



## Shelter improves bottom line by £100K per annum using TAAP software for face-to-face fundraising

### In Brief

- £100K improvement to the bottom line per annum
- First direct debit from new donors processed in 39 days - down from 55 days
- Started with 7 licences and now up to 70
- Currently used in London, Leeds and Manchester for face-to-face and door-to-door fundraising

### Background

Shelter is a charity that works to alleviate the distress caused by homelessness and bad housing. Shelter's in-house Face to Face operation team was set up in 2004. Currently Shelter receives about £2 million per annum from donors recruited using its in-house teams, which consisted of 25 fundraisers, who in 2008 recruited 10,000 regular givers.

### The Challenge

Shelter needed to improve the amount of rejected direct debit instructions and the accuracy of data collected by face-to-face fundraisers when interacting with potential

supporters. The current system of paper mandate forms being completed meant that approximately 7% of direct debits could not be processed due to incorrect bank details. Collection and transmission of data was also slower than it could be—taking an average of 55 days for the first direct debit from a new supporter to be processed.

Using paper mandate forms, often postcodes or address details could not be read due to indecipherable handwriting, so office staff would frequently need to call donors and re-check their contact details.

### The solution

TAAP provided Shelter with a software solution which operates on mobile devices and via a secure web portal which allows them to download the data collected on the PDAs.



*Menu screen for filling in supporter details, and direct debit bank checker for validation*

Shelter's face-to-face donor data had previously been collected using paper forms, so these were used as the basis for the data fields contained in the new software application. The software allows complex validation to take place - mandatory fields are always captured, and for email addresses and telephone numbers, the data is validated to make sure the information is entered in the correct format.

An integrated postcode look-up tool provides live

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reference data to verify supporter's addresses. Data is pre-formatted in certain fields so that it is always collected in a consistent format – i.e. the format of telephone numbers and email address can be checked.

### Direct debit validation

A 'bank checker' facility was incorporated to ensure that direct debit information could be captured and bank contact details are validated immediately when the supporter's account details and sort code are entered.

### Encryption and data processing

Once the data is collected on the device and saved, it is encrypted and sent through to a secure web portal which is password protected, SSL encrypted, and can be locked down to specific IP addresses. The data adheres to a specific data protocol defined by Shelter. The next stage of the project will enable Shelter's data to be sent directly from their PDAs into their back-office system using straight-through processing.

Supporter details are added to Shelter's database so they receive regular emails and postal updates.

### Personalised emails

When new supporter details are initially collected, an automatic email personalised to the supporter is sent in real-time. The name of the fundraiser the supporter signed up with is included at the bottom of the email so the message appears more personal. The email contains data from the PDA form: supporter's preferred name, donation amount/frequency, plus other 'welcome' information.

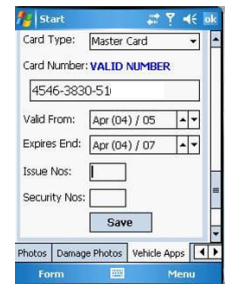
Supporters receive a welcome pack via direct mail which is delivered after the interaction has taken place, and uses the address details taken on the PDA.

### Supporter profiling

There is also a survey tab which enables Shelter fundraisers to complete three survey questions about the supporter they have recruited, so the supporter profile is enhanced. Questions relate to the supporter's housing status, employment status and whether or not they have children (dependent or non-dependent).

### One-off donations

The software also provides the ability to collect one-off credit/debit card donations – Shelter uses their bank's merchant services gateway to accept payments using the supplier's software. They initially used this service to sign people up for the Vertical Rush event, and for fundraising for the London Marathon.



One off donations by credit/debit card

### Implementation & Training

As with any new way of working, there are always issues to address before a smooth transition can be achieved. Initially, some of the established fundraisers were reluctant to use the new technology as it would take them longer to use the mobile device than it would to fill in a paper mandate form.



*"They didn't like having to use something new when they were used to paper - fundraisers hate change!! - as it took them away from their comfort zone. They did however, get over it and one of the staunch haters actually became a PDA ambassador to the rest of the team. It is also worthy of note that on the whole, new users who were told that they had to use them from the beginning were very receptive. The postcode checker and bank checker are amazing and definitely the*



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*best part of the form. The old process of filling in a paper form and hoping for the best was at best, flawed."*

**Johnathan Gray, Face to Face Manager, Shelter**

## **Devices**

The HP IPAQ Data Messenger was chosen as the initial device and while these are still being used at present, Shelter are looking at sourcing alternative devices with different keyboards as these have proven to be a little bit small.

On the whole the device has proved rugged enough for the requirements of being in an outdoor environment, although these are not the traditional "ruggedised" devices which are available for more intensely manual environments.

## **Benefits**

- **£100K improvement to bottom line per annum** - Because approximately 7% of direct debits could not previously be processed, and this problem has now disappeared
- **First direct debit processing time reduced from 55 days to 39 days** which could be further reduced to 29 days if the welcome pack is sent out by email.

*"Under our old paper based system, we couldn't process around 7% of the direct debits, because bank details could not be verified in the street. Now this problem has disappeared. This system has also dramatically speeded up the collection and transmission of data, which will improve supporter retention. Overall we estimate PDAs will improve our bottom line by about £100,000 per annum."*

**Matt Goody, Head of Direct Marketing, Shelter**

