission from a resident in order to access the building, you must not use entry permission given by one resident to then call on other properties in the building. You must get individual permission to enter the building from the resident of every property you visit in the building.
9. You must take extra care when visiting properties after dark. If you are visiting isolated places, you must consider whether the visit could cause anxiety to residents before approaching a property.

No cold calling zones and signs

You must not cold-call in an area where a 'no cold-calling zone' has been created legitimately which means that charitable collections **are not allowed**.

You are expected to notice such signs before knocking a street.

1. If you suspect a street that you have started knocking a non-cold calling zone you must stop and check for signs immediately.
2. If you do start knocking a street in a no-cold calling zone you must stop immediately and inform your manager.
3. Making a genuine mistake occasionally is understandable but failing to report it is a serious offence.
4. You must not knock-on doors which clearly display a sticker or sign which include any of the following words or similar:
 - a) no cold calling
 - b) no cold callers
 - c) no charities
 - d) no charity canvassers
 - e) no charity fundraisers
 - f) no salespeople
 - g) no unsolicited callers
 - h) no callers without appointment
 - i) or anything else to this effect

5. If you knock on a door accidentally with such a sticker e.g., you don't notice it, you must do the following:
 - a) Wait for the resident to answer.
 - b) Immediately apologise and explain that you did not see the sign and would not have knocked if you had, but you thought it appropriate to wait to apologise.
 - c) Do not criticise the location or visibility of the sign – it is your responsibility to see them.
 - d) Apologise once again
 - e) If you sense that they are not satisfied, inform your manager immediately.
6. If you are asked by a resident to leave and / or to not return, you must not return. You must also let your manager know so that such that controls can be put in place to ensure other fundraisers do not return to that property.

Respecting property & privacy

1. You must always respect the right of people not to speak with you because the timing is bad, and you should look for indicators that this might be the case and if so, terminate contact.
2. Your working hours will be agreed but, in any event, you must not knock on any doors before 9am Monday - Saturday or after 7pm, without specific permission from manager.
3. You must not knock-on doors after 9pm on any day and to do so will be deemed as potential gross misconduct.
4. You will not normally be permitted to knock on doors on Sundays or any bank holiday unless specifically agreed by a manager.
5. If a building contains several properties and you need permission from a resident to access the building, you must not use entry permission given by one resident to then call on other properties in the building. You must get individual permission to enter the building from the resident of every property you visit in the building.
6. You must take extra care when visiting properties after dark. If you are visiting isolated places, you must consider whether the visit could cause anxiety to residents before approaching a property.

7. You must approach doors respectfully using paths only and close all gates on exit. Do not walk across lawns or take short cuts across gardens to reach the next door.
8. You may approach side doors only if the front door is not in use or directed by a resident's sign.
9. Maintain a safe respectable distance from the resident. Do not loom over people or invade their personal space.
10. Never create a physical barrier or use your limbs to prevent someone from being able to get past you.
11. In cramped situations, or whenever appropriate, avoid standing close and directly in front of the resident. Instead stand to the side and side on if required.

Private site rules

Working at a private site, such as a supermarket, garden centre or shopping arcade can be a great way to talk to supporters. However, working at a private site has a strict set of rules to protect supporters from unwanted approaches and to protect the private site location and charity from complaints.

There is even a mystery shopping scheme in place where every private site location must be logged with the Chartered Institute of Fundraising in advance so they can send a mystery shopper to ensure we are following the required rules.

1. You must only work in the specific venue and pitch which has been allocated to you.
2. You must always abide by site rules as laid out by the venue / site management for the specific site and pitch you are working in, including the agreed working hours.
3. Ensure that you have had a health & safety induction on arrival and that as a minimum you know the following:
 - a) Evacuation routes from your location of working.
 - b) Who to contact and where in the event of an accident or emergency including need for 1st aid.
 - c) The locations and protocols for use of on-site toilets and any other rest facility such as a staff kitchen that you are given permission to use.
4. You must be within one metre of the stand unless otherwise directed by the owner or manager of the site.

5. You must maintain a good relationship with surrounding vendors, and the site management and security personnel.

Private site presentation

1. You or your team will be provided with a promotional banner and / or display stand or counter. These must be looked after and kept in excellent condition. If this is not the case or there is any problem with your banner or display stand, please let your manager know or contact The Fundraising Partnership on administration@thefundraisingpartnership.co.uk
2. Your personal items must be stowed safely away, out of sight.
3. Do not leave these unattended when not working and create scope for theft or bomb scares.
4. You should avoid being seen eating or drinking whilst at the stand of at all possible.
5. You must not place any drinks cans or cups or food on the stand.
6. Try to avoid drinking in front of the public and do not eat whilst at the stand.
7. Stay at your stand to work.
8. You must stay within a few metres of the display when working. On no account wander away from the stand to attract supporters.
9. Do not walk alongside people generally and never for 3 steps or more. Even if they ask you to walk with them. This is the "3 step rule".
10. You or your team will be provided with a stock of the charity's promotional material and information leaflets etc. You must ensure these are neatly and clearly displayed on your counter.

Conduct when approaching people – street and private sites

1. You must avoid causing an obstruction, or congestion to the public. You must not deliberately block the path of members of the public.
2. You must never approach any member of the public who is clearly on duty, such as site employees, police officers, paramedics, cleaners or carers.
3. Do not approach retail staff at work in a store. Only ever sign them, up when they are on breaks.
4. You must never approach any member of the public who is seated, queuing or otherwise engaged (for example, at a cash machine).

Existing supporters

1. If someone tells you that they already support the charity through regular contribution you should accept that as correct.
 - a) Never offer to check.
 - b) Never suggest that they don't.
 - c) Never blame the system for the fact that you have called on them.
 - d) Never ask them to increase their support.
2. You must not attempt to sign up existing supporters for an increased contribution or additional entries in a lottery.
 - a) We are paid to find new supporters and not to "upsell" to existing ones.
 - b) We give guarantees that supporters who sign up will not be asked to increase their contribution later or if they will, we specify how that will be done, which will be done by the charity directly.
 - c) We must not lose support through seeking to increase a contribution.
3. Instead, you should make the existing supporter feel good about their continued support. For example:
 - a) Thank them for their support.
 - b) Tell them about the difference their support is making. Have a specific example or phrase to use.
 - c) If in a lottery, wish them well in the draw in future.
 - d) If they do want to increase their contribution, refer them to the charity's website.

Gambling issues

The lottery is a gambling product, and as such is governed by additional rules set out by The Gambling Commission who govern all betting and gambling in the UK. Our charity partners have to apply for licences to run their draw and must abide by the same rules as casino's and betting shops. You must never conceal that fact that a supporter is joining a weekly Lottery scheme.

Whilst a charity lottery is a low-risk gambling product and the chances of you interacting with someone with a gambling issue are low, the charity are still required to have policies, procedure and training in place.

1. You should look out for people who may have gambling issues and avoid selling to such people as much as feasible. The charity must abide by the Gambling Commissions rules to safeguard vulnerable people and problem gamblers. Indicators can include:
 - a) Gaining their support was too easy when they found out the way to support was through a lottery, and you don't really know why they chose to support the charity e.g., a lack of knowledge of the charity or the issue or lack of clear motivation for support.
 - b) They ask a lot about the lottery a lot e.g., the draw odds and mechanics or the prizes.
2. You must always politely disengage from the conversation if someone tells you that they have/or have previously had problems with gambling. Please report to your Line Manager the fact that you have had this conversation as our charity partners are required to report the number of interactions we have with anyone with a gambling issue. **We do not need the supporters details, just the fact you spoke with someone and they mentioned they had a gambling problem is enough for the charity.**
3. If someone tells you that they have self-excluded from the charity's lottery then you must apologise and politely end the interaction.
4. If someone asks about self-exclusion and would like to exclude themselves from the charity's lottery you must direct them to the charity's website, which includes their self-exclusion policy and guidance, or give them the phone number for the charity's supporter care team. You must politely end the interaction.
5. If anyone asks you about the charity's responsible gambling policy, you should direct them to the charity's website which includes their responsible gambling policy.
6. You must respect peoples' beliefs and disengage politely if they tell you that they do not gamble for religious, spiritual, or ethical reasons.