

Pell & Bales Code of Conduct

Issued 16th July 2015

Regulation, Compliance and Best Practice – adhering to all standards and guidelines, exceeding requirements to set industry best practice

- All companies in our sector should be active members of the FRSB and IoF and bound by their codes
- We have a clear set of characteristics by which we define best practice:
 - Being strict on the number of dial attempts to reach a supporter
 - Presenting Call Line Identification (CLI) so supporters have a clear opportunity to opt out if they wish
 - We publish our abandoned call and complaint rates which are consistently the lowest in the sector
 - We are receptive to supporters' wishes regarding any future contact during the call and offer a post call opt out
- We are working towards achieving TPS Assured Accreditation and the highest internationally recognised quality management systems

People – we will always employ the best people who are passionate about fundraising, acting with humility, respect and empathy

- We treat our fundraisers fairly, with respect and we are an equal opportunities employer
- We attract the best fundraisers in the industry, not just because we have the highest pay rates available but also the most stringent selection criteria and training process
- We reward our fundraisers based on call quality and donor experience, not simply on financial performance
- All our fundraisers are thoroughly tested and background checked, indeed we only work with recruitment agencies that meet our standards and more often recruit fundraisers directly

Training and Standards – we will always provide the best quality of training and development to ensure that our staff meet and exceed industry standards

- We invest considerable time and money into ensuring that our staff are the most highly trained in the industry and as such have a robust training and development programme which offers the highest standards and operating procedures in the sector
 - Our training and coaching staff all started on the phones and have received extensive training on how to support and develop both new and experienced fundraisers. Our coaching team specialise in support & development on a one to one basis. They also make fundraising calls themselves to stay in touch with the core skills required to consistently deliver quality conversations with supporters. They receive ongoing training to ensure that they are scoring & feeding back accurately & supportively.
 - P&B trainers are the experts in telephone fundraising skills, overall communication & group motivation. Our trainers receive a 3 month training program before they are able to present Fundraising Academy, briefings & other development sessions
 - We invite all the charities we work with to observe and participate in these training processes and encourage input from them at any stage

London Head Office

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Pell & Bales Limited t/a Pell & Bales Registered at Lowton Way, Hellaby S66 8RY Company No 02458312 VAT Registration No 648788860

- Our induction programme for new employees is one of the longest and most rigorous in the industry, in addition to which we provide extensive briefing and preparation sessions, devised in conjunction with charities, before fundraisers begin any campaign
- Every fundraiser receives monitoring, training and mentoring every week
- Structured feedback is received from Fundraisers on supporter interactions to support continuous improvement across scripting and training
- Our independent HR and compliance functions monitor our work and continuously assess training & development requirements for both fundraisers and the management team
- Our dedicated Vulnerable People Policy, written in accordance with industry regulators, comprehensively sets out the parameters for engaging in fundraising activity and forms a central part of our training process. The policy is wholly incorporated into daily activity by our staff who are given clear guidance on how to do this from day one of their training

Supporters and Donors - treated with respect

- We are absolute in our commitment to protection of vulnerable people and do not approach anybody who we suspect of having dementia or a related condition.
- We safeguard supporter data; protecting it, keeping it confidential and only using it when authorised to do so
- Opt outs: We enact a scrupulous process for regularly and thoroughly updating charities on changes to their donor database, ensuring that the right not to be called again is upheld and that data is used only in an ethical manner
- From joining Pell & Bales within initial training, fundraisers are introduced to our Vulnerable People Policy and given clear guidelines on situations where it is not appropriate to carry-out a fundraising ask
- We do not buy data, we only work with assured data from charities which has been checked and certified, indeed we will not start our work until this has been demonstrated
- We never pass data on to 3rd parties without the explicit consent of the supporter
- We regularly publish our complaint rates. Our donor-centric approach ensures that our rates are amongst the lowest in the sector

Strategic Partnership Approach - working with our clients: helping them to deliver the highest quality fundraising in the sector

- We continue to invest in our business, with processes and procedures under constant review to ensure that we adhere and surpass industry regulation and provide the best service to our clients. We have conscientious corporate governance that enables us to have a transparent and ethical working environment and safeguards such as disaster recovery plans which guarantees our longevity and responsibility
- Data centric approach – the use of data, analytics and to create sophisticated segmentation and tailored fundraising
- We do not purchase data but rely on our charities to ensure the information therein is properly screened
- We insist that clients play an active role our work: including, meeting fundraisers, joint authoring of materials, site visits and regular monitoring of calls.

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