



PROFESSIONAL FACE TO FACE FUNDRAISING ASSOCIATION

ATMS Rules of Engagement

The Rules of Engagement (ROE) apply to all PFFA members, ancillary supporters, and fee-for-service ATMS or grid participants in all markets within the United States. The requirement to follow these rules as a subsection of the PFFA Code of Conduct is not predicated on the existence of PFFA staff or services in-market, but the existence of more than one PFFA member, ancillary supporter or fee-for-service ATMS or grid participant fundraising in a market. The ROE should be viewed and interpreted in concert with the PFFA Code of Conduct, membership application, and benefit documents, as well as the Help & Documentation section of the Automated Territory Management System (ATMS).

For avoidance of doubt, these rules apply to all markets and all automated and manual territory management systems, including the ATMS and shared Google spreadsheets. Please refer to the PFFA Code of Conduct when in doubt or for need of clarity, context or application.

The PFFA serves as a neutral third-party administrator for all grids, ATMS and Google spreadsheets. All notices of market entry and requests to be added to a grid should be submitted in writing to the PFFA with two weeks' notice.

Member Access to Territory Management

1. Each Professional Fundraising Agency (PFA) with a direct charity contract and NPO members with in-house teams will be assigned one draft slot per week. One draft slot will allow the selection of four picks per day of the week on Monday and four picks per day of the week on Tuesday for a total of eight sites per day per organization.
2. Each Affiliate organization providing face-to-face fundraising acquisition services, also known as subcontractor, licensee agent or representative of the PFA, can pick within the construct of the PFA's pick allocation but do not receive their own pick until they assume direct legal responsibility through a direct contract with the nonprofit organization, as defined in the membership application and benefits documents. The PFA can allocate picks to their affiliate partners, at their full discretion.
3. Affiliate organizations may transition their membership to a PFA status per the guidelines in the Membership Application and the Membership Benefits documents. Upon completing this process, PFA access would be enacted.
4. Additional campaigns and additional teams within a market do not allow additional draft slots.
5. Fee-for-service customers will access territory management systems at the full discretion of the PFFA.



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Operation of the ATMS and Google Grids

6. There is no probation time or “waiting period” for new market entrants to get onto the site grid.
7. All site grids will operate with a 2-day draft — first round on Monday and second round on Tuesday.
8. The draft takes place one week ahead of the work week for which you are picking.
9. After the draft is complete (at close of business local time Tuesday — typically 6PM) all sites that are not selected during the draft period may be selected by all authorized organizations.
10. For the protection of charity brand and community experience, a site may only be worked by a team 2x/week. A request can be made to customize this functionality based on member consensus and market needs.
11. Draft pick order rotates each week as a snake draft — so if you have last pick this week, you will have first pick the following week, second to last the third week and second pick the next, and so on.
12. Most functionality within the ATMS is customizable. To change a standard operating feature, members fundraising within a given market must present unanimous support for the change. Features which involve charity brand, community experience and municipal overreach risk, must secure majority support from the active nonprofit campaigns in-market, in addition to the unanimous consent of the PFAs in market. Affiliates do not have voting rights in these conversations but are welcome to be part of the discussion as the discretion of their contracting PFA.
13. All members must notify the PFFA with two weeks of advance notice before entering a market to allow for appropriate set-up, training, and notification in-market.

Special Circumstances

14. In the case of special events and circumstances where a fundraising location may have specific time parameters or purpose, a member can request site privatization. If granted, this request would remove the site from the regular draft pick during the approved period. Examples of this would be marathons, walks, sporting events, etc. In lieu of the ATMS functionality, an email can be sent to the PFFA requesting the same at info@pffaus.org prior to the start of the regularly scheduled draft period during which that site could be picked for the date in question —generally two weeks’ notice to ensure this request is processed prior to the start of the weekly draft. The maximum number of days for this use is five business days per month.



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15. Private businesses are on private property and can be easily defined as such by the location for set-up being inside of the business or within the business' egress, or private property. There are times when these fundraising sites are set-up in front of a retailer on a public sidewalk as well. Regardless of private or public property, when these retail sites are located outside of the business and in proximity of an established street site (defined as when a public and retail site set-ups are within 15 feet of one another) all members are expected to either pick the street site through the regular draft process or to request a privatization of the site through the ATMS or by email request prior to the start of the regularly scheduled draft. This rule applies even when you have received the permission of a business owner to fundraise at their site.
16. A PFFA member may request site suppression for ongoing suppression of a site for a number of reasons and this request for suppression may be granted as the sole discretion of the PFFA.
17. Travel teams or business trips shall notify the PFFA with two weeks' advance notice prior to entering a market so they can be allocated picks in the regular draft process.
18. Festivals and large public events: If the festival or public event overlaps with a site on the grid and does not require registration of vendors, a member can select the site through normal draft pick process. They may share it with another vendor *if they wish to*, but the rules of the site grid apply. A festival or community event does NOT allow a free-for-all or open a site to all vendors.

If a festival or public event requires registration and payment to fundraise, then any vendor who has registered with the event organizers and paid to work a booth or kiosk at this event is entitled to access. Registering and receiving permission to vend/fundraise at the event does not take the place of the requirements of the PFFA member to notify the PFFA to suppress the site from the city site grid, assuming it overlaps with an established site grid or ATMS, so that it cannot be picked by another member during the event. This request for suppression should happen prior to the initiation of the draft for the week in which the event takes place to provide ample time to the PFFA to suppress or notify other site grid users of the manual suppression, in the case of a google grid. Site suppression will only prevent unregistered groups (with the event) from working within the parameters of the events however, if the event allows, more than one member can register for the event.



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Site Clash Escalation Process

- **Handle on site** - Check the site grid or ATMS and verify who rightfully has the territory and share this information with other party. The party that does not rightfully have the site should leave promptly.
- **Escalate to Senior Leadership** - the senior leadership of the team should be contacted by the wronged party's senior leadership to ask for their support in ensuring the offending team leaves the site.
- **Escalate to PFFA** - Senior leadership does not respond or does respond but does not resolve in 20 minutes, the PFFA can now intervene.
 - Before intervening, you should independently verify who is the rightful site holder for the day.
 - Ask the rightful site holder the details of how they attempted to contact senior leadership. Document all details and upload pictures to site clash register.
- **Escalate to charity** – the PFFA will contact the charity the offending party is representing and request their support in trying to encourage the offending team to leave the site immediately.