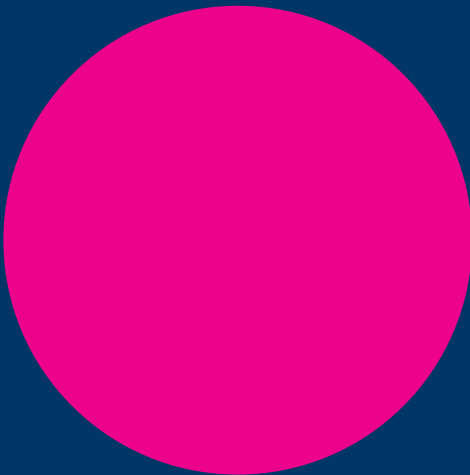
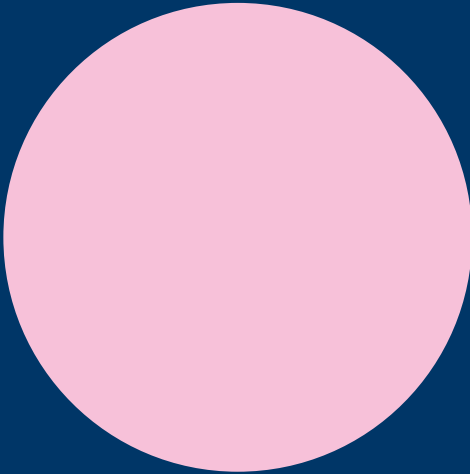
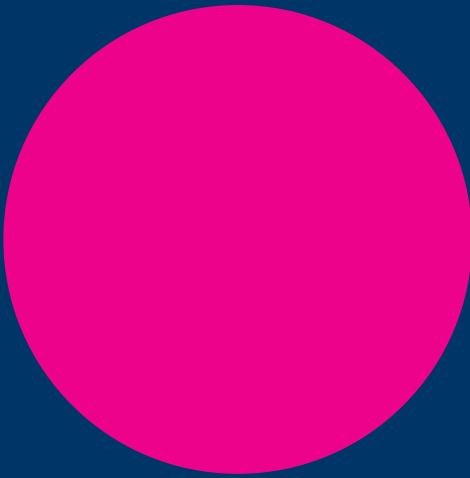


Fundraising

National
Occupational
Standards



Booklet 1
Core fundraising standards

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Introduction to booklet 1

This booklet focuses on the core fundraising standards taken from the full set of standards. It has been designed as an introduction to standards and we have only included the performance criteria (see introduction to this pack for definitions) as a place for you to start.

We would recommend anyone in a fundraising role to take a look at each standard in this book. 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' within the role, then refer to the full standards. They can be found at: www.ukworkforcehub.org.uk/fnos08 (As before, see introduction for definitions).

At the bottom of each standard we give you the reference number in which to locate the standard in the full set; and also some signposting to the other standards that might relate to the one you have looked at but not included here.

How to use booklet 1

Each standard begins with an overview to indicate its scope and contents – for example *Conduct a fundraising audit* – 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 also use this process in order to appraise a fundraiser.

Other booklets located in this pack

Booklet 2

Specific fundraising standards
This contains the standards for fundraisers working on specific areas of fundraising such as major gift, community events, grant making, 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 about the role, we recommend you consult the full set of standards:

www.ukworkforcehub.org.uk/fnos08

Conduct a fundraising audit

Overview

The fundraising audit should comprise a thorough strategic appraisal of the wider environment in which the organisation is operating; a competitor analysis; an analysis of potential collaborators (where appropriate); and an assessment of each of the key supporter markets in which the organisation is operating. The audit should also contain an appraisal of the past performance of the organisation's fundraising activity, the strategy and tactics pursued and the impact on the supporter base.

An audit concludes with a detailed SWOT (Strengths, Weaknesses, Opportunities and Threats) analysis which summarises the data gathered and presents it in a form that can subsequently be used to inform fundraising planning.

For the complete standard please see **F18** in the full set of standards:
www.ukworkforcehub.org.uk/fnos08

Performance criteria

- To conduct a fundraising audit you must:**
- 01** Develop systems to gather and manage information and knowledge effectively, efficiently and ethically.
 - 02** Identify and evaluate relevant trends and developments, including those covering demographic, attitudinal, political, economic, social, cultural, regulatory and technological developments.
 - 03** Review the fundraising activity of competitor organisations (e.g. non-profits of a similar size, working in a similar field, or involved in creative/innovative fundraising practice).
 - 04** Review the potential to collaborate with other organisations for the purposes of fundraising.
 - 05** Conduct an analysis of the critical issues, trends and giving patterns in each of the supporter markets the organisation is presently operating (e.g. corporate, trust/foundation, major gift, community fundraising, etc.).
 - 06** Conduct a review of the impact of the organisation and the corresponding case for support, giving consideration to new and alternative ways of presenting the organisation that may appeal to new supporter markets.
 - 07** Conduct a review of your own organisation's past fundraising performance and assess the suitability of the organisation's present portfolio of activities.
 - 08** Conduct a review of the appropriateness of your organisation's fundraising structure, systems, processes and procedures for supporter care.
 - 09** Conduct a review of the appropriateness of the organisation's financial, human and technological resources (e.g. database systems) available to the fundraising function.
 - 10** Conduct a SWOT analysis of the preceding audit data and prioritise and interpret your findings.
 - 11** Organise, share and communicate information and knowledge in a way that supports effective fundraising planning.

Develop and implement an integrated fundraising plan

Overview

As a fundraising manager you will have responsibility for developing the organisation's overall approach to fundraising, and for agreeing the overall fundraising objectives in consultation with senior managers and/or trustees.

This unit asks you to consider the key sources of funding that may be sought, the case for support and the key segments of funders that will be approached in each case.

For the complete standard please see **F19** in the full set of standards:
www.ukworkforcehub.org.uk/fnos08

We would also recommend you view:

- F2** Assist with fundraising implementation.
- F4** Use your communication skills to support the work of fundraisers.
- F26** Provide leadership in your area of responsibility.

Performance criteria

- To develop an integrated fundraising plan you must:**
- 01** Analyse and interpret fundraising audit data.
 - 02** In the light of this data, consult with senior colleagues and/or trustees to agree on appropriate and realistic fundraising objectives consistent with the requirements of the organisation.
 - 03** Develop and specify fundraising strategies to achieve these objectives that are consistent with organisational requirements and reflect the opportunities and threats highlighted in the audit.
 - 04** Ensure that the level of risk in implementing these strategies is consistent with organisational requirements.
 - 05** Ensure that the strategies adopted are consistent with the positioning, branding, communication strategies and organisational culture of the organisation.
 - 06** Co-ordinate the implementation of the plan with relevant colleagues and other stakeholders to ensure that it does not conflict with the priorities and plans of other sections of the organisation (e.g. campaigning or service provision).
 - 07** Identify the actions that will be required of the organisation to resource and implement the strategy and ensure these actions will be taken by those responsible.
 - 08** Ensure that risk assessments have been conducted and contingency plans are available where feasible.
 - 09** Ensure that systems are in place to monitor the flow of funds and resources, and to highlight factors that affect this.
 - 10** Develop and agree budgets for the achievement of the strategies, setting out clear actions, accountabilities and milestones.
 - 11** Confirm that the relevant fundraising colleagues have all the information and resources necessary to perform their tasks effectively.
 - 12** Ensure that each person involved in implementation understands their role and has had opportunity to discuss any problems.
 - 13** Ensure that the progress of the fundraising activities is monitored and reviewed against agreed targets and that contingency plans are implemented where discrepancies emerge.
 - 14** Assess the impact that the activities of other agencies and external events have upon the plan and where necessary propose and implement appropriate changes to your strategy.
 - 15** Ensure that experience gained during the implementation of the fundraising plan can be used by staff to further personal development and improve organisational practices.

Use information technology (IT) effectively in fundraising

Overview

IT systems and tools underpin the majority of fundraising functions. It is important to be aware of the appropriateness, potential and limitations of each in facilitating effective fundraising activity.

You will need to develop a working knowledge of the IT tools and systems available within your organisation, and an awareness of how these could be augmented or developed to assist in fundraising. You will also need to understand, use and be able to brief others in the use of any supporter/contacts database system that is available to you.

Performance criteria

- ✓ **To use IT tools and systems effectively in fundraising you must:**
 - 01** Ensure that you are aware of the range of IT tools available to the fundraising function within your organisation and that you have received a relevant level of training on each.
 - 02** Ensure that all immediate colleagues have received the appropriate level of IT training to effectively facilitate their work.
 - 03** Accurately identify the type and quality of IT resources you need to meet your agreed fundraising objectives, or that would significantly improve fundraising performance or efficiency.
 - 04** Identify any shortfall between required and allocated IT resources; discuss and recommend changes to the relevant people.
 - 05** Research and benchmark the effective use and development of IT tools within fundraising, and discuss/make recommendations as appropriate.
 - 06** Ensure that you have access to third party suppliers, or any IT specialists or supporting services to overcome any difficulties or potential difficulties in using IT systems and technologies.
- To understand and use supporter/contacts databases effectively in fundraising you must:**
 - 07** Ensure that you are aware of the structure, content, basic functionality, value, potential and limitations of supporter/contacts databases in your organisation.
 - 08** Ensure that all immediate colleagues have received the appropriate level of training on the database/s to effectively facilitate their work.
 - 09** Accurately identify the type and quality of data you need to meet your agreed fundraising objectives, or that would significantly improve fundraising performance or efficiency.
 - 10** Identify any shortfall between required and allocated database functionality, discuss and recommend changes to the relevant people.
 - 11** Research and benchmark the effective use and development of supporter/contacts databases in fundraising, and discuss/make recommendations as appropriate.
 - 12** Be fully conversant with data protection legislation and with the policies and procedures adopted by your organisation in this regard.

For the complete standard please see X2 in the full set of standards:

www.ukworkforcehub.org.uk/fnos08

Lead others in the achievement of fundraising work

Overview

This standard is about providing direction to people to align their efforts. It involves inspiring and motivating teams of employees and/or volunteers towards achieving fundraising objective(s).

To do this you will need to make sure that you understand your own role within the work plan that has been provided for you. You will also need to be able to inform, monitor and support your team about their job roles within the work plan.

You will need to review the work of your team and consider their performance and quality of work and whether it could be improved. You will need to evaluate these issues and communicate with your team, and individuals within it, in a constructive manner. You will contribute to their career development.

Performance criteria

- ✓ **To inform your team about the plans for their work you must:**
 - 01** Ensure that you are clear about your own role within the work plan and the role(s) of your team, seeking clarification from your line manager where necessary.
 - 02** Inform your team of their tasks and responsibilities in a way that promotes good working relationships and clarifies boundaries.
 - 03** Empower team members to develop their own ways of working and take their own decisions within agreed boundaries.
 - 04** Ensure that your team is fully conversant with the methods they will use to carry out fundraising activities.
- To carry out the work with your team you must:**
 - 05** Monitor the work of your team to ensure that members of your team are undertaking their tasks efficiently, effectively and in accordance with the work plan.
 - 06** Provide support and advice to members of your team on how to achieve their objectives.
 - 07** Guide your team successfully through difficulties and challenges, including any conflict within the team.
 - 08** Communicate regularly, making effective use of a range of different communication methods with all the people working within your team and show that you listen to what they say.
 - 09** Motivate people across your team to achieve their work and development activities and provide recognition when they are successful.
 - 10** Ensure your availability to solve any emergent problems, and to ensure a healthy flow of information among all relevant persons.
 - 11** Seek advice and guidance from your line manager or other relevant colleagues if you need help to achieve your team's objectives.
- To review your performance and that of your team you must:**
 - 12** Advise your team that you will be reviewing their performance and carry this out in an objective manner that will not compromise their work.
 - 13** Provide feedback to each individual on:
 - the work of the team as a whole
 - the work of that individual.
 - 14** Consult your team for:
 - Constructive suggestions to improve future performance
 - Opportunities to improve information flow
 - Any foreseeable problems in completing the plan
 - 15** Evaluate your own performance in leading the team and ask your line manager for feedback

For the complete standard please see X3 in the full set of standards:

www.ukworkforcehub.org.uk/fnos08

Manage fundraising resources effectively

Overview

You will be required to monitor, review and oversee an overall budget and the distribution and utilisation of non-financial resources (e.g. material, technological, and human resources).

Where monitoring reveals areas where resources could be allocated more effectively or additional resources are required, it is your responsibility to determine the most appropriate allocation or redistribution of resources, recommend and implement the changes.

You must also ensure that in managing your resources you take proper account of the risks inherent in each activity. This requires an evaluation of all risks, not just financial ones.

For the complete standard please see **F22** in the full set of standards:

www.ukworkforcehub.org.uk/fnos08

We would also recommend you view:

F5 Support the work of your fundraising team.

Performance criteria

To allocate fundraising resources for maximum effect you must:

- 01** Identify the full range of fundraising activities that are planned or are already taking place.
- 02** Identify what resources are required to facilitate those fundraising activities and the budget allocated for them.
- 03** Conduct a risk assessment of the activities, including whether there are any risks for which full health and safety risk assessments or additional insurance cover will be required.
- 04** Compare the scope of resources available to determine whether gaps exist, and whether additional resources may be required to facilitate successful fundraising performance.
- 05** Ensure resources are allocated in accordance with:
 - The skills base within your organisation
 - The time frame that you are operating within
 - Agreed organisational and fundraising priorities
 - Your budget
 - Acceptable levels of risk
- 06** Identify and build in contingencies to cope with necessary changes.
- 07** Consult with and communicate your decisions to those who will implement them.

To monitor the allocation of fundraising resources you must:

- 08** Establish a reasonable and meaningful time and logistical cycle for reviewing fundraising resource allocation.
- 09** Ensure methods, including budget monitoring, are in place to identify poor utilisation of resources.
- 10** Review those methods to ensure feedback is available on resources allocation.

To review and reallocate fundraising resources you must:

- 11** Identify discrepancies between projected and actual fundraising activities.
- 12** Determine those areas where resources might be more effectively re-allocated or where additional resources are required.
- 13** Plan revised resource allocation and present your recommendation to your line manager/other relevant people.
- 14** Ensure that any reallocation of human resource fits with expertise and the personal development plans of individuals.
- 15** Negotiate the re-allocation of resources and discuss the re-allocation of resources with those who will implement your decisions, amending your budget if necessary.

Plan and co-ordinate joint working for fundraising

Overview

This standard is about working effectively with other organisations or functions in your organisation towards realising your fundraising goals. It includes managing the interface with other functions, establishing shared goals and the capabilities, roles, responsibilities, rights and expectations of each function. It includes monitoring performance against mutual expectations and evaluating the effectiveness of the working relationships in achieving shared goals.

For the complete standard please see **F23** in the full set of standards:

www.ukworkforcehub.org.uk/fnos08

We would also recommend you view:

F4 Use your communication skills to support the work of fundraisers.

Performance criteria

To work collaboratively with other functions or organisations you must:

- 01** Identify other functions (or organisations) and key stakeholders within these, and establish their interest and understanding, relevant to achieving your fundraising aims and objectives.
- 02** Recognise and respect the roles, responsibilities, interests and concerns of the stakeholders in other organisations or functions.
- 03** Discuss and consult with stakeholders in relation to key decisions and activities important for promoting a focus on delivering value to supporters, and take account of their views, including their priorities, expectations and attitudes.
- 04** Identify and resolve conflicts of interest and disagreements with stakeholders in ways that minimise damage to work/activities, to the individuals involved and to the organisation.
- 05** Monitor and review the effectiveness of working relationships with stakeholders in other organisations or functions, seeking and providing feedback, in order to identify areas for improvement.
- 06** Create service level agreements as and where appropriate.
- 07** Fulfil agreements made with colleagues and stakeholders and let them know, advising them promptly of any difficulties, or where it will be impossible to fulfil agreements.
- 08** Monitor the effectiveness of the cooperation across business functions in achieving the organisation's fundraising objectives and identify and communicate where this is effective and address any area of concern with those involved.

Receive and process donations

Overview

Fast and accurate processing of donations received is a key element of supporter care, and the creation and maintenance of accurate financial records is an essential administrative function in fundraising.

You will need to be fully conversant with the systems and processes your organisation has in place. Since much of the information will be sensitive in nature you will need to be accurate and maintain confidentiality.

For the complete standard please see **F6** in the full set of standards:
www.ukworkforcehub.org.uk/fnos08

Performance criteria

<input checked="" type="checkbox"/>	To receive and record incoming donations you must:
<input type="checkbox"/>	01 Check and process incoming donations promptly.
<input type="checkbox"/>	02 Enter information accurately from source documents into the correct part of the database.
<input type="checkbox"/>	03 Record Gift Aid declarations where appropriate.
<input type="checkbox"/>	04 Record data protection preferences where appropriate.
<input type="checkbox"/>	05 Issue an appropriate acknowledgement/thank you if required.
<input type="checkbox"/>	06 Follow all the organisation's procedures for handling donations and for modifying or deleting existing data.
<input type="checkbox"/>	07 File source documents according to your organisation's procedures.
<input type="checkbox"/>	08 Maintain security and confidentiality at all times.
<input type="checkbox"/>	09 Notify the relevant person if you encounter any difficulties or discrepancies.
<input type="checkbox"/>	10 Comply with legal requirements and fundraising codes of practice.
<input type="checkbox"/>	11 Seek advice and feedback on your performance so you can make any necessary changes in your approach.

Manage data to support fundraising

Overview

In this standard you will need to show that you can use information technology to search for and select fundraising information as required by the relevant person(s). You will need to show that you can think creatively to locate sources of potentially useful information. This could include, for example, maintaining contact with appropriate e-mail newsletters, briefings, blogs and networks to ensure that you keep yourself up-to-date on fundraising.

You will also need to show that you can present data in the agreed format using information technology. This unit is also about inputting information onto a database and maintaining that information.

For the complete standard please see **F7** 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 Confirm with the relevant person(s) what type of fundraising information to search for and when it is required.
<input type="checkbox"/>	02 Search suitable sources of fundraising information.
<input type="checkbox"/>	03 Select the information suitable for your immediate purpose and save other material in a relevant file for future reference.
<input type="checkbox"/>	04 Check with additional sources of information to ensure that the knowledge that you have obtained is accurate and up-to-date.
<input type="checkbox"/>	05 Combine pieces of information into a single document using appropriate importation techniques.
<input type="checkbox"/>	06 Use presentation techniques to emphasise to users the most important points.
<input type="checkbox"/>	07 Ensure that the contents and presentation of your document are approved by the relevant person(s).
	To search for information you must:
<input type="checkbox"/>	08 Input information into a database as required by the relevant person(s).
<input type="checkbox"/>	09 Ensure that such information is input using a format which meets the needs of the relevant person(s) and the requirements of the database.
<input type="checkbox"/>	10 Ensure you can export the data in the required format and by the required time.
<input type="checkbox"/>	11 Maintain a regular check on the information within the database to ensure its currency and accuracy.
<input type="checkbox"/>	12 Check with the relevant person(s) to confirm: <ul style="list-style-type: none">• That the work you are doing will adhere to data protection requirements.• Those users with permission to access the database.

Monitor, enhance and sustain relationships with supporters of your cause

Overview

One of the most important aspects of fundraising is the development of a generous and loyal supporter base.

A critical part of your role will be taking action to preserve the loyalty of your supporters, to increase their satisfaction and their value to the organisation over time. In the context of giving you might achieve this, for example, by increasing the value of their gifts, the frequency of their giving, or encouraging them to upgrade from occasional to regular giving. You will also want to consider soliciting legacy or major gifts from appropriate individuals. In the context of volunteering you might achieve this by planning to engage them in a range of activities reflecting their individual motives and goals.

For the complete standard please see **F17** in the full set of standards:

www.ukworkforcehub.org.uk/fnos08

We would also recommend you view:

F3 Contribute to the maintenance of relationships with supporters

F20 Manage supporter retention

F25 Develop a customer focused organisation

Performance criteria

<input checked="" type="checkbox"/>	To monitor the development of your organisation's existing supporters you must:
<input type="checkbox"/>	01 Identify the information that needs to be gathered and held in order to inform the development of supporter strategies.
<input type="checkbox"/>	02 Ensure systems are in place to bring in and hold such information and that they are reviewed regularly for areas to improve.
<input type="checkbox"/>	03 Ensure that the maintenance of supporter records takes place in accordance with legislation, regulations, codes of practice and organisational requirements.
<input type="checkbox"/>	04 Confirm that the supporter records are kept current, accessible and usable.
<input type="checkbox"/>	05 Confirm that data protection preferences are recorded as appropriate.
<input type="checkbox"/>	06 Monitor and analyse sources of information to identify trends in the types and levels of support received.
<input type="checkbox"/>	07 Use this information to assess who presently supports the work of your organisation and reasons for this.
<input type="checkbox"/>	08 Evaluate the methods used to maintain existing support and identify whether new methods need to be implemented.
<input type="checkbox"/>	09 Ensure that your chosen method(s) of communication promotes continued good relations and commitment from existing supporters.
	To maintain and develop support you must:
<input type="checkbox"/>	10 Provide an opportunity to gather further support.
<input type="checkbox"/>	11 Maintain the enthusiasm of the supporter for the organisation and project.
<input type="checkbox"/>	12 Provide an opportunity for supporters to have a say on how often and how your organisation communicates with them.
<input type="checkbox"/>	13 Provide opportunities for supporters to upgrade their giving.
<input type="checkbox"/>	14 Develop a plan to develop the value of each segment of supporter.
<input type="checkbox"/>	15 Solicit and review feedback regularly for areas to improve supporter satisfaction.
<input type="checkbox"/>	16 Conduct regular exit polling of each key category of supporter to establish the reasons for the termination of their support.

Assist with fundraising reporting

Overview

This standard is about measuring and reporting on the results of a fundraising activity. This could concern a specific fundraising project or cover fundraising activities more generally. It might also include providing feedback to external funders.

You will need to research and collate financial and other data, and calculate simple ratios with the aid of spreadsheet or database packages. You will need to present the resulting information in the format agreed with the relevant person(s).

You will need to clarify your own tasks and identify the deadlines that you will need to work to with the relevant person(s).

For the complete standard please see **F8** 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 your tasks and responsibilities with the person(s) you are supporting and the time available for you to complete your tasks.
<input type="checkbox"/>	02 Ensure that you plan and prioritise your workload in consultation with relevant persons.
<input type="checkbox"/>	03 Understand the aim of the reporting process and how your tasks fit into the process as a whole.
<input type="checkbox"/>	04 Use the procedures and tools provided to facilitate fundraising reporting in your organisation.
<input type="checkbox"/>	05 Enter fundraising data accurately from source documents.
<input type="checkbox"/>	06 Maintain security and confidentiality at all times.
<input type="checkbox"/>	07 Ensure that you provide reports of your progress at the times agreed and in the format required by the relevant person(s).
<input type="checkbox"/>	08 Notify the relevant person(s) if you encounter any difficulties or discrepancies in a timely fashion.
<input type="checkbox"/>	09 Agree any variations to your tasks with the relevant person(s).
<input type="checkbox"/>	10 Comply with legal requirements and fundraising codes of practice.

Lead the monitoring and evaluation of fundraising performance

Overview

Monitoring and evaluation of delivery is crucial to the success of fundraising activity.

External circumstances may change between the preparation of a fundraising audit, the co-ordination of the various plans involved in the strategy, and between the initial launch and ongoing delivery of the strategy/tactics.

To be able to cope with such changes you must be prepared to review and revise your approach, noting any opportunities the monitoring highlights for performance enhancement or the introduction of more suitable/additional strategies, and taking action to improve the effectiveness of the fundraising effort where the monitoring highlights weaknesses or failure to meet the planned targets.

Monitoring the delivery of the fundraising strategy means that both successful and unsuccessful strategies can be meaningfully reviewed. The successful aspects of any strategy can be recorded and refined for future reference, while unsuccessful aspects will require intervention to improve performance, limit damage or find creative solutions to the problems encountered.

For the complete standard please see **F21** in the full set of standards:

www.ukworkforcehub.org.uk/fnos08

Performance criteria

<input checked="" type="checkbox"/>	To monitor the development of your organisation's existing supporters you must:
<input type="checkbox"/>	01 Work with your line manager and other relevant colleagues/stakeholders to determine performance indicators and measures against which the fundraising strategy/tactics can be assessed.
<input type="checkbox"/>	02 Monitor and evaluate the impact of internal and external factors on the performance of the organisation's fundraising strategy.
<input type="checkbox"/>	03 Identify relevant details, including timescales, expenditures and income targets and the content of plans devised to achieve them.
<input type="checkbox"/>	04 Consult with those involved in the implementation of the strategies for information and feedback.
<input type="checkbox"/>	05 Monitor and evaluate performance against the indicators and measures agreed.
<input type="checkbox"/>	06 Work with your line manager and colleagues to ensure that the delivery of the strategy is in line with the organisation's wider aims and objectives.
	To maintain and develop support you must:
<input type="checkbox"/>	07 Establish which aspects are performing according to the strategy and which aspects may benefit from amendment.
<input type="checkbox"/>	08 Identify any amendments to the strategy required as a consequence of changes to the wider organisation's aims and objectives.
<input type="checkbox"/>	09 Record those aspects where amendment was required for future note.
<input type="checkbox"/>	10 Ensure communications channels are open and constructive for feedback on the success and failure of the individual and overall plans.
<input type="checkbox"/>	11 Agree with members of your team areas for revision based on their feedback and evidence.
<input type="checkbox"/>	12 Revise the measures and review dates, where appropriate.
<input type="checkbox"/>	13 Record the modifications accurately.
<input type="checkbox"/>	14 Inform all those involved in the implementation of the modified strategy as appropriate.
<input type="checkbox"/>	15 Use indicators and measures to inform future fundraising activity.
<input type="checkbox"/>	16 Promote the evaluation of fundraising activities and its importance to the organisation.

Represent fundraising to the Board

Overview

This standard is about demonstrating the importance of fundraising to the Board of a non-profit and ensuring that trustees/directors understand how fundraising works. It is also about ensuring that these individuals understand the role that they might play in enhancing the performance of the fundraising function and particularly in assisting with appropriate forms of fundraising, such as major gift.

For the complete standard please see **F27** 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 Communicate the importance of effective fundraising in achieving an organisation's aims.
<input type="checkbox"/>	02 Communicate the nature and importance of a Board's role in achieving fundraising objectives.
<input type="checkbox"/>	03 Communicate the importance of transparency and accountability in the public reporting of fundraising results.
<input type="checkbox"/>	04 Provide reports and summary statistics, including relevant metrics, on the performance of the organisation's fundraising function.
<input type="checkbox"/>	05 Identify and communicate the key drivers of fundraising performance in your organisation.
<input type="checkbox"/>	06 Explain and justify the pattern of performance achieved, highlighting weaknesses in performance as appropriate.
<input type="checkbox"/>	07 Respond appropriately to requests from the Board for additional information or clarification, dealing effectively with any misconceptions or misunderstandings about the operation of the fundraising function.
<input type="checkbox"/>	08 Demonstrate the importance of supporter retention and the rationale for investing in this area.
<input type="checkbox"/>	09 Demonstrate how fundraising strategies and plans help to develop and maintain positive relationships with supporters and the resultant benefits in terms of loyalty and donor lifetime value.
<input type="checkbox"/>	10 Demonstrate how an effective fundraising strategy allows an organisation to make efficient use of its resources by focusing upon the target audiences and supporters most responsive to its solicitations.
<input type="checkbox"/>	11 Demonstrate how new fundraising products/services allow the organisation to satisfy changing supporter needs and how this generates return on investment.
<input type="checkbox"/>	12 Report on the environmental impact of the organisation's fundraising activities and suggest changes in policy, as appropriate.
<input type="checkbox"/>	13 Work with the Board as appropriate to develop an ethical policy to guide the organisation's fundraising practice.



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