



**PROFESSIONAL FACE TO FACE**  
FUNDRAISING ASSOCIATION

## F2F Rebuild & Recovery Plan

COVID-19

May 2020

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## 2 INTRODUCTION

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The face-to-face fundraising community stands united in the United States and around the world in our response to COVID-19. Nearly every market has experienced significant business disruption, most enduring an abrupt halt to their committed efforts to raise sustainable, reliable income for valuable and critical causes. In consideration of our respective government advisors and our commitment to our fundraisers and community safety, the channel united in one global voice to prioritize the needs of our families, our communities and our countries and the silence of face-to-face fundraising worldwide was deafening.

Face-to-face fundraising allows non-profits to build a sustainable base of support to ensure appropriate and reliable funding for vital, effective solutions through their mission-related work. Without face-to-face fundraising many non-profit organizations would be unable to provide critical services to communities across the United States and the world. The value of recurring donations from face-to-face fundraising cannot be overstated. It allows non-profit organizations to budget effectively and plan for long-term projects and programs that have the greatest impact.

Non-profit organizations have been significantly impacted by COVID-19 and these impacts are expected to threaten their mission through fundraising shortfalls this year and next. It is vital to their mission to commence fundraising activities as soon as it is safe, responsible and possible to do so.

As we prepare to reopen our country and our industry in a safe, responsible and science supported manner, we have worked to develop a plan to prioritize safety, incorporate the guidance of our government bodies and leverage the resilience of the members of our fundraising community to rebuild our channel and make our best efforts to recover from this crisis.

The PFFA does not hold itself out to have any express authority or interest to dictate or influence the business operations of our members or the larger face-to-face community. However, as the industry leaders in the sector, we have gathered best practices and strong advisements to act as a guide for member organizations. No part of this plan should be considered absolute health, legal or operational advice, or replace the necessity for independent legal counsel, as you would for any business matter of this size. Things are changing quickly, and the measures and interpretations described here may change. Our analysis is necessarily limited by the time sensitivities of the current crisis as well as the absence of precedent for some of what is contained here. This analysis represents our best interpretation and recommendations based on where things currently stand. We continue to track all developments and will update this information regularly as new information becomes available.

Lastly, the Board would like to extend a special thanks to the working group members that committed time and energy to collaborate on this plan for the channel. Thank you.

Sincerely,

Professional Face-to-Face Fundraising Association, Board of Directors

## 3 STEP ONE

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### 3.1 ASSESSING THE MARKET(S)

#### 3.1.1 Federal Guidelines

Current federal guidelines urge Americans to observe 6 feet of social distancing requirements when in public, wear facemasks when leaving their homes and not gather in groups more than 10 people. The PFFA strongly suggests these guidelines until guidelines are officially eased.

The federal government has issued guideline recommendations for states to follow in order to reopen (updated as of April 16, 2020).



**Phase 1:** All vulnerable individuals continue to stay at home. Physical distancing must be practiced in public places and non-essential travel must be minimized. If schools are closed, they should stay closed. Visiting senior living centers is still not allowed.

**Phase 2:** Non-essential travel may resume. People should avoid public gatherings of 50 or more unless physical distancing is possible. Visits to senior centers would still be prohibited, but schools and day care centers could reopen.

**Phase 3:** This would be the country's "new normal." Physical distancing in public places is still recommended, but vulnerable individuals can resume public activities. Visits to senior centers can resume.

#### 3.1.2 Government Health Guidelines



The PFFA strongly recommends that all parties planning to re-engage in face-to-face fundraising incorporate the following guidelines from OSHA/HHS and the CDC regarding the preparing of workspaces for staff:

OSHA - [OSHA Guidance on Preparing a Workplace for COVID-19](#)

CDC - [Reopening Guidance for Cleaning and Disinfecting Public Spaces, Workplaces, Businesses, Schools, and Homes](#)



The PFFA strongly recommends that all parties planning to re-engage in face-to-face fundraising incorporate the CDC guidelines for 10 Top Tips to Protect Employee's Health:

[Prepare your Small Business and Employees for the effects of COVID-19](#)

### 3.1.3 State and Local Guidelines



1. State and local stay at home or shelter in place orders lifted in the locations where fundraisers intend to carry out fundraising campaigns.
2. State and local at home or shelter in place orders lifted in any location where a fundraiser resides. For complete clarity, fundraisers may not travel from a state or any municipality that has an active stay at home or shelter in place order to work, in any capacity, with or on behalf of a fundraising campaign or administrative functions to support face-to-face fundraising in person.
3. State and local travel bans being lifted in the state intended to relaunch face-to-face fundraising activities, as well as any state from which a fundraiser would travel.
4. If federal government guidelines lack specificity, clarity or substance, state and local government guidelines should prevail.
5. Declining rates of infection, testing, tracing and other considerations in areas planned for relaunch should follow the state, local and public health agencies guidelines for recommendations regarding resuming business activities in each state.
6. In the case that government guidelines conflict with public health agencies, public health agency guidelines should take precedence.
7. All parties should consider consulting with local municipalities to ensure their plan to re-engage in face-to-face fundraising activities adheres to all legal requirements that may exist under local guidance. This may be especially important in areas where local licensing is required by local municipalities or local law enforcement to conduct face-to-face fundraising campaigns.

### 3.1.4 Identifying areas with the best prospect for relaunch



Although the PFFA is tracking data and trends related to COVID-19 across the United States, the process of identifying which cities are ready for relaunch is the responsibility of members in keeping with the process outlined within this plan. The PFFA is happy to support this effort, resources permitting.

## 3.2 CHANNEL OBLIGATION

### 3.2.1 Fundraiser and Community Safety

**The PFFA strongly advises members to have these processes and policies in place before fundraisers return to work.** The PFFA strongly suggests that all parties planning to re-engage in face-to-face prioritize

the safety of the fundraisers and the communities they work **prior** to agreeing to reopen face-to-face fundraising campaigns. The following guidelines are suggested processes to ensure, with best efforts, the safety of our teams and communities. The organization which directly employs, or contracts fundraisers should lead and require the safety protocols. Please note, these guidelines assume that local, state and federal guidelines have been lifted and people are permitted to move about freely.

1. Recommended steps to ensure fundraiser and community safety:

a. Make best efforts to ensure fundraiser has quarantined the 14 days prior to the date they are scheduled to return to work or hired to work.

b. Screening questions regarding symptoms or quarantine practices for new or returning fundraisers are acceptable with the caveat of adherence to nondiscrimination guidelines and privacy guidelines provided in Appendix 1 of this document.

c. Ensure fundraiser are confirmed to live and work in areas that have met all guidelines regarding federal, state and health safety guidelines listed under *Assessing the Market(s)* within this document.

d. Provide fundraisers with a remote call-in process that allows fundraisers to report when they are not feeling well in advance of reporting to the place of work.

i. Ensure escalation protocols are in place so that local management knows how and where to escalate this information (i.e. to HR).

ii. Ensure fundraisers are able to report having symptoms.

iii. Ensure there is a process to support fundraisers while off work and a process to allow them back to work.

e. For fundraisers who begin to experience symptoms while already at work, ensure protocols and processes for fundraisers to report these to managers and managers to escalate appropriately are in place and ensure the safety of that fundraiser, the other team members and the community.

f. Consider options for temperature taking of staff or a health questionnaire for your team to encourage people to share how they feel and invest in team safety.

g. Ensure personal health and workplace sanitation practices are incorporated into all fundraiser training, are reviewed daily and are managed to ensure adherence.

i. Topics to be included in fundraiser training.

1. Safe interaction with teammates (ensuring social distancing of at least 6 feet and avoiding contact).

2. Required personal hygiene protocols, including regular and thorough handwashing while at work, as well as hand sanitizer and disinfectant wipes.

3. Protecting your teammates and the public when you sneeze or cough.

4. Sanitizing mobile tablets and other work materials at the start and end of each shift, as well as after they come into contact with another person.

5. Daily cleaning of the office or any shared workspace. This includes, but is not limited to doors, phones, counters, work materials such as pens and staplers, workstations, clipboards, etc.

6. Deferring media inquiries while in field to your team leader or site manager.



- 7. Identifying, disengaging from and reporting, when necessary, of vulnerable populations.
- ii. Additional topics to include in management training
  - 1. Interviews should adhere to group caps and social distance requirements.
  - 2. Team meetings or nights should adhere to group caps and social distancing requirements.
  - 3. Media inquiries received should follow established protocols and be escalated accordingly.
- h. The PFFA recommends all parties work to adapt a touchless sign-up technology.
- i. When possible, the PFFA strongly recommends that teams meet outdoors and, of course, always observe social distancing (at least 6 feet) and group gathering restrictions (currently 10 people or less).
- j. Provision of hygiene products – Personal Protective Equipment (PPE)
  - i. Fundraisers should be provided the materials they need to conduct their work safely. These items may include some, or all, of the following but are not limited to this list.

Fundraiser PPE		
Face shields	Soap Sheets	Tissues/Kleenex
Face masks	Hand Sanitizer	
Protective eye wear	Disinfectant wipes	

- k. The PFFA strongly suggests members adopt regularly scheduled breaks for handwashing.
- l. The PFFA advises against the use of virtual reality head gear or any materials that would need to be shared between the fundraiser and/or members of the public.

### 3.2.2 Methods of Fundraising

- m. The PFFA would recommend all parties consider the following risks and rewards list for each type of fundraising before committing to sending field teams back out into the field on one campaign or another.

#### Traditional Street Fundraising\*

Rewards	Risks
Outdoors, low infection risk w/out direct contact	High contact rate; public restrooms, lunch, breaks
Allows passersby to self-select fundraiser engagement	Risk of fundraisers not observing ban on approaching passersby
Ease of managing personal fundraiser safety compliance	More difficult to observe social distancing

\* The working group identified that street fundraising may evolve to more resemble street theater of street tabling to address cons list and bolster contact rates.

### Private Site Tabling (outdoors)

Rewards	Risks
Outdoors, low infection risk w/out direct contact	High contact rate; public restrooms, lunch, breaks
Allows passersby to self-select fundraiser engagement	Necessity to clean table and sneeze guard after every interaction
Ease of managing personal fundraiser safety compliance	Permitting for tabling outside of private sites
Controlled optics: fundraiser could stand behind table with sneeze guard	Territory conflict with street fundraising sites

### Private Site Tabling (indoors)

Rewards	Risks
Indoors, higher infection risk	High contact rate; public restrooms, lunch, breaks
Allows passersby to self-select fundraiser engagement	Necessity to clean table and sneeze guard after every interaction
Ease of managing personal fundraiser safety compliance	Retail clientele may feel bombarded when try to do essential tasks
Controlled optics: fundraiser could stand behind table with sneeze guard	Requirement to adhere to store capacity rules
	Harder to adhere to social distancing in limited retail space

### Door-to-Door/Residential Canvassing

Rewards	Risks
Outdoors, low infection risk w/out direct contact	More difficult to manage personal fundraiser safety compliance
Provides full control to resident to open door/not	Less access to bathrooms for hand washing
Has natural social distancing built into the model	Higher chance to engage high risk people
Slower pace: allows for more time to explain & sanitize	Risk of fundraiser entering porch or home**
Better optics for nonprofit – less noticeable	May feel invasive to people in their homes
Less contact points for fundraiser (pack lunch, etc.)	

\*\* The PFFA strongly advises against fundraisers sitting on porch furniture, stoop or entering the house.

## 4 STEP TWO

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### 4.1 PROVIDING TRAINING & SUPPORT FOR PUBLIC REACTION

1. How should fundraisers and inbound call representatives handle comments or inquiry about face-to-face teams being out in the field?



- a. The PFFA recommends that all nonprofits, inbound call center representatives and face-to-face fundraising teams develop content and processes for replying to public inquiry, whether positive or negative.

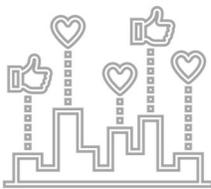
- b. The PFFA has developed messaging talking points regarding COVID-19 to assist in the development of content for response handling. Please refer to Attachment 2, *PFFA F2F Messaging + COVID19 FINAL 4.30.2020*.

2. When should fundraiser and inbound call reps escalate?

- a. The PFFA recommends that all inquiries be escalated within their relevant organizations.

- b. The PFFA recommends that all inquiries which were unable to be resolved with the response handling training referenced above, be escalated and addressed with expediency.

3. Who should support, report and follow-up on these situations?



- a. The PFFA recommends a process to support fundraisers and cell center representatives throughout their shifts to ensure a positive outcome.

- b. The PFFA recommends reporting all feedback from the public to all parties involved, as soon as possible. The PFFA would be happy to support a compilation of these inquiries so that we can provide additional support and data reporting to membership, as needed.

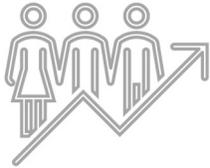
- c. The PFFA recommends that all parties take every case of feedback and apply them to their programs as learning opportunities to reduce the learning curve for all. Open communication and the practice of sharing information will best serve the channel.

## 5 STEP THREE

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### 5.1 REALLOCATING BUDGET & SOLIDIFYING CAPACITY

#### 5.1.1 Making the case for face-to-face budget re-allocation



- a. Face-to-face can scale quickly, although the PFFA recommends face-to-face be relaunched incrementally with testing in place for performance, safety and brand impact.
- b. Face-to-face is less financially risky for non-profits because it is typically billed upon results.
- c. Face-to-face provides sustainer acquisition for long-term file growth and steady income.



- d. The first win is a small one – starting with small reallocations of your pre-COVID capacity so that you can monitor quality, optics and safety compliance is recommended.
- e. Face-to-face may be needed more than usual, due to other channels likely becoming flooded and experiencing price increases due to for profit organizations re-entering the market post-COVID-19 as well as the upcoming Presidential election.
- f. Industry insulation against additional waves of COVID-19 and subsequent crisis
- g. Those in the industry are already diversifying and working to ensure they:
  - i. Reduce reliance on any one form of sustainer fundraising.
  - ii. Update and leverage technology to maximize its capabilities.
  - iii. Adopt best practices, making best efforts to minimize risk of transmission for their teams and communities.

#### 5.1.2 Solidifying capacity

1. Potential for reduced footprint for PFAs
  - a. The PFFA strongly advises agencies to enhance recruitment, training and incentive plans to ensure a balance of quality and quantity upon relaunch.
  - b. The PFFA suggests taking steps to decentivize below quality fundraiser performance or incentivize exceptional performance.



2. The PFFA acknowledges that fundraising teams may be reduced in size due to change in their work status during the crisis. It is recommended that non-profits and agencies set reasonable, concise and transparent expectations, in conjunctions with your partners, as well as establish mechanisms to accurately report on those expectations.

#### 3. Change in Fundraiser Sign-up Rates

- a. It has been reported than upon recommencement of face-to-face fundraising activities in other countries, acquisition rates per fundraiser per day have been significantly reduced,

and in others increased. The PFFA recommends that all interested parties plan to test messaging and acquisition rates upon relaunch

- b. Testing results should be regularly reviewed and evaluated.
- c. Considering testing a mixed message (i.e. COVID and non COVID related).
- d. Consider testing everything to establish new normal and reset expectations, as necessary.



## 6 STEP FOUR

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### 6.1 MARKET REOPENING

#### 6.1.1 Market-by-market availability

The PFFA advises our members to consider the recommencement of face-to-face fundraising by market. The U.S. is vast and there are areas of the country that were impacted more significantly, and at different times, than others. We believe this will result in the re-opening of markets, one at a time, and not the opening of the entire country at once. It is the responsibility of members to identify these markets and then, upon notification, the PFFA can assist in research and support to adhere to guidelines herein.

#### 6.1.2 Avoiding a “bum-rush” mentality



- a. The PFFA strongly recommends that all teams (members and nonmembers) utilize existing grids in markets that currently have them.
- b. The PFFA strongly recommends that existing site grids be used without arbitrary waiting period or other outdated hazing rules which unfairly disadvantage smaller fundraising teams (i.e. “waiting periods”).
- c. For markets that do not have an existing site grid, the PFFA strongly recommends that all parties, with a requirement for members, to notify the PFFA when it is decided to reenter a market so we can assist and support in the fair and effective management of territory to minimize risk of negative public perception, overcrowding, on-sight territory conflicts and, ultimately, brand risk.
- d. To address the concern over all items listed under this section, the PFFA recommends all interested parties collaborate.
  - i. A small-scale relaunch that can be tracked and process tested for fundraiser and community safety, performance management and brand impact.
  - ii. A gradual build over time to ensure communities do not feel overwhelmed and all nonprofits and agencies have an opportunity in markets as they reopen.

### 6.1.3 Mobile fundraisers – protecting communities



e. PFFA strongly advises members and nonmembers to prohibit the movement of teams between cities unless fundraisers meet the fundraiser and community safety criteria as detailed above.

### 6.1.4 Territory management



- e. The PFFA will facilitate and support territory management for all cities in which more than two fundraising agencies are fundraising, for members and nonmembers.
- f. As always is the case, all required licensing and registration must be secure before entering an area.

g. The PFFA strongly recommends engaging with local authorities to ensure your return to market is welcome and meets local criteria for public safety. Sharing the compliance protocols and documentation recommended in this plan will be the first step in building confidence in your plan for rebuilding and recovery in your face-to-face fundraising program, your organization, the sector and the surrounding communities.

## 7 APPENDIX 1 EMPLOYER REQUIRED TEMPERATURE CHECKS

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As the economy begins to re-open and employees return to work, can employers require employees to undergo a temperature check prior to starting their workday?

Some information & guidance from the PFFA

- The short answer is, yes, employers can lawfully take employees' body temperatures as a condition of entering the workplace. However, this is based on the current global circumstances that the COVID-19 pandemic has created.
- The CDC has issued guidance urging workplaces with risk to implement regular health checks including temperature and respiratory screening.
  - o Employee screening should be implemented on nondiscriminatory basis.
  - o All information gleaned from employee screening should be treated as confidential medical information under the ADA – specifically, the identity of workers exhibiting a fever or other symptoms should only be shared with members of company management with a true need to know.
- The main risk of employee temperature checks and screening is that these checks may not effectively identify everyone with COVID-19 because many people are asymptomatic – do not have fever and may also otherwise be contagious without experiencing symptoms.
- There are other screening techniques for employers to use to mitigate risk of contagion. For example, employers must continue to enforce handwashing, 6-foot distancing, using a mask or covering one's mouth when coughing (hygienic and public precautions).
- Make sure that you provide notice of these protocols and procedures to employees before they are implemented.
- Be clear about the threshold that employees will be sent home.
- Be sure that these protocols are administered in the least invasive way.
- Employers should consider no contact or touchless thermometers, appointing someone with training to administer them.

Currently, the CDC and OSHA have not published guidance on the topic of how to conduct these health checks. The PFFA strongly encourages members:

- to continue to follow orders, protocols and recommendations issued by the CDC and federal/state/local government and to follow OSHA COVID workplace guidance.
- to consult with attorney if they have any questions regarding planning and implementation of these protocols

\*\*The PFFA will continue to monitor and report on developments with respect to the COVID-19 pandemic and will post updates as additional information becomes available\*\*\*

## 8 ATTACHMENT 1

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The PFFA has amended the PFFA Code of Conduct to include requirements for all members. The Code of Conduct was updated on April 30, 2020 and this additional amendment will stay in effect until further notice.

## 9 ATTACHMENT 2

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The PFFA has updated is suggested messaging for members to use to support internal discussions, media messaging and/or staff training. There is an addition to suggested messaging that has been added with specific regard to COVID-19