

# Institute of Fundraising Compliance

## Directorate Site Management Handbook

### **INTRODUCTION**

This guide has a specific aim, to enable a new user to understand and competently engage in the various street fundraising diary systems without causing unnecessary delays to the process.

This guide includes a list of all National Site Diaries (NSDS) with relevant negotiation rules, and an understanding of the different types of negotiations. The guide will cover what is expected of all participants within both the 4 week cycle and the Weekly Reported Diaries (WRDs), giving examples of how to run a diary with an agreed process which is intended to help diary holders maximise negotiation efficiency. It will also cover meetings and deadlines as well as ramifications for non-engagement.

### **4 week diary cycle**

- Week 1
  - Tuesday online Scotland sites negotiation meeting (9:30am – 5pm)
  - Friday, all bids must have been submitted to [bids@institute-of-fundraising.org.uk](mailto:bids@institute-of-fundraising.org.uk) by 1pm. This includes bids for NSDs, LSM and the three Scottish period diaries.
  - IoF CD to have published all final NSD and Scotland diaries for the upcoming period by the end of the week
- Week 2
  - IoF CD to have published all NSD clash reports by the end of the week including diary management apportionment
  - IoF CD to have emailed an updated contact list for the upcoming period
- Week 3
  - Negotiations week 1
  - Tuesday, all bids must have been checked and any amendments required sent to IoF CD by 1pm
  - Tuesday online North of England sites negotiation meeting (9:30am – 5pm)
  - Wednesday, clash reports distributed to participating members by 5pm
  - Thursday, members to check that they've been included in all the diaries they bid for by 1pm
  - Friday, members to drop down to the maximum number of visits it's possible for them to secure by 5pm
- Week 4
  - Negotiations week 2

- Wednesday online South West sites negotiation meeting (9:30am – 5pm)
- Friday, all diaries must have been completed and submitted to [bids@institute-of-fundraising.org.uk](mailto:bids@institute-of-fundraising.org.uk) by 1pm

## **NSD DIARY MANAGEMENT**

### **Selecting diaries to manage**

When the clash diaries are published you will need to take your apportioned number of diaries based on your bid. The number of diaries you are required to hold is a direct proportion of the number of bids you made. The largest bids currently hold nine or ten diaries, with the smallest bids holding one or two. The number of diaries each organisation will need to take responsibility for will be published by the IoF CD. New participants will be granted a settling-in period meaning that they will not be required to hold any diaries the first time they take part.

Go to the Google Drive 'Diary Holders' spreadsheet. This is a list of all the diaries negotiated through the NSD System. Any new diaries for that period will be added to the list prior to the clash reports being sent out by the IoF CD. Each diary will have a space next to it for members to write their names to take the diary as one they will manage.

### **Running a diary**

As a diary holder, you are responsible for leading the negotiation and completing the diary before deadline.

When running a diary:

- Send the diary to all participants using the NSD contact list for the upcoming period.
- Within the body of the email copy and paste the diary from the clash report
- At the beginning of the email state the number of visits available and the number of providers. You need to account for providers who have not bid for the maximum number of visits when calculating what providers will get/need to drop to. Declare the maximum number of visits per provider (e.g. 12 visits per period, 12 providers, 1 visit each) in the subject of the email. Screenshot below.
- The subject title should be the name of the diary, the period number, the number of visits per provider and the required drop (e.g Doncaster 173 – 10 after 12 – drop to 2)
- In a diary where some providers will miss out, or some will secure more visits than others, declare who secured more visits in the last period.
- Ensure the diary is sent out before 5pm on the first Wednesday of negotiations
- As drops and moves are made, resend the updated diary as often as possible to encourage engagement, making sure the diary is coloured correctly
- When you have more providers than available spaces you need to make sure that those members who had visits more recently than others are dropping out of the diary.
- If negotiations stall include the name of the organisations who have yet to respond or are holding the diary up, in the subject of the email – remove them once a response is received
- Once the diary is free of clashes, attach a saved version of the final diary and resend to the group and add Nick Henry and [bids@institute-of-fundraising.org.uk](mailto:bids@institute-of-fundraising.org.uk) with final added to the subject (e.g Doncaster 173 – FINAL)

## **NSD deadline day**

Deadline day is when the majority of final resolutions are made for many of the diaries and as such availability between 10am and 1pm is mandatory.

## **Responsibilities of the diary holder**

As a diary holder it is your responsibility to ensure that other providers know what is expected of them and that negotiations are moving forward. You need to ensure that the appropriate providers are dropping through looking back at past periods and if someone drops out of the diary that this is taken into account in the negotiation process.

## **Responsibilities as an organisation within NSDs**

As a participant in the process, you are expected to fully engage at all times with all processes required to ensure completing the negotiation of all diaries within the 4-week cycle. If you are not available for any of the pre scheduled meetings or during the 2 weeks of negotiations, you **MUST** ensure that suitable cover is arranged.

You must:

- Check your requests have been added accurately to the clash reports. Any bids that are missing that have not been brought to the attention of the IoF CD before the deadline cannot be reinstated
- Ensure that you, or a member of your team, is available for all online meetings
- Ensure that you, or a member of your team, is fully engaged on deadline day
- Engage in diaries within the agreed timeframe to avoid delaying the process
- Release diaries that you are holding within the agreed timeframe

## **Responsibilities of the IoF CD**

The IoF CD will ensure that all new members, or new staff, are provided with the appropriate support and information to guarantee that they can positively engage.

Other duties include;

- Ensuring that all new members, or new staff, are provided with the Site Management handbook and understand the expectations
- Ensuring that all new members, or new staff, are aware of all deadlines and meetings dates
- Publishing an up to date contact list prior to each period
- Updating the google doc sheet "NSD Diary Holders" with any new additions for the upcoming period
- Publishing the apportionment for member diary management
- Setting up online meeting google docs and inviting the appropriate members

## **DIARY RULES**

The rules for diaries can vary, and there are a number of different types of negotiation.

Clashes are where there are more requests for a site that the SMA allows.

Making moves, you cannot move a request and create a clash. Whether this is moving into a site on a day that another bid is in or moving into another week when there is not free space to move in to.

There are 3 types of negotiation rule;

- **Weekly clash** – e.g. if there are 3 visits per week available, all members are clashing until there are only 3 members left in the week.
  - You can move to a free date within the week however you are still in a clash even if you are the only one on a specific date within that week until there are the correct number of requests left.
  - You can move to another week only when there are less than the maximum number of visits allowed secured.
- **Day clash** – Once you are the only member left in a day, you have secured
  - You can move to any free date within the diary to secure
- **Period/Monthly clash** – if a set number of visits are available across the whole period, nobody secures until that number is reached.
  - You can move to any free date within the period however you are still in a clash until the permitted number of requests remain.

### **ONLINE NEGOTIATION MEETINGS**

There are 3 negotiations meetings held each period. Members working in each region must ensure that they are available for the full day to ensure that all the necessary diaries are completed.

Prior to meetings taking place members must ensure that they have been sent the invitation to the meeting, if not it is their responsibility to contact the IoF CD to ensure that they have access to the diaries and that they are able to edit them.

Diaries are run in the same order each period. The running order is on a round robin basis with the person at the top of the order running the diary.

Online meetings start at 9:30am and members must be available for the whole day. If they are late for a meeting with no prior notice, or if they fail to engage for an extended period of time during the meeting, they will be removed from clashes as specified above until they are able to engage.

### **PENALTIES FOR NON-ENGAGEMENT ON DEADLINE DAY**

In the case of non-engagement on deadline day, any member which has not responded to a diary by 11am will be removed from all clashes and have excessive secured visits removed at the discretion of the diary holder, in order that the diary might be completed. Any member which is experiencing technical issues on deadline day must contact the IoF CD as a matter of urgency and provide a telephone number on which they can be contacted.

### **SCOTTISH DIARY MANAGEMENT**

#### **Period reported Scottish diaries**

These are the diaries for Edinburgh, Glasgow and Scotland Out of Town (Period reported). Members submit requests using the Scotland Request Form. IoF CD take these requests and compile clash reports

which are then uploaded onto Google Drive in time for the online meeting which takes place in Week 1 of the cycle.

### **Weekly reported Scottish diary**

This is the Scotland Out of Town (weekly reported) diary. Please refer to the Weekly Reported Diary section at the end of the document.

### **LSM DIARY MANAGEMENT**

#### **Period reported LSM**

Members submit requests using the relevant LSM Bidding Form. Members make bids by estimating as accurately as possible the number of street fundraisers they will be employing during the Period in question and then multiplying that number by 20. IoF CD then collates all the bids and runs 4 randomly generated LSM allocations per period. When this is done they are emailed to members and those members are invited to attend a swaps meeting. This is a face to face meeting at a venue in London to be decided at the time.

#### **Weekly reported LSM**

Please refer to the Weekly Reported Diary section at the end of the document.

### **WEEKLY REPORTED DIARY MANAGEMENT**

The weekly reported diaries currently consist of the Birmingham, City of London, Essex, LSM Pool and Scotland Out of Town (weekly reported) diaries. Normally members are required to make separate requests for the diaries they wish to bid for by sending an email to [bids@institute-of-fundraising.org.uk](mailto:bids@institute-of-fundraising.org.uk) no later than 3pm on a Monday for fundraising activity in the following week. When there's a bank holiday the Iof CD will announce alternative deadlines. For Scotland members should use the Scotland weekly request form, for the others they should just make their requests in the body of an email, taking care to ask for dates when fundraising is permitted to take place. Iof CD will then compile clash reports and send them out to the relevant members on Monday afternoon. Members then have until 5pm on Wednesday to resolve any clashes. Should a clash remain unresolved at 5pm on Wednesday, and one of the members in the clash is determined not to have engaged with 2 hours to go before deadline, so for example by 3pm for a 5pm deadline, that member will not be entitled to pick up anything should that diary go to fastest finger first. WLTk is considered to be engagement.