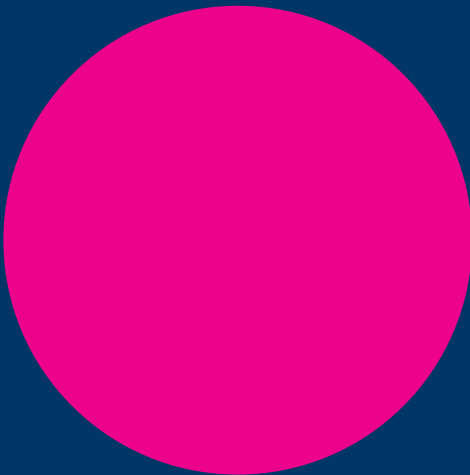
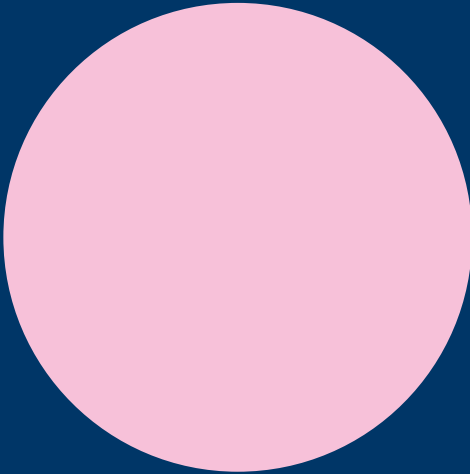
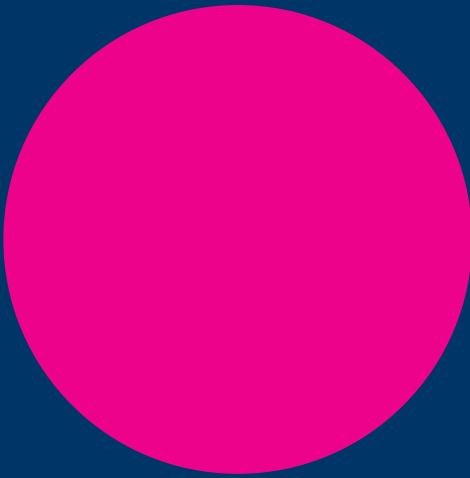


Fundraising

National
Occupational
Standards



Booklet 2
Specific fundraising standards

Introduction to booklet 2

This booklet focuses on the specific fundraising standards taken from the full set of standards. It has been designed as an introduction and we have only included the performance criteria (see introduction on the sleeve for definitions) as a place for you to start. If you want to view the full contents of the standards they can be found at: www.ukworkforcehub.org.uk/fnos08.

From the contents you will have seen the different types of fundraising specific standards that appear in this booklet. Not all of them will be relevant to your role but they have been captured here so you know where they are when you need them. If you want to work closely with the standards and identify not only what you need to do to 'perform' the role but also what you need to 'know and understand,' then refer to the full standards, (as before, see introduction for definitions).

Below each standard we give you the reference number with which to locate the standard in the full set.

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How to use booklet 2

Each standard has an overview of its content which explains the definition of the standard, for example, *Develop and implement a plan for local/community fundraising*, followed by a list of performance criteria with tick boxes. This is your opportunity to put a tick against any criteria you think you can already fulfil. If you have not ticked a box, you might want to consider this as an area you could develop as part of your role. Or you might think it isn't applicable to you, in which case you can leave this and move onto the next one.

This exercise works in two ways;

- It can help to build up your CV because you will realise how much you do as part of your role.
- It will also identify gaps in your current methods of working.

Managers can therefore use this process in order to appraise a fundraiser.

Other booklets located in this pack

Booklet 1

Core fundraising standards

This covers the core standards that fundraisers will need to be working towards in order for them to feel competent in their role. For example, *Receive and process donations*, *Manage data to support fundraising*, *Conduct a fundraising audit*, etc.

Booklet 3

Sources of useful information

Don't forget to take a look at this, there is plenty of good guidance to help you to learn, develop and engage with others in the field of fundraising. The booklet has a lot of useful information as well as a helpful glossary of some of the terms used in this pack.

For convenience, we have only listed the performance criteria within each standard. If you want to see the full content of a standard which includes the knowledge and understanding, we recommend you consult the full set of standards:

www.ukworkforcehub.org.uk/fnos08

Develop and implement a plan for local/community fundraising

Overview

This may include fundraising by schools, fundraising within local organisations/community groups, street and house-to-house collections, and fundraising by Churches and at local/community events.

You will need to plan your approach to achieve the fundraising objective(s) for which you are responsible. Good planning is essential and requires a great deal of attention at an early stage.

You need to develop a clear and achievable plan to generate community support, involving others where possible. It will identify how you are going to secure funds and resources from the community, the methods you will use, your resource requirements and what you expect to achieve as a result.

It is likely that your plan will form part of an overall strategy.

For the complete standard please see **F9** in the full set of standards:
www.ukworkforcehub.org.uk/fnos08

Performance criteria

✔ To plan local/community fundraising activity you must:
<input type="checkbox"/> 01 Clarify the scope of your responsibilities and what is expected of you in terms of fundraising targets.
<input type="checkbox"/> 02 Review the local/community fundraising environment, identifying appropriate fundraising opportunities.
<input type="checkbox"/> 03 Conduct a review of the performance of past local/community fundraising activity.
<input type="checkbox"/> 04 Establish a timescale, objectives for the local/community fundraising plan, and appropriate fundraising techniques in accordance with the available resources including the available staff/volunteer time.
<input type="checkbox"/> 05 Develop appropriate case(s) for support.
<input type="checkbox"/> 06 Discuss your fundraising plan with your line manager and other relevant colleagues/stakeholders and seek authorisation for its go-ahead as necessary.
<input type="checkbox"/> 07 Ensure the integrity and security of any proposed donation collection processes.
<input type="checkbox"/> 08 Ensure that any relevant legal and ethical requirements have been met.
<input type="checkbox"/> 09 Ensure that (if appropriate) your plan takes account of your organisation's policies and practices regarding the management of volunteers.
<input type="checkbox"/> 10 Co-ordinate with other areas of fundraising to ensure that there is no duplication of effort in approaching a particular organisation or individual.
<input type="checkbox"/> 11 Maintain records of potential sources of community support for current and future purposes.
To implement a plan for local/community fundraising activity you must:
<input type="checkbox"/> 12 Ensure your plan includes details on what you aim to achieve, how, by whom and by when.
<input type="checkbox"/> 13 Build in an ability to measure and control your fundraising plan for evaluation purposes.
<input type="checkbox"/> 14 Monitor the implementation of your plan and evaluate its success.
<input type="checkbox"/> 15 Maintain and update database records.
<input type="checkbox"/> 16 Keep a record of community outreach activity, connections, and relationships for current and future purposes.

Develop and implement a plan for fundraising events

Overview

This is about raising funds and/or acquiring potential donors through fundraising events. These may be one-off, annual or challenge events.

You will need to plan your approach to achieve the fundraising objective(s) for which you are responsible. Good planning and accurate budgeting is essential and requires a great deal of attention at an early stage.

You need to develop a clear and achievable plan to generate income and contribute to other agreed objectives through event(s), consulting with colleagues and other stakeholders where feasible. It will identify the purpose and nature of the event(s), how participants will be recruited, how the event(s) will be managed and the follow-up activities that will be undertaken.

Your plan may also form part of a wider fundraising/profile raising strategy.

For the complete standard please see **F10** in the full set of standards:
www.ukworkforcehub.org.uk/fnos08

Performance criteria

<input checked="" type="checkbox"/>	To plan fundraising events you must:
<input type="checkbox"/>	01 Clarify the scope of your responsibilities and what is expected of you in terms of fundraising and other targets.
<input type="checkbox"/>	02 Review the event activity of other non-profits working in your geographical area and/or with the same category of cause.
<input type="checkbox"/>	03 Conduct a review of the performance of past event fundraising activity within your organisation.
<input type="checkbox"/>	04 Establish a timescale (for planning) and objectives for the fundraising event(s).
<input type="checkbox"/>	05 Develop appropriate case(s) for support, event themes and publicity routes.
<input type="checkbox"/>	06 Select appropriate techniques and processes to solicit participation, support and contributions, working with colleagues and other stakeholders where necessary.
<input type="checkbox"/>	07 Establish and maintain appropriate systems and processes to deal with event enquiries.
<input type="checkbox"/>	08 Establish and maintain appropriate systems/processes to manage income, expenditure and return on investment.
<input type="checkbox"/>	09 Plan the details of how the event will be managed, taking into account the available human and financial resources.
<input type="checkbox"/>	10 Plan for additional staff and volunteer support as appropriate.
<input type="checkbox"/>	11 Brief, liaise with and manage third party suppliers/internal suppliers of specialist, logistical and/or technical support as appropriate.
<input type="checkbox"/>	12 Put in place a budget which can be monitored/updated as the implementation of the plan progresses.
<input checked="" type="checkbox"/>	To implement a plan for a fundraising event you must:
<input type="checkbox"/>	13 Discuss your fundraising plan with your line manager and other relevant colleagues/stakeholders and seek authorisation for its go-ahead as necessary.
<input type="checkbox"/>	14 Build in an ability to measure and control your event plan for evaluation purposes.
<input type="checkbox"/>	15 Liaise with colleagues throughout the organisation to identify opportunities for event promotion, sponsorship and publicity.
<input type="checkbox"/>	16 Liaise with colleagues internally to ensure that benefits from the event can be maximised internally, e.g. for major donor cultivation /stewardship.
<input type="checkbox"/>	17 Brief, liaise with and manage third party suppliers and other partners/contributors as appropriate.
<input type="checkbox"/>	18 Implement the fundraising plan according to its steps and schedule.
<input type="checkbox"/>	19 Maintain and update manual or database records.
<input type="checkbox"/>	20 Monitor the implementation of your event plan and budget, analyse its performance on an ongoing basis and evaluate its success.

Develop and implement a plan for legacy fundraising

Overview

You will need to plan your approach to achieve the fundraising objective(s) for which you are responsible. Good planning is essential, especially in the case of legacy fundraising as legacy gifts are typically the product of a very long term association between an individual and an organisation.

You need to develop a clear and achievable plan to generate legacy support, consulting with colleagues and other stakeholders where possible. It will cover how you are going to identify prospective legators/audiences, the communication and fundraising methods you will use, your resource requirements and what you expect to achieve as a result. In this context you will not be able to assess the quality of your work by the income you generate, but will need to incorporate a variety of other measures.

It is likely that your plan will form part of an overall strategy within your organisation.

For the complete standard please see **F11** in the full set of standards:
www.ukworkforcehub.org.uk/fnos08

Performance criteria

<input checked="" type="checkbox"/>	To search for information you must:
<input type="checkbox"/>	01 Clarify the scope of your responsibilities, what is expected of you in terms of targets and how performance will be measured.
<input type="checkbox"/>	02 Review the legacy gift environment, identifying relevant trends, critical issues and giving patterns.
<input type="checkbox"/>	03 Conduct a review of the performance of past legacy promotion and fundraising activity within your organisation.
<input type="checkbox"/>	04 Establish a timescale, objectives and measures for the legacy fundraising plan.
<input type="checkbox"/>	05 Conduct research into potential legators and identify suitable prospects/segments.
<input type="checkbox"/>	06 Select appropriate communication and solicitation strategies, working with your line manager and other colleagues as necessary.
<input type="checkbox"/>	07 Liaise with colleagues throughout the organisation to identify opportunities for legacy promotion and integration of the legacy fundraising message.
<input type="checkbox"/>	08 Plan, where appropriate, to provide recognition for legacy donors and pledgers.
<input checked="" type="checkbox"/>	To search for information you must:
<input type="checkbox"/>	09 Ensure your plan includes details on what you plan to achieve, how, by whom and by when.
<input type="checkbox"/>	10 Build in the ability to measure and control your fundraising plan for evaluation purposes.
<input type="checkbox"/>	11 Brief, liaise with and manage third party suppliers and other partners as appropriate.
<input type="checkbox"/>	12 Discuss your fundraising plan with your line manager and other relevant colleagues/stakeholders and seek authorisation for its go-ahead as necessary.
<input type="checkbox"/>	13 Implement the fundraising plan according to its steps and schedule.
<input type="checkbox"/>	14 Maintain and update database records as appropriate.
<input type="checkbox"/>	15 Monitor the implementation of your plan and evaluate its success.

Develop and implement a plan for corporate fundraising activity

Overview

This is about raising funds and other resources from corporate supporters. Support may include monetary donations, gifts in kind, donations of staff time/staff secondments, access to staff for fundraising activities, partnerships, payroll giving, sponsorship or cause-related marketing.

You will need to plan your approach to achieve the fundraising objective(s) for which you are responsible. Good planning is essential and requires a great deal of attention at an early stage.

You need to develop a clear and achievable plan to generate corporate support, involving other colleagues/stakeholders where possible in the planning process. It will identify how you are going to secure funds and other resources from corporate supporters, the methods you will use, resource requirements and what you expect to achieve as a result.

For the complete standard please see **F12** in the full set of standards:

www.ukworkforcehub.org.uk/fnos08

Performance criteria

- ✓ **To plan corporate fundraising activity you must:**
 - 01** Clarify the scope of your responsibilities and what is expected of you in terms of fundraising targets.
 - 02** Review the corporate fundraising environment, identifying relevant trends, critical issues, competitor activity and giving patterns.
 - 03** Conduct a review of the performance of past corporate fundraising and other relevant commercial activity.
 - 04** Establish a timescale and objectives for the corporate fundraising plan.
 - 05** Conduct prospect research and prioritise potential supporters.
 - 06** Develop appropriate case(s) for support.
 - 07** Select appropriate fundraising techniques and approaches in accordance with the available resources.
 - 08** Input information into a database as required by the relevant person(s).
 - 09** Maintain records of potential sources of funding and resources as you identify them for future purposes.
- To implement a plan for corporate fundraising activity you must:**
 - 10** Ensure your plan includes details on what you plan to achieve, how, by whom and by when.
 - 11** Ensure that the businesses approached and agreements made are consistent with any ethical policy your organisation holds.
 - 12** Negotiate appropriate relationships with corporate supporters that are consistent with their needs, the aims of your organisation and the value of your brand.
 - 13** Communicate the requirements and expectations of the corporate supporter to the relevant people within your organisation, including any requirement for match funding.
 - 14** Co-ordinate with colleagues working in other areas of fundraising to ensure that there is no duplication of effort in approaching particular individuals/organisations for support.
 - 15** Implement the fundraising plan according to its steps and schedule.
 - 16** Build in an ability to measure and control your fundraising plan for evaluation purposes.
 - 17** Maintain and update records.
 - 18** Monitor the implementation of your plan and evaluate its success.

Develop and implement a plan for the generation of grant income

Overview

You will need to plan your approach in order to achieve the fundraising objective(s) for which you are responsible.

You need to develop a clear and achievable plan to generate grant income which will identify the purposes for which funding will be sought. How you are going to secure the necessary funds and the timescales you will be working to? It will be important to consider the funding cycles and grant criteria of potential funders and to use this knowledge to shape and schedule the generation of appropriate proposals. You will also need to consider the resource implications of your plan, including the time you and members of your team need to allocate to the task.

It is likely that your plan will form part of an overall strategy within your organisation.

For the complete standard please see **F13** in the full set of standards:

www.ukworkforcehub.org.uk/fnos08

Performance criteria

- ✓ **To plan for the generation of grant income you must:**
 - 01** Clarify the scope of your responsibilities and what is expected of you in terms of fundraising targets.
 - 02** Conduct a review of the performance of past grant fundraising activity.
 - 03** Liaise with the service-provision team to identify potential projects/areas of work that might attract grant support.
 - 04** Ensure that you have access to relevant internal and external sources of networking.
 - 05** Assemble all the information necessary to compile the case for support.
 - 06** Establish a timescale and financial objectives for the plan.
 - 07** Co-ordinate with colleagues working in other areas of fundraising to ensure that there is no duplication of effort in approaching a particular organisation.
 - 08** Conduct research and prioritise potential grant makers.
 - 09** Discuss your plan with your line manager/other colleagues and seek authorisation for its submission as necessary.
 - 10** Maintain records of potential sources of funding and resources as you identify them for future purposes.
- To implement a plan for the generation of grant income you must:**
 - 11** Ensure your plan includes details on what you plan to achieve, how, by whom and by when.
 - 12** Communicate the requirements and expectations of the grant maker to the relevant people within your organisation, including any requirement for match funding.
 - 13** Write proposals and/or complete applications for grant funding, working with relevant colleagues/departments as appropriate.
 - 14** Build in an ability to measure and control your activities for evaluation purposes.
 - 15** Monitor the implementation of your plan and evaluate its success.
 - 16** Working with relevant colleagues/other stakeholders, prepare any progress reports or evaluation documentation that might be required by a grant maker.
 - 17** Maintain records of contacts at grant making organisations to ensure that they receive appropriate development communications such as invitations to events, etc.

Develop and implement a plan for major gift fundraising

Overview

Major gifts are typically of high value and solicited personally by a fundraiser, senior staff/trustees, or some combination of these individuals.

Early planning is particularly important in major donor cultivation, since most major gifts come as a result of a long-term relationship between the donor and the relevant persons in an organisation.

You need to develop a clear and achievable long-term plan to generate major gift support, involving colleagues and other stakeholders wherever possible in the planning process.

It is likely that your plan will form part of an overall strategy within your organisation.

For the complete standard please see **F14** in the full set of standards:

www.ukworkforcehub.org.uk/fnos08

Performance criteria

- ✓ **To plan major gift fundraising activity you must:**
 - 01** Clarify the scope of your responsibilities and what is expected of you in terms of fundraising targets.
 - 02** Review the major gift fundraising environment, identifying relevant trends, critical issues and giving patterns in order to identify and/or create appropriate major gift fundraising opportunities.
 - 03** Conduct a review of the performance of past major gift fundraising activity.
 - 04** Work closely with service delivery colleagues to establish funding priorities for the organisation and to help develop an appropriate case for support.
 - 05** Conduct prospect research using appropriate internal and external sources of information.
 - 06** Establish a timescale and objectives for the major gift fundraising plan, and appropriate fundraising techniques in accordance with the available resources including the available staff/volunteer time.
 - 07** Research and understand what motivates major donors to offer support, both in general terms and, as far as possible, with reference to individual donors/prospects.
 - 08** Ensure that you have access to all relevant sources of networking and information to identify and cultivate new prospects.
 - 09** Ensure that you have the understanding and buy-in of senior management and volunteers in the major donor fundraising process.
 - 10** Evaluate and prioritise potential supporters for cultivation.
 - 11** Develop appropriate case(s) for support, e.g. for the organisation as a whole, for the programmes you are seeking to fund and for the individual supporters you will be approaching.
 - 12** Select and implement appropriate solicitation strategies.
 - 13** Select appropriate recognition tools and strategies.
 - 14** Work with other colleagues/stakeholders within the organisation in the cultivation and stewardship of major donors.
 - 15** Co-ordinate with other areas of fundraising (e.g. trusts and corporate) to ensure that there is no duplication of effort in approaching a particular individual and that the approach is appropriate.
 - 16** Maintain records of potential sources of funding and resources as you identify them for future purposes.

- ✓ **To implement a plan for major gift fundraising activity you must:**
 - 17** Ensure your plan includes details on what you plan to achieve, how, by whom and by when.
 - 18** Implement the fundraising plan according to its steps and schedule.
 - 19** Build in an ability to measure and control your fundraising plan for evaluation purposes.
 - 20** Discuss your fundraising plan with your line manager and other relevant colleagues/stakeholders and seek authorisation for its go-ahead as necessary.
 - 21** Develop a stewardship and recognition plan for each major donor.
 - 22** Maintain and update database records.
 - 23** Monitor the implementation of your plan and evaluate its success.
 - 24** Keep a record of contacts, connections, and relationships with current or potential major gift donors for current and future fundraising purposes.

Develop and implement a plan for fundraising through electronic media

Overview

This is about raising funds through electronic media such as the Internet, e-mail, and mobile technologies like text messaging. Collectively this is referred to as 'e-fundraising.'

You will need to plan your approach to achieve the fundraising objective(s) for which you are responsible. Good planning is essential and requires a great deal of attention at an early stage.

You need to develop a clear and achievable plan to generate income through electronic media, consulting with colleagues and other stakeholders where feasible. It will identify the fundraising and communication methods you will use, your resource requirements and what you expect to achieve as a result.

For the complete standard please see **F15** in the full set of standards:
www.ukworkforcehub.org.uk/fnos08

Performance criteria

✓ To plan e-fundraising activity you must:
<input type="checkbox"/> 01 Clarify the scope of your responsibilities and what is expected of you in terms of fundraising targets.
<input type="checkbox"/> 02 Review and measure the electronic giving environment, identifying relevant trends, critical issues, giving patterns.
<input type="checkbox"/> 03 Conduct a review of the performance of past e-fundraising activity.
<input type="checkbox"/> 04 Establish a timescale and objectives for the e-fundraising plan.
<input type="checkbox"/> 05 Identify and agree the electronic medium/media best suited to communicating to the target donor group.
<input type="checkbox"/> 06 Develop appropriate case(s) for support.
<input type="checkbox"/> 07 Identify and create data collection and reporting systems, with relevant links to the fundraising database, to fulfil agreed monitoring, response and quality assurance requirements.
<input type="checkbox"/> 08 Brief, liaise with and manage third party suppliers/internal suppliers of specialist and technical support as appropriate.
✓ To implement a plan for e-fundraising activity you must:
<input type="checkbox"/> 09 Ensure your plan includes details on what you plan to achieve, how, by whom and by when.
<input type="checkbox"/> 10 Ensure you build in an ability to measure and control your e-fundraising plan for evaluation purposes.
<input type="checkbox"/> 11 Discuss your fundraising plan with your line manager and other relevant colleagues/stakeholders and seek authorisation for its go-ahead as necessary.
<input type="checkbox"/> 12 Implement the fundraising plan according to its steps and schedule.
<input type="checkbox"/> 13 Maintain, enhance and update database records as appropriate.
<input type="checkbox"/> 14 Monitor the implementation of your plan and evaluate its success.

Develop and implement a plan for the recruitment of donors using direct marketing media

Overview

This is about acquiring new donors through direct marketing channels.

You will need to plan your approach to achieve the fundraising objective(s) for which you are responsible. Good planning is essential and requires a great deal of attention at an early stage.

You need to develop a clear and achievable plan to acquire new donors through direct marketing channels. These might include direct mail, inserts, door drops, telephone fundraising, direct dialogue, press advertising, radio or direct response television advertising.

The plan will specify recruitment objectives, segmentation/targeting, media selection, the case(s) for support, budget, timescales and the campaign measures/indicators that will be employed.

It is likely that your plan will form part of an overall strategy for which is someone else's responsibility.

This unit covers:

- Planning donor recruitment activity through direct marketing
- Implementing donor recruitment activity through direct marketing

For the complete standard please see **F16** in the full set of standards:
www.ukworkforcehub.org.uk/fnos08

Performance criteria

✓ To plan donor recruitment activity using direct marketing media you must:
<input type="checkbox"/> 01 Clarify the scope of your responsibilities and what is expected of you in terms of fundraising recruitment targets.
<input type="checkbox"/> 02 Review the current direct marketing environment identifying trends, critical issues and giving patterns.
<input type="checkbox"/> 03 Conduct a review of the performance of past direct marketing fundraising activity.
<input type="checkbox"/> 04 Establish a timescale, objectives and budget for the direct marketing recruitment plan.
<input type="checkbox"/> 05 Define the target segment(s) of donors.
<input type="checkbox"/> 06 Identify any opportunities for tailoring the case for support and solicitation propositions to address particular target segments/audiences.
<input type="checkbox"/> 07 Identify any relevant test plans and their objectives.
<input type="checkbox"/> 08 Select appropriate recruitment techniques for each segment in accordance with the available resources.
<input type="checkbox"/> 09 Develop appropriate case(s) for support and solicitation propositions.
<input type="checkbox"/> 10 Brief, liaise with and manage third party suppliers/internal suppliers of specialist, logistical and/or technical support as appropriate.
✓ To implement a plan for donor recruitment activity you must:
<input type="checkbox"/> 11 Ensure your plan includes details on what you plan to achieve, how, by whom and by when.
<input type="checkbox"/> 12 Build in appropriate campaign metrics to measure and control your plan for evaluation and budgetary purposes.
<input type="checkbox"/> 13 Ensure that you amend the strategy/tactics in the light of the results of any tests undertaken.
<input type="checkbox"/> 14 Brief, liaise with and manage third party suppliers as appropriate.
<input type="checkbox"/> 15 Discuss your fundraising plan with your line manager and other relevant colleagues/stakeholders and seek authorisation for its go ahead as necessary.
<input type="checkbox"/> 16 Implement the fundraising plan according to its steps and schedule.
<input type="checkbox"/> 17 Maintain and update records.
<input type="checkbox"/> 18 Monitor the implementation of your plan and evaluate its success.



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