



**JGA**

JOHN GRAIN ASSOCIATES



# **SECRET GIVER SCHEME GUIDELINES AND REGISTRATION**

[www.johngrainassociates.com](http://www.johngrainassociates.com)

# GUIDELINES FOR MEMBERSHIP

Within these guidelines, “client” refers to the member charity and “agency” to John Grain Associates Ltd.

## Purpose & Framework

The purpose of the JGA Secret Giver scheme is to provide management information on donation processes, supporter journeys and quality of service, in order to aid strategic plans and improvements in service.



The primary objective is to help increase supporter satisfaction, advocacy and loyalty.

All work will be conducted within the law (social, tax, data protection etc.) of the UK where the fieldwork is being conducted.

Secret Giver reports should not be used as the sole justification for significant strategic changes, staff reprimands or dismissals.

John Grain Associates Ltd remains the owner of collected data from your study at all times – both during membership and if it expires. This data may be anonymously aggregated, but will never be specifically identified except directly to the client.

## Methodology & Approach

The Secret Giver scheme has no universal requirement for a minimum sample size that is representative of the entire population. In this respect, the scheme differs from Market Research where a more formal requirement to create a truly representative sample exists.



The Secret Giver scheme aims to record objectively a client's service delivery and evaluate subjectively the quality of information and materials provided as a result of making donations of various kinds. Therefore, the scope will include a significant variety of conditions of client experiences, but

which might not be strictly representative or entirely comprehensive.

Secret giving to the client will be carried out multiple times across the membership period. If possible, giving will be conducted at different times and by different methods to ensure adequate coverage of different giving conditions.

We will make every effort to ensure giving is relevant, credible, practical, ethical and objective.

The giving scenario will be designed to test the specific donation service or operational behaviour that is the topic of study.

Giving scenarios will be realistic, in that it closely represents natural supporter behaviour in the market concerned and that the secret giver can enact it convincingly. However, while secret givers will be thoroughly briefed, they should not appear too slick or over-rehearsed, or staff may guess that the donor is not a real supporter, compromising the value of the study.

Clients should show staff the benefits of the scheme and how to use the results. This helps ensure that spotting secret givers becomes less important. Staff should be made aware that ‘secret giver spotting’ is not useful or acceptable, since there is the possibility of annoying genuine donors and bringing the project into disrepute within the organisation.

As a general rule, the donation scenario itself will be straightforward, so the giver can easily understand and apply it. If required, an agency briefing will address how to handle follow-up questions, thus providing convincing ‘depth’ to the role. In addition, secret givers should fit the profile of appropriate donors, and have a level of familiarity with the charity that is appropriate to the scenario that they are required to follow.

To be ethical, the client’s own staff should be advised that their performance may be checked from time to time through secret giving. Reassurance should be given that no individual staff members will ever be identified, or any staff names included in any reports.

From an evaluation viewpoint, keeping every interaction appropriate ensures experiences are correctly reported. Consistent and regular appraisal of materials and of interactions by the same individuals (wherever possible) will help ensure objective consistency across all of the evaluations conducted. However, some subjective ratings, such as the perceived quality of content and the secret givers overall satisfaction with the way any donation or enquiry was handled, may be included and can be useful when interpreting the results. Any subjective interpretations will clearly be defined and identified as such within any reports and the client made aware of the limitations of any subjective elements within the results.

## Quality Control

All secret givers will be given sufficient guidance and briefing as required by the agency to best fulfil the purposes of the scheme. Any data collected will be validated and stored securely and in accordance with the Data Protection Act.



Secret givers will be made aware that they may be identified during the project.

Any compensation agreed will be strictly between the agency and the secret giver only. Secret givers will be reimbursed for every donation made by the agency, and the membership fee covers all the client's obligations in this respect.

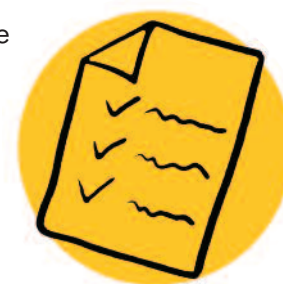
The agency will inform the secret giver of the consequences of not performing the agreed donation contacts to the required guidelines, and take any remedial action as required. Should this occur, it may potentially result in unavoidable changes of participating secret givers for some clients.

## Reports

Each report published will be strictly confidential to the client. Reports containing competitor analysis and wider benchmarking data will not identify

individual charities, as some may also be members of the scheme.

Participating secret givers will not be identified by name or by description in any published data.



Findings and recommendations will identify good practice and concentrate on improvement rather than simply focus on poor service.

Should clients desire at any time for aggregated results or broader benchmarking reports to be published (either within the scheme membership or externally), it will only be done in cases where all participants have agreed to publish. If there is no agreement from all the participating charities in the scheme then no data will be published that identifies specific participants.

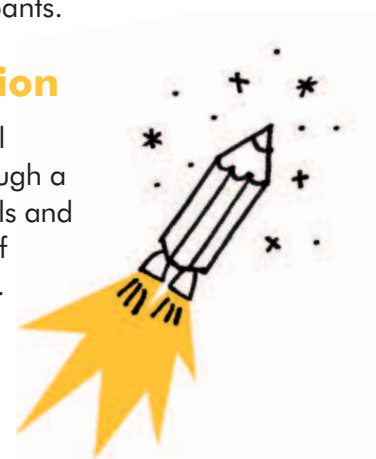
## Scheme Promotion

John Grain Associates will promote the scheme through a range of different channels and media with the purpose of recruiting more members. No existing or previous members will be publicly acknowledged without prior permission and agreement. However, it is

recognised that the larger the membership base the better the quantity and quality of data, and the more robust the findings and conclusions.

Short extracts from reports (providing they cannot be attributed to, or otherwise identify, any participant) may be used alongside testimonials, quotes, headline statistics and other data gathered provided it does not breach any client confidentiality.

John Grain Associates may use material for short articles and presentations with the client's permission and prior authorisation. A proof copy of any information to be published will be supplied for approval prior to publication.



## Consultancy | Creative | Interim | Research | Training

Honesty, transparency and collaboration are our watch words. We are fundraising specialists because we chose to be, just like you. So come and get emotional with us – we understand where you're coming from.



# Secret Giver Registration Form

Charity Name	
Contact Name	
Contact E-mail	
Contact Phone	
Approximate voluntary income including legacies (to nearest £1m)	
Approximate voluntary income excluding legacies (to nearest £1m)	

**For the purposes of the competitor review please select one area from the list below that you are most interested in being compared with.**

<input type="checkbox"/>	Animal Welfare
<input type="checkbox"/>	Armed Services / Veterans
<input type="checkbox"/>	The Arts
<input type="checkbox"/>	Child Welfare
<input type="checkbox"/>	Conservation / The Environment
<input type="checkbox"/>	Disability
<input type="checkbox"/>	Elderly
<input type="checkbox"/>	General Welfare & Emergency

<input type="checkbox"/>	Homelessness
<input type="checkbox"/>	Human Rights
<input type="checkbox"/>	Hospice / Hospital
<input type="checkbox"/>	Medical (Care/Research/Support)
<input type="checkbox"/>	Mental Health
<input type="checkbox"/>	Overseas Development
<input type="checkbox"/>	Religious / Faith Based

At times we may wish to share useful information or details with members of the scheme. Are you happy for your membership to be public within the scheme?  YES /  NO

Occasionally, we may contact you for the purposes of promoting the scheme using testimonials, quotes or brief anonymised extracts from reports. This would always be done with full client approval in advance. Please tick the box if you would rather not be contacted.

By signing you are indicating your acceptance of the Secret Giver scheme guidelines and of the John Grain Associates terms and conditions of business, and that both parties accept them as the basis for the work carried out.

Signature \_\_\_\_\_

On behalf of  
(Charity name) \_\_\_\_\_

Date \_\_\_\_\_

An invoice will be issued on receipt of this completed registration form.

Please return to:

**Jaimie Stevenson-Miller**

JGA, Con Brio, Crawborough Road, Charlbury, Oxfordshire, OX7 3TX

**E:** jaimie@johngrainassociates.com **T:** 01608 810006