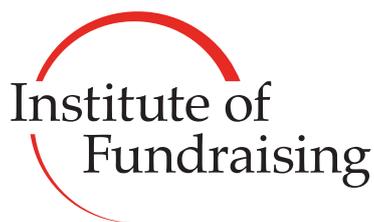




# **A GOOD CALL:** USING THE TELEPHONE FOR SUCCESSFUL FUNDRAISING



### About the Institute of Fundraising

The Institute of Fundraising (IoF) is the professional membership body for UK fundraising. We support fundraisers through leadership and representation; best practice and compliance; education and networking; and we champion and promote fundraising as a career choice. We have over 560 organisational members who raise more than £9 billion in income for good causes every year, and over 6,000 individual members.

[www.institute-of-fundraising.org.uk](http://www.institute-of-fundraising.org.uk)



### About Ethicall

Based in Bristol, Ethicall is a specialist telephone fundraising agency, delivering telephone fundraising campaigns for national and local charities, large and small. Here at Ethicall, we don't always shout about what we do, but we are "proper passionate" about our work and pride ourselves on keeping each of our charity clients and their supporters really happy. As our name suggests, we believe in embracing ethical and green principles across every aspect of our business, from how we treat our staff and suppliers, to our recycled stationery. Since starting the company eleven years ago, we are proud to have raised over £60 million for our clients and donated over £1.3m to a range of UK charities.

[www.ethicall.org.uk](http://www.ethicall.org.uk)

### With grateful thanks to contributors, which include:



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# INTRODUCTION: THE ROLE OF THE TELEPHONE IN EXCELLENT FUNDRAISING

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For more than 35 years, charities have relied on the telephone as a means of building relationships and engaging with existing and potential supporters. While today's digital world has opened up new opportunities and communication channels, the telephone remains a valuable way of connecting with supporters, delivering a unique and personal experience.

## Why might a charity want to make a call?

The telephone is a great way to create rapport, to inspire people and provide a great experience which connects supporters with a cause. As a communication channel designed specifically to enable conversation, it offers a wide range of opportunities to raise funds, develop long-term committed supporters, and to maximise donor satisfaction and lifetime value. Of course, the telephone is also widely used to further the charity's wider work beyond fundraising, providing information and support for beneficiaries, carers, volunteers and more.

## How can the telephone enhance the supporter experience?

A call gives supporters the chance to find out more about the charity, the impact of their donations and to ask any questions they might have. They can steer the conversation in line with their own interests. A good call will leave them feeling inspired, nurtured and valued, regardless of whether they are in a position to donate.

## How can charities use the phone to support their fundraising?

Each charity has a different approach. For some, this might mean a relatively small number of calls to thank supporters or an opportunity to touch base with major donors and potential legacy supporters, updating them about the charity's progress. For others, the telephone may well be their only means of talking with thousands of supporters across the country, a vital way of creating and deepening relationships. While charities often use the telephone to reach out to supporters, it's also an effective inbound response mechanism for fundraising appeals and more.

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“Having used the telephone since 1997 to inspire individual supporters, we find it is a great way to speak with people directly and enable them to understand more about the children and families we help and what a difference regular giving can make. Our telephone fundraisers now have over 100,000 conversations in any one year.”

**Amy Klein,**

Direct Marketing Acquisition Manager Direct Dialogue, Great Ormond Street Hospital Children's Charity

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## 10 reasons you might want to make a call

- 1. To find and reach new supporters** – Calling potential supporters to discuss the work of the charity, inviting them to become donors or to support the charity in other ways, like getting involved in a sponsorship event or joining a lottery programme.
- 2. To say “thank you”** – Welcoming and thanking people for their continued support, inspiring loyalty and reigniting commitment to the cause.
- 3. To communicate impact** – Contacting supporters to let them know what their donations have enabled the charity to achieve, building relationships and empowering donors.
- 4. To gather feedback** – Asking supporters for their thoughts on any aspect of the charity’s work and incorporating their feedback in future planning.
- 5. To convert supporters to regular giving** – Communicating with cash givers or non-financial supporters about the opportunity to become regular supporters.
- 6. To increase donation values** – Encouraging donors to upgrade to higher levels of support.
- 7. To diversify support** – Inviting supporters to diversify or deepen their involvement, taking part in events, charity challenges, volunteering and more.
- 8. To talk legacies** – Using the phone to open or continue discussions about legacy giving, making supporters aware of the importance of gifts in wills to the charity.
- 9. To encourage take-up of Gift Aid** – Informing supporters of the benefits of Gift Aid and encouraging them to apply it to their donations if eligible.
- 10. To check future communication preferences** – Confirming whether and how supporters would like to be communicated with in the future, including telephone.

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“Phone not only helps us build rapport with new supporters and keeps long term supporters updated with the impact their gifts make, it also plays the vital role of being our biggest driver of upgrades. Upgrading in turn improves donor loyalty, meaning we can do so much more to protect the planet we love.”

**Tom Micklewright,**  
Supporter Development Manager, Greenpeace

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**PART 1:**  
GREAT  
CONVERSATIONS  
YOU CAN  
HAVE WITH  
SUPPORTERS

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## 1. TO SAY THANK YOU AND PROVIDE GREAT SUPPORTER CARE

Because of the ability to reach out to new supporters, the telephone can sometimes be seen primarily as an acquisition tool. However, the telephone is one of the most versatile communication channels and can be incredibly effective when used for a range of supporter care or stewardship purposes.

Enabling honest and open conversations on a range of topics, the telephone can reignite supporters' passions for the cause, deepening relationships, helping charities understand donor motivations and more. Consider the many ways you might use the telephone to enhance supporter relationships, which might include welcome, thank you and feedback calls.

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“While the telephone is a fantastic way to ask for funds, if you only use it for financial asks, you run the risk of turning off supporters. Never underestimate the power of a simple thank you or update call to communicate just how much you value their support, explaining what a difference it has made.”

**Alex Weeks-Smyth,**  
Client Services Director, Ethicall

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### Welcome and thank you calls

When supporters have signed up to donate to the charity through another means, a welcome call can be a fantastic way to strengthen the foundations of that relationship, thanking them for their support, gauging the depth of their connection to the charity and establishing how best to communicate with them going forward.

Similarly, a thank you call timed to coincide with the anniversary of a supporter's first donation or following an increase in their gift level, can be a great way to re-engage and deepen the relationship.

“Thank you Crisis! You just rang me... You didn't ask for anything... You didn't even hint at a donation... You simply rang me to say “Thank You” for our continued support and to wish me a nice day... How lovely... Made my day... It's a pleasure to support such a brilliant charity.”

**Crisis supporter on Twitter**



### Feedback calls

Asking supporters for their views on relevant issues, the charity's work and any communication or fundraising activity can not only provide you with useful feedback but also build rapport. Using the phone to cultivate a two-way relationship can be instrumental in developing a mutually beneficial supporter journey and, over the long term, achieve the best possible lifetime supporter value. Put simply, it makes supporters feel important and valued.

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“The phone is the main opportunity we have for an immediate two-way conversation with supporters. Conversations allow us to understand who they are, why they support us and what is going on in their lives. When this is captured and used correctly, it can really enhance all communications with supporters across different channels.”

**Becki Young,**

Supporter Development Manager,  
Care International UK

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## 2. REACHING NEW SUPPORTERS

Recruiting new supporters is increasingly challenging in today's post GDPR world and yet it remains vital if you are to ensure a diversified and sustainable supporter base. The telephone can be a particularly strong channel to attract supporters across a range of demographics, enabling an individually tailored approach which can improve the supporter experience.

As with any recruitment campaign, it's important to take a strategic approach and identify what you want to achieve and how this will fit within your broader fundraising and communications plan. While the ideal outcome may indeed be a new tranche of regular supporters, every conversation has the potential to achieve a range of outcomes, whether that is a donation, lottery player or event participant, to raised awareness of the charity's brand and a deeper understanding of the work you deliver.

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“Developing real relationships with supporters requires authenticity and significant emotional intelligence. When building rapport is approached the right way and genuine conversations are struck with supporters, this is where the magic happens. Not only do you achieve long-lasting relationships and longer lifetime value, but you also achieve higher ROI on your fundraising efforts.”

**Jonathan Hazzlewood,**

Client Director, Return Fundraising

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### What makes for a great recruitment campaign

- **Quality data** – One of the most important considerations for a recruitment campaign is that you're using the best data available. This could be contact information that you hold already on your system (volunteers, beneficiaries, past supporters, event participants and more) or new prospects. Telephone agencies can often help in sourcing new prospect data. Ultimately, the better the data you secure for your campaigns, the more successful your campaigns are likely to be. *(See Being Responsible with Personal Data).*
- **Clear, honest and inspiring case for support** – When recruiting, your case for support is critical. You'll need to communicate why you need support and what it will enable you to do. Make sure your case for support is clear, honest and inspiring.

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- **Think through a range of options for ways people can support you** – It’s important to consider a range of options within your script or call guidelines that will appeal to different people’s interests. A conversation should have room to find out more about the supporter’s motivations about what they like, what they’re interested in, and you should be ready and flexible to respond in a way that works for that individual. This might mean using relevant case studies to convey the charity’s work or offering different levels or types of support – as well as potentially providing information about your charity’s services for them, or other ways they can get involved, for example through volunteering.
  - **Feedback or information requests** – While the initial purpose of the call may be to recruit supporters, consider what other information you could gather to maximise its value and to improve the donor experience. This might include asking for feedback or verifying contact data. You can cement this approach by incorporating such information within your campaign goals.
  - **A plan for what happens next** – Make sure you have plans in place to follow on from any recruitment campaign, including how and when you’ll next communicate with those who choose to give and those who don’t.

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“Through an engaging, two-way conversation you can explore a supporter’s motivations and preferences to donate. It’s also an ideal opportunity to introduce other products such as lottery plays as an alternative to the standard regular giving ask.”

**Richard Hill,**  
Managing Director, DTV Optimise

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#### Questions to consider when planning your recruitment campaign

- Who will you call and how will you source their names and numbers? Are you targeting a specific demographic or a cross-section of the population?
- If sourcing data from a third party, how will you carry out due diligence and confirm that they have lawfully gained the necessary consent for you to call?
- How will the names and numbers be cross-checked against suppression lists and current supporter data?
- What will you do if they ask you not to call again?
- What do you expect from this campaign and are these goals realistic? What will happen if you don’t achieve those goals?
- What is your case for support?
- How will you brief or train your fundraising team?
- What information do you expect fundraisers to capture during the call? Have you checked that your database can hold this information?
- How will you follow up with those that donate and those that don’t?

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### 3. TAKING SUPPORTERS TO THE NEXT LEVEL

The advantage of calling existing charity supporters is that you're likely to have an established relationship with them – they've donated to you or done something to give you support. Because of this, telephone calls to supporters can deliver a particularly high return on investment and success rate.

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“Having a conversation in real time with supporters allows them to stop what they are doing for a few minutes and really consider their support and the impact of their giving. We see time and time again that simply having a conversation with supporters improves lifetime value.”

**Bethan Francis,**  
Managing Director, Stratcom UK

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Of course, it's important to remember that each supporter's perception of and engagement with the charity will differ. Some may feel a deep-rooted connection to the organisation and its work, while others can be less engaged. So it's important that any supporter development campaign includes a range of options, both financial and otherwise, to enable people to continue their own unique supporter journey with the charity.

Typically, supporter development campaigns aim to increase people's commitment to the charity, the depth of their relationship and/or the level of gift. In practical terms, this might mean developing volunteers, campaigners

and sponsored event participants to become donors (or vice versa), encourage cash or ad hoc givers to join a regular giving or lottery programme, or increasing the level of current supporters' gifts (upgrade or uplift calls). While the purpose of the campaign may well be to build your regular income stream, recognise that this may not be the best or right option for everyone that you call.

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“Genuine conversations are beneficial in their own right, over and above an ask. In a recent upgrade campaign for Dogs Trust, almost half of the supporters chose to increase their donations, with more than 98% doing so over the phone. As well as producing a strong return on investment and communicating to supporters how much they mean to the charity, Dogs Trust learned a great deal about their donors, including their future contact preferences.”

**Natalie Bailey,**  
Director, NTT Fundraising

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### Questions to consider when planning supporter development calls

- What is the purpose of your call and what are you asking supporters to do?
- Is this a fundraising or administrative call?
- Which supporters will you call and do you have a legal basis to do so?
- What options will you offer different supporter groups (including those that give and those that do - volunteers) for developing their relationship and support?
- How will you follow up with those that donate and those that don't?

## 4. GIFT AID

The telephone can be an extremely effective way not only to explain how Gift Aid works, but to confirm whether supporters are eligible to apply it to their donations. A recent government study (published March 2018), indicates that one quarter of donations from eligible taxpayers are not currently Gift Aided, amounting to over £500m of potential charitable income, which could yet be claimed.

“You can quickly increase Gift Aid penetration of your donor file with a short phone call. The phone is particularly good for targeting those who don't respond to the Gift Aid ask on donation forms, those that actively avoid thinking about 'scary and complicated' tax affairs.”

**Steve Morris**, General Manager, Unity4

### How Gift Aid works

Enabling charities to claim an additional 25% on donations from UK income tax and/or capital gains taxpayers, Gift Aid increases donation values significantly without incurring any cost to the donor. One declaration can apply to donations made in the past four tax years as well as applying to present and future donations. What's more, higher rate taxpayers can often claim additional tax relief for themselves.

So long as the call does not contain any ask for funds, marketing consent or any marketing or promotion of the charity, Gift Aid campaigns can be classed as administrative calls. Supporters often welcome these calls and the majority of eligible taxpayers choose to Gift Aid their donations when asked.

### What Gift Aid supporters need to know

It's important to explain how Gift Aid works and to ascertain that supporters are eligible at the start of the process. Be aware that people's circumstances change and the telephone is a useful channel for going back to supporters to check their Gift Aid status as taxpayers. This might include students moving into full-time employment or adults retiring from the workplace.

### What records should you keep

As well as keeping your own records of Gift Aid donations, you'll need to keep a record of the declaration itself. HMRC will accept oral Gift Aid declarations so long as you keep an auditable recording, otherwise you must send a written copy of the declaration to the supporter giving them 30 days to cancel. Remember to keep records of any Gift Aid donations for six years after the end of the accounting period they relate to.

### Useful links

Find out more about how Gift Aid works from the HMRC at:

- [Claim Gift Aid](#)
- [HMRC Guidance on Gift Aid](#)
- [Charitable Giving and Gift Aid Research Report for HM Revenue & Customs September 2016 \(published by HMRC, March 2018\)](#)
- [Gift Aid model declarations](#)

## 5. LEGACIES

The decision to leave a legacy is not one that a supporter usually makes on the spot. And yet, a sensitive conversation with a committed supporter about the importance of gifts in wills can be a highly effective way of getting supporters to start thinking about a legacy gift. This means that the telephone is increasingly used to discuss legacy giving, particularly when following up a legacy mailing or other communication.

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“Legacy fundraising by telephone allows you not only to provide more information to supporters on the impact a gift in their will can have, but can uncover a surprising number of existing pledgers you may not already be aware of. A stewardship programme is key and telephone can be the backbone of this, allowing you to keep abreast of any changes in their intentions

and provide supporters with bespoke information that may influence their decisions.”

**Ben Smith,**

Client Services Director, Listen

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### Opening up the legacy conversation

A legacy call can be a great way to explore your supporters' views and introduce the idea of potentially leaving a charitable gift in their will. During your conversation, you might establish whether supporters have a will already, if they have considered including a charity and how far they might be along that process. This information can then guide future communications, targeting legacy marketing at a more focused and interested group. Consider coinciding your calls with campaigns like [Remember A Charity Week](#), when public awareness is likely to be at its peak.

Bear in mind that, because the topic of leaving a legacy can be a particularly personal and sensitive matter, the timing of the call can influence whether someone wants to talk about it then and there.

Telephone conversations are also a great opportunity to bust any myths around legacy giving, communicating that it's easy to do, it's not just for the wealthy, and that charities, family and friends can all be accounted for in a will.

### Questions to consider when making legacy calls

- What is the purpose of the call and do you have a legal basis for making it?
- How will you measure a successful call?
- What information are you looking to gather and what questions will you ask supporters?
- If a supporter clearly does not wish to discuss legacies, how else can you use that call? Can you convert the call to a thank you call?
- How will you follow up with supporters depending on whether they have an interest in leaving a legacy gift to your charity and/or when they are likely to review their will?
- What will you do if they offer to support your charity in another way?

### Useful links

Remember A Charity  
[www.rememberacharity.org.uk](http://www.rememberacharity.org.uk)

## 6. EVENT FUNDRAISING

Charities often use the telephone to support event-based fundraising activity, inviting people to attend fundraising events or take part in sponsorship challenge events, and to offer guidance and support to those that have already committed to doing so.

If you're calling to promote an event, the call will be deemed a marketing call. However, if you're calling event participants to make sure they have the information they need or to offer support, this is typically an administrative call.

When it comes to calling challenge event participants, pre-event calls can enable charities to distinguish the drivers for people getting involved in that event. Are they doing it because they are deeply passionate about the cause or because a friend asked them to? Their motivations will likely influence their supporter journey and understanding this can help shape your communications timeline.

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“Event calling can include registration, stewardship, conversion and post event calls. For each, it's important to think about the participants' motivations and what they need from the conversation. It's a great opportunity to make participants feel valued, answer questions and help them with fundraising ideas. Ultimately, any conversation must be about optimising their experience.”

**Natalie Bailey,**  
Director, NTT Fundraising

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## 7. INBOUND CALLS – RESPONDING TO SUPPORTERS AND OTHERS

While the telephone is a great way for charities to reach out to the public, it is also a fantastic response mechanism and ‘inbound calling’ can be a really useful way to further engage with supporters.

### Customer care and beneficiary support

Most charities encourage calls from the public, often offering specific helplines for supporters as well as beneficiaries, giving people an easy and convenient way for them to get in touch. Publishing an inbound telephone number enables you to encourage and respond to supporters’ questions, allow them to change their communication preferences, or enquire about information they have received. Inbound lines can also be used to offer relevant guidance and advice to the public and beneficiaries.

### Direct response fundraising appeals

In a fundraising context, an inbound telephone campaign often takes the form of a fundraising appeal made via television, radio, social media, newspaper advert or any other channel. The campaign message encourages the public to pick up the telephone and call to make a donation, request information or to help in some other way. People can call at a time that is convenient to them and about a subject that they wish to discuss, driving the direction of conversation.

Of course, there is no knowing how many people are likely to contact you at any one time and so arguably the biggest challenge for inbound calls is capacity. For this reason, many organisations outsource their inbound activity to specialist agencies who can adjust to the scale of each campaign.

Although an inbound call in response to an appeal can be quite transactional, this need not be the case. Skilled call handling can ensure the supporter builds rapport and has a great interaction with the charity. It provides a great platform and opportunity to enhance engagement and relationship building, putting in place the building blocks for a long-standing relationship.

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“We see inbound fundraising used as a successful fundraising channel either on its own or as part of a multi-channel approach. It’s important that the call centre and media agency work closely together to ensure a high call answer rate is delivered. The benefits of inbound is that it puts supporters in control of when the conversation takes place and the interaction is immediate, while the original call-to-action is still fresh in their mind.”

**Richard Hill,**  
Managing Director, DTV Optimise

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# **PART 2:** WHAT MAKES A GOOD CALL

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Depending on the purpose, the audience and the fundraiser, every call will be different. While it is unlikely to be someone's only interaction with the charity, a successful telephone conversation can be a transformative moment within their own unique supporter journey. A great telephone call will be one that not only adheres to best practice guidelines but inspires existing or potential supporters to engage further with the charity.

### Enhancing the supporter experience

A telephone call is an opportunity to create that pivotal moment; a positive and deeply inspirational supporter experience.

Consider each and every call from the supporter's perspective. That means keeping an open mind as to how that individual might be able to and want to engage with the charity. A telephone conversation is a unique opportunity to find out more about those motivations.

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“The power of letting a supporter speak and just listening to what they have to say can be the biggest gift you can give a donor. To hear a voice that cares, to listen and to thank them, can leave a donor feeling noticed, feeling respected and proud to support your cause.”

**Ben Suffell,**  
Managing Director, QTS Fundraising

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While some people relish the opportunity to discuss the charity's work in this way, others may prefer not to discuss it over the telephone. So it's particularly important that you know who

you can call for fundraising and administrative purposes and that you handle every interaction respectfully and sensitively.

### Knowing the rules

There are several rules and legal requirements that apply to telephone fundraising. These include the need to:

- ✓ Ensure you have a lawful basis for contacting anyone over the telephone. Be aware that the rules for who you can contact vary depending on the purpose of the call.
- ✓ Check your list of contacts against relevant suppression lists, including the Telephone Preference Service (TPS) and Fundraising Preference Service (FPS), to ensure you are clear about who you can and can't call.
- ✓ If you're using consent as your legal basis, you'll need to check that your consent is more recent than any FPS registration. Conversely, existing consent will override a registration on the TPS, so long as that consent complies with the Data Protection Act 2018. (*Information on legitimate interests is covered later in this guide*).
- ✓ Collect and use any personal information fairly and in keeping with data protection regulations.
- ✓ Make sure you have a written agreement in place with any third parties/suppliers. This should articulate their roles and responsibilities for the campaign, including how they will protect the public (particularly those who may be vulnerable) and how to ensure complaints handling, data protection and other legal requirements will be met, together with the costs involved.

Many of the regulations relate to who a charity can contact in what circumstances and how to look after that data. (*See [Being responsible with personal data](#)*). Brush up on the rules in the Code of Fundraising Practice and the guidance resources below.

## Useful links

- [Code of Fundraising Practice](#), Fundraising Regulator
- [Communication with Individual Donors](#), Commission on the Donor Experience
- [Persistent Misuse](#), Ofcom
- [Guide to the General Data Protection Regulation \(GDPR\)](#), ICO
- [Guide to Privacy and Electronic Communications Regulations \(PECR\)](#), ICO
- [Direct Marketing Guidance](#), ICO

## Top tips

1. **Don't always ask for money** – develop a communications strategy that uses the telephone for a range of purposes, not only asking for funds.
2. **Tailor every conversation to the individual** – make sure that your conversations reflect that person's unique relationship and involvement with the charity, providing fundraisers with as much relevant supporter history as possible.
3. **Aim to inspire and re-ignite supporters' passions when you call** – where relevant, remind them why they give and the difference it makes, encouraging supporters to feel hopeful and empowered by what they can do to help.
4. **Listen to what people say** – every conversation is a chance to learn more about supporters and to deepen those relationships. Ensure their feedback (and that of your fundraisers) is channelled into future campaigns.
5. **Time it right** – tailor the supporter journey so that the timeline of calls is appropriate and that nobody receives a repeat call.
6. **Don't be afraid of using the telephone as an acquisition tool** – it's one of the most effective ways to reach new supporters

and build the foundations for committed and lasting supporter relationships.

7. **Make your agency part of your fundraising team** – if you're working with an agency, introduce them to beneficiaries and let them see your work in action. The more you engage with them, the better they can convey your messaging and the greater insight they can deliver about your donors.
8. **Be clear around your approach to people's contact data** – create and deliver clear, thorough data protection statements so the supporter knows how you will use their details and communicate with them in future.
9. **Monitor campaigns using short and long-term measures** – while immediate feedback can help you shape and improve campaigns, it is longer-term results that will convey how successful the campaign has been in building supporter relationships and aiding retention.
10. **Test and explore what calls work best to meet your goals** – this could be welcoming and thanking supporters, donor acquisition and development, support for event participants, legacy promotion, exploring corporate partnerships, handling calls in response to an appeal and more.

## 1. PLANNING A TELEPHONE CAMPAIGN

What makes a successful telephone fundraising campaign? For each and every organisation this will differ, depending on the purpose of the call, the audience you're reaching out to and many other factors. The telephone may be one component within an integrated multichannel campaign. In all cases, good planning is vital.

Whether you wish to use the telephone to reach a select and targeted group of supporters, or

to engage thousands of supporters, you'll need to plan for the campaign as part of your wider fundraising strategy. This means weighing up the risks and opportunities and considering the overarching supporter journey.

As with any fundraising activity, your telephone campaigns should be carried out in line with your organisational values. Think through what you hope to achieve from the campaign, how it will be carried out and monitored, and what your success measures will be.

Here are some questions for you to consider that will help you prepare for a successful telephone campaign:

### Planning the strategy for your campaign

- What is the purpose or objectives of the call/campaign?
- Is the call for fundraising/marketing purposes or is it an administrative call?
- Who is your audience?
- Will you call your own charity contacts? If so, do you have a legal basis to call and is there enough data to make the campaign viable?
- Do you need to source new contact data for people to call and how will you do this?
- Are you clear on the rules for who you can and can't call?
- What policies are in place – or should be put in place – defining the charity's approach to vulnerable people, data protection, charity branding etc?
- What are the success measures/targets for the campaign and how will they be measured? Consider not only short-term gain, but compliance, retention measures, supporter satisfaction and lifetime supporter value.
- What are the risks and how will you mitigate these? How will these be documented and reviewed as the campaign progresses?

### Inbound calls

While many of the same principles apply for incoming and outbound campaigns, when planning inbound activity, you may need to consider and plan for a broad range of potential reasons for an individual's call. Is he/she responding to the call to action? To donate or get involved in some other way? To complain about the appeal or cancel a donation? Ahead of any inbound campaign, do some scenario planning, exploring why someone might call and how you will respond. In each scenario, identify some responses for different supporter groups.

### Delivering your campaign

- Who will make or receive the calls?
- If you will be working with a third party, what due diligence has been carried out? Has a brief been agreed and is there a written agreement in place? (If asking for financial support, a fundraising agreement will be legally required and all campaigns will need a data processing agreement.)
- How will your partner help to guide and shape your campaign? What are their recommendations? (*See Working with Third Parties*).
- How will your telephone fundraisers be briefed and trained?
- What should fundraisers do if they suspect somebody they call might be vulnerable?
- Are the payment facilities and processes in place to obtain donations securely over the telephone?
- What other forms of charity support can the fundraiser offer or accept over the telephone? (This might include lower donation levels than the initial suggested amount, a different gift frequency or other forms of support such as offering to volunteer.)

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- What is the management and sign-off process for writing the messaging and for the campaign as a whole?
  - How will the calls be monitored and against what measures? (Remember that even if you outsource the calling, you will need to carry out your own call monitoring.)
  - What data will you capture during the campaign, how will it be processed and used in the future?
  - What are your reporting requirements? Consider the information you need to provide under the Charities (Protection and Social Investment) Act 2016.

#### **Responding to the needs of people in vulnerable circumstances**

When calling the public, be alert for any indicators suggesting that an individual is confused about the nature of the call or isn't able to make an informed decision, always treating the public fairly and with respect. If the fundraiser is speaking clearly and slowly, but the recipient is regularly asking for information to be repeated or cannot follow the conversation, this could be an indicator of vulnerability and a donation should not be processed.

Fundraisers should be able to pick up signs that indicate that someone is in a vulnerable circumstance or needs extra support to make an informed decision – this might include calling back at another time or communicating with that supporter by letter or email, giving them more time to consider the correspondence or discuss it with friends or relatives.

**Useful link:** [Treating Donors Fairly, Institute of Fundraising guidance](#)

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“It is vital that telephone fundraisers receive the training needed to support them, and to protect the charity. Training in compliance and protecting those in vulnerable circumstances should be refreshed at least every 6 months. A charity should look at any third party’s fundraising training programme, how it is monitored and how often refresher training is carried out.”

**Helen MacKenzie,**  
Founder & CEO, Purity

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## Training Telephone Fundraisers

Any fundraiser handling calls will need training and support. If you are using a specialist agency, their fundraisers will already have a good understanding of general telephone fundraising and compliance, however you will need to ensure they also understand the key messages of the campaign and know how to respond to other queries that may crop up. This will mean providing fundraisers with updates throughout the campaign on the charity's work and on any potentially controversial issues that may arise. It is important to engage with the training process, ideally attending or participating in relevant sessions. You will need to consider:

- How will fundraisers be trained to deliver your messaging?
- Who is best to deliver that training? Is there a campaigner, beneficiary or someone involved in the charity's service delivery that could help to inspire the team?
- What opportunities are there to demonstrate your work in action – a site visit, a helpline call?
- How will fundraisers be briefed of any changes to the campaign?
- What can you do to inspire and motivate fundraisers?

## Preparing key messages for your call

Have you drafted call guidelines or a script that includes a strong, easily communicated case for support, a thank you or other message? Remember that a script can be a useful guide and prompt for fundraisers, but that any genuine conversation will need to be flexible and free-flowing, depending on the interests and responses of the recipient.

- How will the messaging come across in an aural context? Is it written with the intention of being spoken and heard?

- What are the expectations on fundraisers making a call? How rigid must your fundraisers be in sticking to the call messaging?
- Can you imagine the call from the recipient's perspective? How will they feel when they listen to you and what can you do to ensure people feel respected and valued?
- How will the call vary for different supporter groups and how should telephone fundraisers handle any rejections?

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“Humans give to humans. It's important to allow the fundraiser's personality to shine through, to be personal but not over-bearing, and not to sound like a canned script. But make no mistake, having a script is crucial as it gives a fundraiser a pathway through the conversation. It's impossible to foresee and be able to script every conversation but a good script uses unfussy and transparent language and enables a fundraiser to move seamlessly between supporter interaction and meeting the call objective.”

**Steve Morris,**  
General Manager, Unity4

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## Call scripts or guidelines

Telephone scripts or guidelines are important to help fundraisers know what they should or shouldn't include in the call and can be a helpful prompt, particularly when it comes to the legal requirements that should be referenced during the call. But it's important to remember that conversations must feel natural. Scripts are not often read out verbatim, with the exception of required statements for data protection or Gift Aid for example.

The strength and versatility of the telephone as a fundraising medium is that it enables authentic dialogue between two individuals and this means that there needs to be flexibility in how the conversation progresses. Involve others in writing your messaging, trialling what works best and how different approaches might be perceived. Be sure to discuss with your fundraisers what the most important elements are of the call and to re-assess the script throughout the campaign, adjusting it in line with supporter and fundraiser feedback.

### Fundraising call compliance checklist

- Make sure that your fundraisers follow all the relevant parts of the Code of Fundraising Practice.
- Check that it is a convenient time to speak and that the recipient is happy to receive your call.
- State who you are calling on behalf of and why.
- Confirm that you are speaking with the correct person.
- Declare that the call is being recorded (ask if this is okay).
- Deliver a solicitation statement (if a financial ask is made).
- Make sure that fundraisers don't make a financial ask more than three times on any one call.
- Agree whether the donation is eligible for Gift Aid (where relevant).
- Summarise what has been agreed during the call.
- Ask whether the recipient is happy for the charity to call again or to receive communications by other means (where relevant).

### After the call

- What data will be collected from the call and in what format will you collect or receive it?
- What confirmation will supporters receive of their donation?
- How will you communicate next with those who signed up and those who didn't?
- What went well/what didn't? What can you learn from that?
- How will you deal with any feedback; positive or negative?
- What will you do if a supporter wants to cancel their donation?

### Tips for a good call

If you're calling the public for fundraising or marketing purposes, here are some useful tips:

- **Make the purpose of your call clear** – Whatever the reason for your call, be honest and upfront about it, making sure it is clear to the recipient.
- **Don't be embarrassed about making an ask** – If you're including an ask for funds or another form of support, don't shy away from it. Explain what you're asking for, why people's support is so important, what a difference it makes and what you hope to achieve.
- **Be real** – The call should reflect the unique tone of your charity and be delivered honestly and respectfully. Avoid fundraising clichés, taking this opportunity to tell your own tale.
- **Less is more** – It's hard to take in too much information on any one call, so keep your messaging short, helping listeners remember your key points.
- **Avoid using too many statistics** – Facts and figures can be an effective way of illustrating a point, but too many can be confusing. When you do use statistics, explain what that means in real terms.
- **Consider the call from the supporter's perspective** – The way a call is constructed and the language used is an important factor in engaging supporters and making them feel inspired and valued.
- **Show that you're listening** – Hearing what the public has to say is a huge advantage of the telephone. Encourage supporter interaction, listen to their views and be willing to explore aspects of the charity's work that they are most interested in.

- **Watch out for signs of vulnerability**
  - If you have any concerns that the individual may be confused about the nature of your call or vulnerable in any way, don't take the donation and politely end the call.

## 2. WORKING WITH THIRD PARTIES

Some charities will be well equipped to manage and deliver their telephone campaigns in-house, but many will rely on external specialists to meet their needs, providing expertise, equipment, resource and capacity.

Third parties might include telephone fundraising agencies, call monitoring specialists, data suppliers and more. Such specialists play a fundamental role in UK fundraising, inspiring millions of people to donate or support charities in different ways. The insight, innovation, and extra capacity they provide can enable you to increase and engage your supporter base, bringing the charity closer to achieving its long-term objectives.

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“Telemarketing agencies have always been an extension of who we are as an organisation and are seen as vital ambassadors and partners in helping to raise funds for our humanitarian and programmatic work around the world. It enables us to challenge each other to think differently, to test, to fail, to learn and to improve.”

**Uke Kalu,**  
Head of Direct Marketing, Care International UK

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### Are you ready to work with a partner?

- Do you have a policy in place for working with third parties?
- Have you discussed this with your trustees and are they happy for you to approach supporters in this way?
- Have you completed a risk assessment?
- How will the campaign fit with your central strategy?
- What brief will you ask them to fulfil?
- What process will you go through to select a partner?

### Identifying the right partner

If you're looking for a suitable partner to help with your telephone campaign, make sure you have a clear concept of how and why you need their support. The clearer you are about what you want to achieve, the more likely you are to be able to identify the right partner and rely on their expertise to guide you towards the best way of achieving your campaign goals.

You'll want to ensure that any partner has the expertise you're looking for, shares the same ethical values as your organisation, and has commitment to best practice. This includes how partners pay their staff and other fundraisers.

### Questions to ask when selecting your partner

- Does each potential partner have the expertise and capacity to deliver your campaign?
- What experience and track record do they have?
- When will they be able to do it and how long will it take?
- How much will it cost?
- What are the likely returns or results (both short and long term)?
- What industry standards do they adhere to?
- How do they motivate and pay their fundraisers?
- What policies are in place to protect the public, particularly those that may be vulnerable?
- What sort of data do they work with, how is it procured and screened against relevant suppression lists?
- How often will they update you about the campaign's progress?
- How will the campaign be monitored? (See more in Monitoring & Compliance).
- Can they be as passionate about the cause as you are?

### Useful links:

- [Working with Third Parties – Code of Fundraising Practice, Fundraising Regulator](#)
- [Compliance Framework, Institute of Fundraising \(IoF member benefit\)](#) – this includes guidance on working with third parties, tips on due diligence, the requirements of a fundraising agreement, monitoring and more.
- [Successful Partnerships for Sustainable Fundraising, Institute of Fundraising guidance.](#)

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### Ensuring a successful partnership

Remember that even though you are working with a partner, you have responsibilities to ensure that their work is compliant – that involves due diligence on potential partners as well as ongoing monitoring of their work. You will need to put in place a clear contract or agreement which defines the parameters of the campaign, how it will be delivered, the pricing and remuneration structure, data protection arrangements and policies for dealing with vulnerable people. You will also need to define the key performance indicators for the campaign, how it will be monitored, responsibilities for complaints handling and more.

### What to put into a successful partnership

Once you have selected and committed to a partner, it is important to trust and support them to deliver high quality fundraising and supporter care on your behalf. But a successful partnership is a two-way street and the more you put in, the more you are likely to gain. So make sure you have carefully considered not only your expectations from the campaign and how success will be monitored, but how you will support and guide the agency to get the best possible results.

This might include attending training sessions to inspire and inform those who will be calling your supporters, inviting them to see the charity's work in action or to meet beneficiaries, sending relevant updates and congratulating them on their successes. Ultimately, it is about treating your selected partner as an extension of your team, trusting them to play their part and continuing to engage and support the campaign at all stages of its development.

While results will likely include financial returns, always remember that the key outcome and advantage of telephone conversation is the ability to build and strengthen supporter relationships.

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“The most successful relationships we have with charities are those where we have developed true partnerships, with engagement at all levels from senior management to the fundraisers themselves. Face to face training with the charity, and if possible their beneficiaries, can enhance the call quality and results, as it helps build fundraiser engagement and encourage truly authentic conversations.”

**Helen MacKenzie,**  
Founder & CEO, Purity

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## 3. BEING RESPONSIBLE WITH PERSONAL DATA

Since the General Data Protection Regulation (GDPR) came into effect in May 2018, data protection has become one of the most common concerns for fundraisers. Charities have had to change the way that they manage data, which has led to more secure procedures for processing data as well as giving supporters greater control over how they are communicated with.

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“Fundraising is all about supporter relationships; supporters are the most valuable and important asset that any charity has. If an individual doesn’t want to be contacted by telephone, it’s in no-one’s interest to approach them in this way. So, when we talk about ‘data’ in this context, it’s important to remember that we’re actually talking about people and how they wish to interact with their chosen charity. Respecting each supporter’s individual wishes will ensure you foster long term relationships, leading to fulfilling supporter journeys.”

**Alex Weeks-Smyth,**

Client Services Director, Ethical

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### **Sourcing data**

The success of any telephone fundraising campaign is heavily dependent on the quality of data available. You’ll need to ensure you have a legal basis for calling, whether that is through consent or through another legal basis such as legitimate interests (*see FAQs*).

Whether you’re calling your closest supporters or those who are new to the organisation, it is important to ensure that the data is accurate, that correct permissions have been sought where necessary and that you only use the data for the purposes you state. And remember that each call will be an opportunity to update

your data, and in the case of marketing calls, to refresh contact preferences.

### **Internal data**

Look internally at your own database and identify what data you already hold and how you can use it. Do your records show which individuals have consented to hear from you about fundraising over the telephone? Could you use legitimate interests for fundraising? Are there opportunities to call for administrative purposes?

### **External data**

If you need to source data externally, look for verification that the data provider is legitimate, signed up to relevant industry bodies (such as the Direct Marketing Association) and is registered in the European Economic Area therefore subject to similar legislation. Be clear about how you can use that data, whether it’s for single or multiple use.

### **Data protection policies and statements**

It’s important to have clear policies to guide you and ensure consistency. These should include your approach to legitimate interests and whether you will use this as the basis to contact specific groups of supporters. Be aware that for marketing calls, legitimate interests will only apply to telephone numbers not registered on TPS/Corporate TPS/FPS or your own suppression lists and in every call you must offer the opportunity to opt out of future calls. If you use legitimate interests to make marketing calls, you must check your data against the relevant TPS list(s) at the beginning of the campaign and every 28 days thereafter.

If you have previously asked for consent and this was not given or has been withdrawn, you cannot then rely on legitimate interests to make the same call.

Make sure that you collect the data you need to fulfil your purpose and don’t collect information that you don’t need. Consider what you want to do now and what you want to do in the

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future and make sure that both the data you collect and the privacy notice you give, reflect this. Don't collect data 'just in case'. A data protection by design approach will assist you.

You will also need to make sure that privacy statements are clear so that those you call will fully understand how you intend to use their data, enabling you to reach the supporter group you are targeting both now and in the future.

## FAQs

### Who can you call and for what purpose?

If you're making administrative calls, you can call any of your contacts so long as you can demonstrate the legal basis you are relying on and that the purpose is consistent with what the recipient would reasonably expect.

When it comes to marketing calls, there are more stringent restrictions. You need to avoid calling anyone who has asked you not to – directly or via the FPS. You must have consent to call numbers listed on TPS and/or CTPS. Numbers not listed on these suppression lists can be called for marketing purposes so long as you comply with the legitimate interests rules and have not previously asked for consent to call those individuals, (*see below: When can you use 'legitimate interests' to make a marketing call?*)

### What is an administrative call?

A call can only be classed as administrative so long as it includes no ask for funds and no marketing of the charity or its services, this includes discussion about the work of the charity or how donations may be used. Typically, an administrative call might include a welcome or thank you call, joining instructions for event participants, verification of relevant contact or banking data for supporters and confirmation of Gift Aid eligibility and agreement.

It's important to understand that if you ask supporters for consent to call them for marketing purposes, this is deemed a marketing

call and relevant PECR (Privacy and Electronic Communications Regulations) restrictions apply.

### When can you use 'legitimate interests' to make a marketing call?

You can rely on legitimate interests as the lawful basis to make marketing calls if you have carried out and documented a legitimate interests assessment (LIA) and the number you are calling is not registered on either the TPS, CTPS, FPS or your own suppression lists. You must also ensure that you do not make calls to numbers of those individuals who you have previously asked for permission to call, but consent was either withheld or withdrawn.

### How should you handle requests not to be called again?

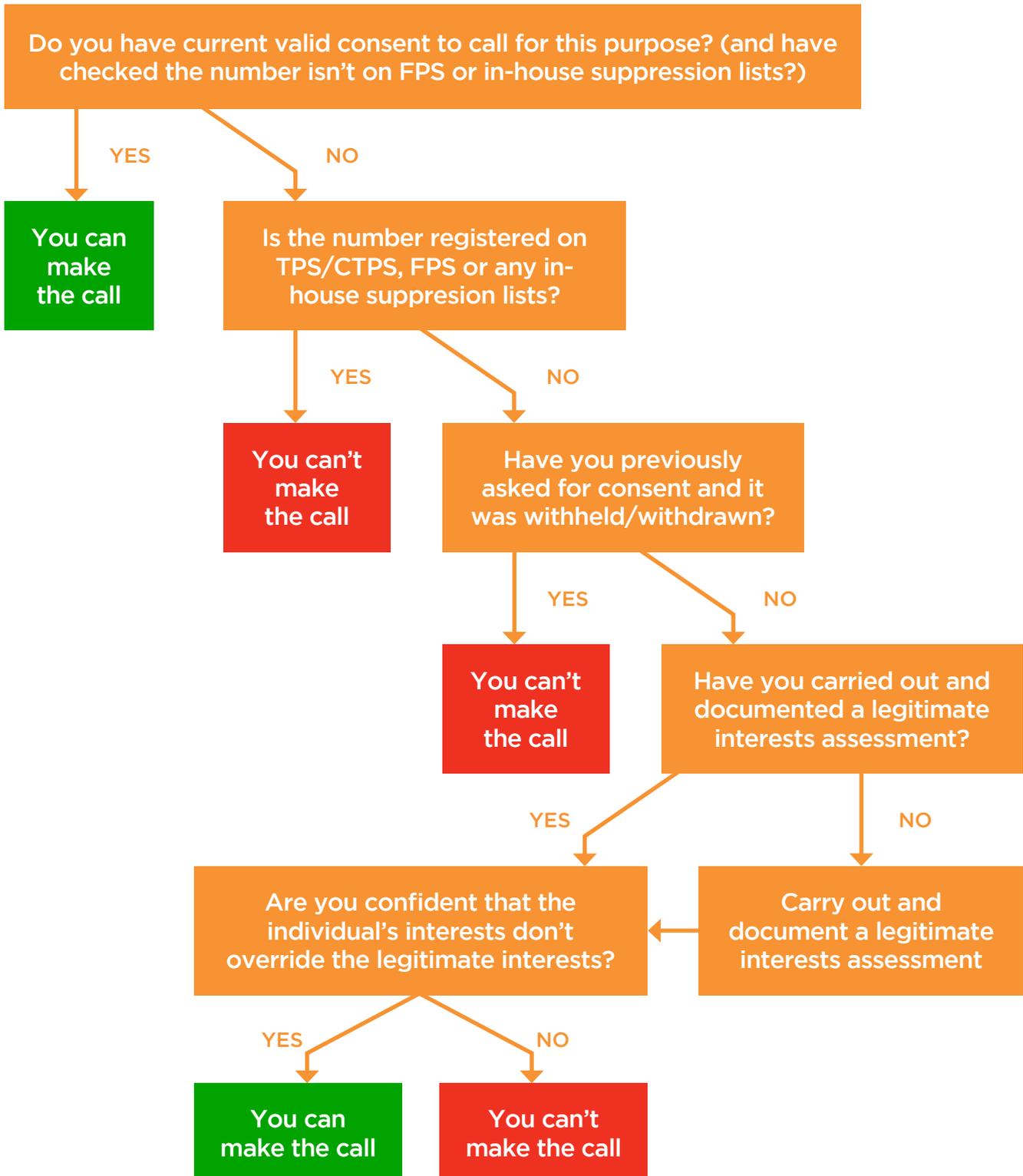
No charity will want to upset supporters or the wider public, so it's important to deal with any such request promptly. Remove anyone who doesn't wish to be called from your future call lists and clearly identify their request not to be called on your database. Ensure you and your agency have an effective way of processing this information or transferring it to the correct person responsible for actioning such requests.

#### Useful links

- [Direct Marketing Guidance](#), ICO
- [Guide to legitimate interest](#), ICO
- [PECR Guidance](#), ICO
- [Personal Information and Fundraising Guidance](#), Fundraising Regulator
- [Treating Donors Fairly Guidance](#), Institute of Fundraising

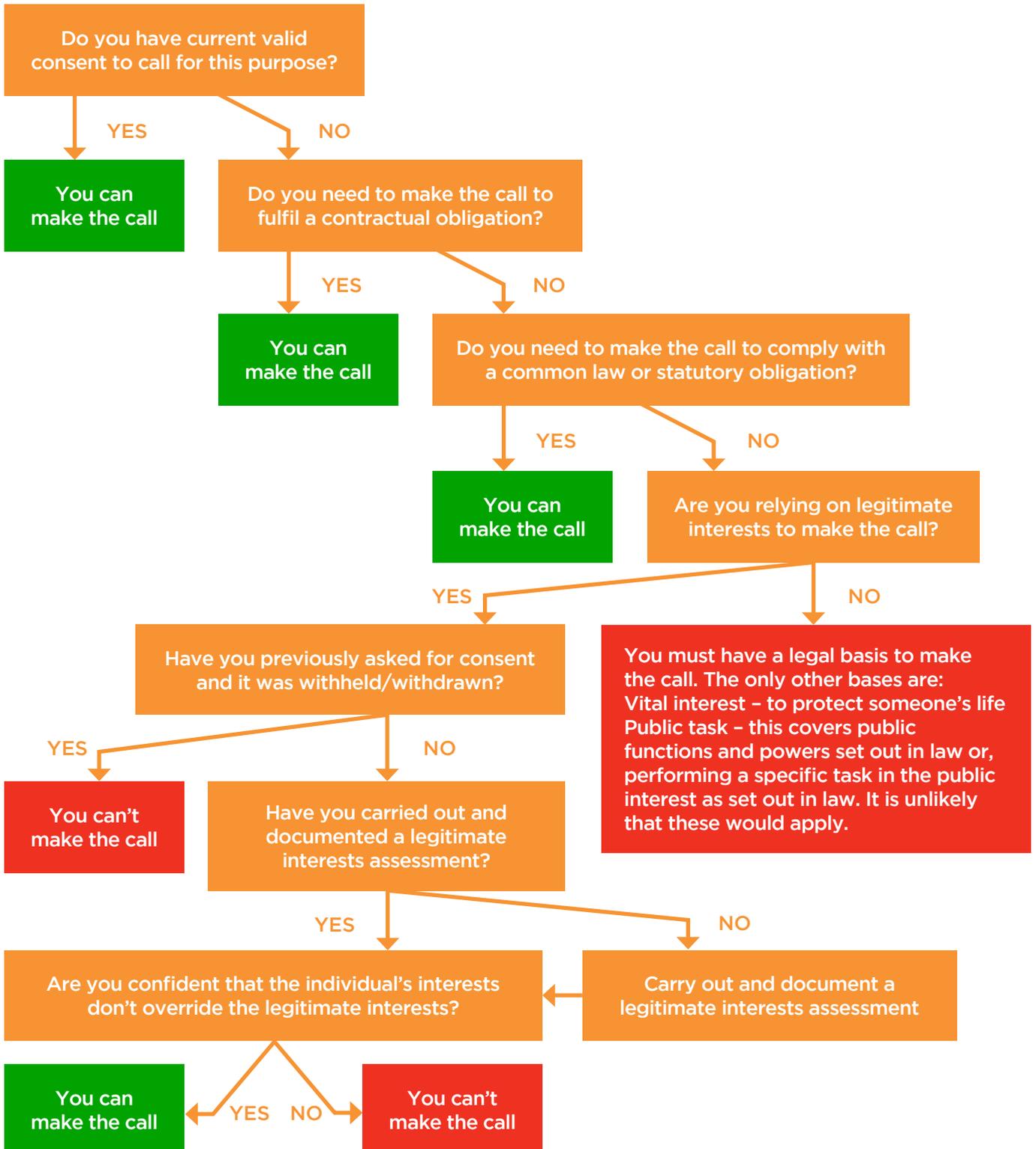
## CAN YOU MAKE THIS CALL?

Marketing calls (outbound, unsolicited calls)



## CAN YOU MAKE THIS CALL?

### Administration calls



## 4. MONITORING & COMPLIANCE

Whether you make or receive telephone fundraising calls in-house or through a partner, remember that the responsibility for protecting the public, sticking to the rules and maintaining your charity's brand and reputation sits with you. This means that you'll need to monitor campaigns to ensure they comply with the rules, industry and ethical standards, as well as pre-agreed success measures and other indicators.

If you're working with an agency, ask for their input and support. Explore with them what information they can provide and the best ways of ensuring a successful and compliant campaign.

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**“It's important for all charities to discuss with their agencies appropriate monitoring in advance. Listening to calls with colleagues is a great start, but involving the agency's account managers, compliance managers, and fundraisers, will really make the difference.”**

**Ben Smith,**  
Client Services Director, Listen

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### Monitoring Calls

It's important to regularly listen to calls and ensure that the tone, messaging and impact of your calls meets your needs. (This might include listening in to live or recorded calls). For each call listened to, document your findings and use this information to positively shape your current and future campaigns.

### Tips for monitoring campaigns:

- Listen in to calls at an early stage in the campaign so that you can get a sense of how well your messaging is conveyed and received, and whether you might want to make changes.
- Commit to listening to and monitoring calls throughout the campaign. Determine how many calls to listen to dependent on the campaign type, your risk analysis and ongoing monitoring outcomes.
- Every conversation will be different; listen to several calls to get a clear sense of how the campaign is going and to ensure legal and best practice standards are maintained.
- Make sure that it's not only one individual who listens to the calls. Including different people will bring a range of perspectives to the process.
- Ask for regular updates about how the campaign is performing against success measures and review what changes could be made.
- Track both the measurables (e.g. confirming that the fundraiser checked it was a convenient time to talk and delivered a disclosure statement) and less tangible aspects (e.g. whether the conversation was a positive interaction and built rapport).
- Put your own telephone number on the call list so that you can experience a live call from the public's perspective. Consider not only whether the call met your requirements, but how the conversation made you feel.
- Make sure that all your calls are recorded in case you need to refer back to them.
- Give constructive feedback; positive and negative insights can be equally as important to improve and inform future calls.

## Ensuring Compliance

Complying with legislation, best practice and your charity's individual ethical and organisational policies is vital to strengthen public trust. This means having clarity over the standards and policies you commit to uphold, that you inform, train and support your fundraisers and any third parties in meeting those standards, and monitoring campaigns to ensure that everything is working as it should.

### Compliance Resources:

The Institute of Fundraising offers a range of resources and services to support charities and third parties with compliance. These include:

#### Public Fundraising Certification

**Programme** – A compliance programme offering Certified Status to those that have completed the programme.

#### Call Levelling service (IoF members only) –

An e-learning programme that supports fundraisers with a series of 10 modules to improve and calibrate call monitoring skills.

#### Compliance Framework (IoF members only) –

A framework that features toolkits, examples of a call monitoring form and associated guidelines, what to include in fundraising agreements, how to carry out a risk assessment and a risk register template, as well as checklists and further guidance to help you through your compliance journey.

## Handling complaints

If you follow the Code of Fundraising Practice, you'll already have a robust complaints policy and process in place. As with all other forms of fundraising, it's essential to record any complaints about telephone calls and to deal with them diligently and swiftly, aiming to improve future supporter experiences and to enhance the campaign based on any feedback. It's important to ensure any third parties

you work with do the same and this means including the complaints handling process and responsibilities in your partnership agreement.

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“While complaints are not ideal, it's crucial to be well prepared. It's important that both charity and telephone agency agree and work to the same complaints procedure. Throughout that process the charity should feel supported and its supporters that they have been listened to and their concerns reviewed properly and thoroughly, with positive outcomes put in place to ensure complaints are minimised in the future.”

**Josephine Patterson,**  
Client Services Director,  
Mango Ethical Direct Marketing

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Don't fear complaints. The feedback can be incredibly valuable and provide great opportunities for supporter engagement. Always listen to a recording of the call in question and distinguish whether any objection relates to the channel (telephone fundraising) or the campaign itself and its messaging. Talk to your fundraisers about any feedback received, with the emphasis on celebrating success and learning where things have gone wrong.

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## 5. MYTH BUSTERS

### Is telephone fundraising intrusive?

Arguably any form of unsolicited contact is intrusive, whether that is being stopped in the street, someone knocking on your door or receiving mail, emails or accepting a call. The advantages of the telephone is that it can give people an engaging opportunity to discuss the charity's work, while giving them greater control.

Recipients can speak from the comfort of their own home, choosing whether and when they wish to talk, asking their own questions and ending the call at any point. They can choose if they want to be contacted again or not. For many people, a telephone call can be a relaxed way of learning more about an issue or charity's work; an ideal setting for positive and open conversation.

### Are people being bombarded with telephone calls?

While it is true that you won't know how many others may be calling the same number on the same day, there are rules and regulations in place which help to reduce the number of calls made and enable people to quickly and easily opt out of marketing calls. These include the TPS, FPS and call blockers like BT Call Guardian. As a result, the number of calls made within the UK have reduced and charities following best practice guidelines are more likely to have confidence that those they call are happy to hear from them.

Telephone fundraising agencies have a wealth of experience and information. Work with them to determine the maximum number of times you will try calling a number if there is no answer, what calling times are recommended and the rest time between each call.

### How can we identify and protect people in vulnerable circumstances when making telephone calls?

The telephone is unique in public fundraising as charities will already have some information about who it is that they're calling, even if it's only the recipient's contact name and number. A conversation enables you to be flexible to the needs of individuals, responding immediately and appropriately to any signs of vulnerability, helping to improve the quality of the call and ensure that potential supporters can make informed decisions. This also enables charities to add information about people's communication preferences or special needs on their database, although it's always important to be aware of the rules for handling and processing personal or sensitive data (*see [Treating Donors Fairly](#)*).

### Isn't telephone fundraising expensive/just for the big charities?

There are so many different ways that a telephone campaign can be carried out. While the objectives and budget for each campaign might vary significantly, the telephone can play a role in any charity's supporter care or fundraising programme and campaigns can be scaled accordingly from tens of supporters to tens of thousands. Talk with other charities about their experiences and investigate which third parties might be able to help you achieve your campaign goals.

## 6. USEFUL GUIDANCE AT A GLANCE

Source	Document/Resource
<b>Fundraising Regulator</b>	<a href="#">Personal Information and Fundraising: consent, purpose and transparency</a>
<b>HMRC</b>	<a href="#">HMRC Guidance for Claiming Gift Aid</a>
<b>HMRC</b>	<a href="#">HMRC Guidance on Gift Aid</a>
<b>ICO</b>	<a href="#">Direct Marketing Checklist</a>
<b>ICO</b>	<a href="#">Direct Marketing Guidance</a>
<b>ICO</b>	<a href="#">Guide to the General Data Protection Regulation (GDPR)</a>
<b>ICO</b>	<a href="#">Guide to Privacy and Electronic Communications Regulations (PECR)</a>
<b>ICO</b>	<a href="#">What is the legitimate interests basis?</a>
<b>IoF</b>	<a href="#">Compliance Framework</a> (*IoF member benefit). This includes: <ul style="list-style-type: none"> <li>• What must be included in a fundraising agreement</li> <li>• Carrying out risk assessments and template risk register</li> <li>• Example telephone fundraising monitoring form and guidelines</li> <li>• Carrying out due diligence on third parties)</li> </ul>
<b>IoF</b>	<a href="#">Call Levelling Programme</a> (*IoF member benefit)
<b>IoF</b>	<a href="#">Ethical Issues in Fundraising</a> (*IoF member benefit)
<b>IoF</b>	<a href="#">Treating Donors Fairly</a>
<b>IoF</b>	<a href="#">Successful partnerships for sustainable fundraising</a>
<b>Ofcom</b>	<a href="#">Persistent Misuse</a>

# NOTES

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**A GOOD CALL:**

USING THE TELEPHONE FOR SUCCESSFUL FUNDRAISING

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