ASSOCIATION OF FUNDRAISING PROFESSIONALS

Knowledge Areas and Curriculum Framework

Acknowledgments

AFP would like to recognize and thank those involved in planning and conducting the Practice Analysis and developing the AFP Curriculum Framework.

Practice Analysis Task Force

James M. Greenfield, ACFRE, FAHP, Chair
Tim J. Burchill, CFRE
Barbara L. Ciconte, CFRE
Glen W. Cosper, CFRE, MA
Robert E. Fogal, Ph.D., ACFRE
Patricia Hardy, ACFRE
Stephen M. Levy, CFRE
Eugene Scanlan, Ph.D., CFRE
Lilya Wagner, Ed.D., CFRE

Professional Examination Service:
Sandra Greenberg, Ph.D.
Patricia M. Muenzen, MA

AFP Staff:
Richard Chobot, Ph.D., CAE
Cathlene Williams, Ph.D., CAE

Curriculum Development Task Force, 2002–2003

Glen Cosper, CFRE, MA, 2002 Chair
Susan Storey, CFRE, 2003 Chair
Nancy R. Barkman, CFRE
Brian J. Bonde, CFRE
Mary Anne Chern, ACFRE, FAHP
Bobby Cobbs, CFRE
Janene M. Connelly, CFRE
Ann M. Hale, CFRE
Charlotte Rhodes, ACFRE
Eugene Scanlan, Ph.D., CFRE
David C. Wolfsen, CFRE
Peter J. Wyro

AFP Staff:
Richard Chobot, Ph.D., CAE
Cathlene Williams, Ph.D., CAE

Curriculum Development Task Force, 2004

Susan Storey, CFRE, Chair
Julie Alfred, CFRE
Jeannette J. Archer-Simons
Gerry Backs, MA, CFRE
Nancy R. Barkman, CFRE
Brian J. Bonde, CFRE
Anita K Brower CFRE
Bobby Cobbs, CFRE
Timothy S. Coffey, CFRE
Janene M. Connelly, CFRE
Glen Cosper, CFRE, MA
Patricia A. Hall
Angela C. Kemper, CFRE
Gary W. Key
Kathryn B. Knox, ACFRE
Melissa Sharp Leasia, CFRE
Jonathan A. Lindsey, CFRE
Timothy D. Logan, ACFRE
Diane B. Ludwig, CFRE
Alexander S. Macnab, FAHP, CFRE
Donna H. Melton, CFRE
Carol J. Numrich, CFRE
Joseph Porter
Jill A. Pranger, CFRE
Charlotte Rhodes, ACFRE
Eugene Scanlan, Ph.D., CFRE
David C. Wolfsen, CFRE
Peter J. Wyro

Curriculum Advisor:
Joyce A. Kozuch, Ph.D.

AFP Staff:
Walter Sczudlo, JD
Cathlene Williams, Ph.D., CAE

Dear Friends and Colleagues,

With the assistance of the Professional Examination Service (PES) of New York, a Practice Analysis Task Force completed AFP's two-year Fundraising Practice Analysis Study in 2002. The goal of the Practice Analysis Study was to develop a framework, or set of models, that "map" the skills, knowledge and competencies required of professional fundraisers in order to perform their job responsibilities at various levels (entry-level, mid-level, and advanced) and areas of practice. The resulting models would then serve as a credible, comprehensive framework on which to ground programs for the self-assessment, training, continuing education and certification of professional fundraisers throughout their careers.

Glen Cosper, CFRE

Using outcomes from the Practice Analysis, the AFP Curriculum Development Task Force began work on a Fundraising Curriculum Framework in 2002. The Curriculum Framework categorized for the three levels of practice (entry-level, mid-level and advanced) the knowledge and skills to be addressed by fundraising training and education activities of all kinds. It was for the fundraising profession the first instrument of its kind, allowing trainers, publishers, employers, and practitioners to develop and select educational opportunities most appropriate to specific audiences.

Susan Storey, CFRE

In 2008 the AFP Higher Education Task Force recommended adding the competencies and knowledge areas identified in the Practice Analysis to the Curriculum Framework document and renaming it *Knowledge Areas and Curriculum Framework*. The competencies and knowledge areas are incorporated in this new version of the document as Part I, and the Curriculum Framework is designated as Part II.

For AFP and its 190+ chapters, this is a powerful new tool for ensuring the relevance of educational programs such as the International Conference on Fundraising and local chapter offerings. This document is also made available to publishers, academic programs and other providers to benefit the entire profession. We hope you will share it with colleagues and use it in your teaching.

The AFP Knowledge Areas and Curriculum Framework and the AFP Career Planner, an online assessment and resource tool, are works in progress. Staff and volunteers will continually update the materials with new learning activities and resources to respond to ongoing advancements in the field. We welcome your comments and suggestions for additions to the materials.

Glen Cosper, CFRE
Vice Chair, AFP Professional Advancement

Susan Storey, CFRE
Chair, Curriculum Task Force

How to Use the Knowledge Areas and Curriculum Framework

The AFP Knowledge Areas and Fundraising Curriculum Framework is intended to provide a structure for the study of fundraising. It can be used in a variety of ways:

- To communicate learning objectives to students
- To provide instructors with ideas for developing learning activities for students
- To provide a basis for developing benchmarks to determine students' mastery of the subject matter

To use this document in designing a particular course, e.g., major gifts fundraising or planned giving, select the roles and responsibilities that relate to the course's theme, then review and select the learning objectives and suggested learning activities that are most relevant for your subject matter.

For ideas on developing educational experiences for fundraising professionals, go to the AFP website, *www.afpnet.org*. Under the heading Education and Career Development is an area called Resources for Educators, which contains many helpful suggestions.

We encourage those who are AFP members to use the Knowledge Areas and Curriculum Framework in conjunction with the AFP Career Planner tool, which is available through the AFP website's Member Gateway. The Career Planner is three tools in one:

1. It is a database which contains fundraising educational offerings, both online and classroom, across the U.S. and Canada; more than 1,500 books, articles (many of them full text), AFP Audioconferences and audiotapes. These resources are searchable by location, key word, type of media, provider and the learning objectives contained in the Curriculum Framework. Instructors can use it for ideas on course topics and references for specific subjects.
2. It contains a self-assessment test individuals can use to identify areas in which they need to improve professional skills and knowledge. Once specific knowledge areas are identified, individuals can use the software to identify one or more learning resources, including books, articles, audiovisual materials, courses and degree programs to help them achieve their objectives.
3. It includes a Personal Planner and a Record of Accomplishment. The Personal Planner allows users to construct a long-range career plan and identify specific objectives, action steps and timelines for reaching their goals. The Record of Accomplishment allows users to record the completion of educational activities and other steps in their personalized career plans.

If you would like to share examples of ways you've used the AFP Knowledge Areas and Curriculum Framework in your teaching, please contact the Professional Advancement Division, at the AFP offices in Arlington, Va.

Table of Contents

Part I: Competencies and Knowledge Areas of Fundraisers

Competencies of Fundraisers

Competency Area 1: Relationship Building Engaging and interacting with others to achieve organizational goals and fulfill interpersonal commitments.

CONSENSUS BUILDING

- Maintains professional demeanor with colleagues and constituents while performing daily tasks
- Interacts effectively with others to accomplish goals and objectives
- Leads others in achieving consensus and affirmation of common goals and objectives

INTERACTIONS

- Acts in a manner appropriate to situations and peoples' similarities and differences
- Understands and practices building productive relationships with volunteers, donors, and colleagues
- Develops and maintains productive relationships with a wide range of people in diverse situations

ENGAGEMENT

- Develops personal engagement with the organization's mission
- Articulates the organization's mission in ways that respond to the needs of donors and volunteers
- Engages volunteers, donors, and colleagues in building their commitment to the organization's mission and vision

SELF-AWARENESS

- Begins to recognize how one's own beliefs and preferences have an impact on relationships
- Respects and demonstrates openness to a range of beliefs and preferences
- Mentors colleagues and volunteers to interact productively with people of diverse beliefs and preferences

ACTIVE LISTENING

- Identifies and accepts needs, opinions, and feelings expressed by donors and prospects
- Discerns and responds professionally to the underlying feelings and beliefs of donors and prospects
- Analyzes and interprets what is needed to bring about a long and productive relationship between donors/prospects and the organization

OUTCOMES

- Obtains information about donors and volunteers pertinent to fundraising objectives
- Obtains gifts and recruits volunteers for purposes that are meaningful to those involved
- Engages donors and volunteers in ways that sustain productive, long-term giving and leadership

COMMUNICATION

- Demonstrates competence in oral and written communication
- Articulates the case in an effective and persuasive manner
- Creates and shapes multiple methods of communication to engage a diverse audience

PERSONAL STYLES

- Perceives personal styles of colleagues and volunteers, recognizing and respecting differences
- Translates perceptions of colleagues' and volunteers' personal styles into productive interactions
- Strategically manages diverse personal styles to energize volunteers and colleagues for organizational achievement

TEAMWORK

- Interacts with individuals and groups to achieve common objectives
- Defines directions and leads people toward common objectives
- Integrates individuals and groups into collaborative efforts to accomplish institutional goals

Competency Area 2: Leadership Developing, directing, and evaluating human and financial resources to accomplish departmental and organizational objectives.

ETHICS

- Understands and applies ethical standards and practices
- Practices ethical judgment in the context of complex situations
- Mentors subordinates, colleagues, and volunteers in understanding and applying a code of ethics and standards of practice

TEAM BUILDING

- Participates actively and contributes to teams
- Builds and motivates high-performance teams of staff and volunteers
- Provides vision, inspiration, and creative empowerment to staff, constituents, and board members

MOTIVATION

- Maintains or exceeds levels of work required to meet goals
- Practices going beyond immediate responsibilities to exceed goals
- Motivates others to exceed goals while carrying own organization-wide responsibilities

DONOR RELATIONS

- Engages donors and prospects with the organization
- Facilitates increased involvement and giving by donors
- Motivates and secures transformational leadership gifts

PHILANTHROPIC CONTEXT

- Develops an understanding and appreciation of philanthropy
- Integrates philanthropy into the culture of the organization
- Interprets philanthropy to diverse social and cultural audiences

SHARED LEADERSHIP

- Solicits participation from individuals in a way that fosters ownership and success
- Creates an environment for staff and volunteers to share ownership and success
- Empowers stakeholders to sustain and enhance the organization's vision

PLANNING

- Plans ahead to ensure that necessary tasks and deadlines are achieved
- Thinks strategically to achieve long-term goals and objectives
- Defines and sets in motion strategies to shape the future

GOALS SETTING

- Understands organizational goals and objectives and distills them into assigned tasks
- Translates organizational goals and objectives into effective fundraising activities
- Participates in setting organizational goals and objectives and integrates them into fundraising strategies

PROFESSIONAL AFFILIATIONS

- Joins a professional association and subscribes to code of ethics
- Participates in professional association committees and/or boards
- Provides voluntary leadership at local, regional, and national levels; speaks and writes for the profession

CREDENTIALING

- Participates in professional development training and education, and tracks participation for future certification
- Achieves baseline certification and develops managerial skill through continuing education and/or advanced degree study
- Achieves advanced certification and/or specialty certificates

VOLUNTEER MANAGEMENT

- Identifies prospective volunteers and assists with volunteer activities
- Provides staff support for program committees and recruits and trains volunteers
- Provides staff support for board of directors, and sustains long-term partnerships with multiple volunteers

Competency Area 3: Professional Judgment Involving and inspiring others to realize philanthropic and organizational vision.

CONTEXT

- Understands size and scope of non-profit sector and the organization's role in the community
- Studies philanthropy and the non-profit sector, and understands trends and issues and their impact on fundraising
- Influences fundraising practice through an understanding of the profession's and the non-profit sector's development

DATA COLLECTION AND ANALYSIS

- Collects and/or analyzes data that can be used to evaluate fundraising results
- Determines what data are needed, the manner in which data are recorded and tracked, and the types of analytical reports necessary to evaluate fundraising results

- Uses analysis of fundraising results to clarify short- and long-term objectives for an overall development program and to measure progress toward goals

SCOPE OF FUNDRAISING OPERATIONS

- Performs fundraising tasks and/or projects with appropriate supervision
- Designs, implements, and evaluates fundraising programs for annual, capital, and/or endowment support with minimal supervision
- Defines, directs, and evaluates overall fundraising strategies to meet current and future organizational goals

PROBLEM SOLVING

- Notifies and informs others when a problem is encountered
- Recognizes problems; recommends and/or implements possible solutions
- Assesses situations, anticipates problems, and implements creative solutions with others

PROFESSIONAL GROWTH

- Participates in fundraising and philanthropic education/training programs
- Attends increasingly advanced levels of education and training and is prepared to mentor or speak at educational workshops
- Provides leadership, mentoring, and training to professionals and volunteers, including research, teaching, public speaking, and/or writing

Competency Area 4: Organizational Management Practicing thoughts and behaviors that lead to efficient and effective performance.

ORGANIZATIONAL FINANCES

- Learns to interpret budget documents
- Develops and manages budgets for one or more fundraising programs; interprets financial statements
- Develops and manages budget processes for a department or group of departments

WORK SYSTEMS, INCLUDING TIME MANAGEMENT

- Organizes own workload and schedule to meet assigned goals
- Implements and monitors systems to optimize individual and workgroup efficiency and effectiveness
- Develops and evaluates systems to optimize individual, workgroup, and organizational efficiency and effectiveness

INFORMATION MANAGEMENT

- Gathers and distributes information that is pertinent to specific projects or tasks
- Analyzes and evaluates information according to predetermined criteria
- Designs and develops criteria for data collection, analysis, and dissemination

MULTI-TASKING

- Accepts and carries out multiple assignments effectively
- Prioritizes multiple tasks and completes them to achieve broader objectives
- Designs and initiates multiple assignments and ensures completion in accordance with organizational needs

STRATEGIC PLANNING

- Understands and performs in accordance with departmental strategic planning
- Helps shape strategic direction at the departmental level
- Participates in shaping strategic direction at the organizational level

HR MANAGEMENT

- Understands how one's performance contributes to the functioning of the department, and acts on suggestions for growth
- Conducts performance reviews in accordance with established criteria, and suggests constructive individual and operational improvements
- Establishes evaluative criteria for fundraising professionals and programs

Knowledge Areas of Fundraisers

Nature and purposes of vision and mission statement
Institutional history and philosophy
Interpersonal group dynamics
Functions and relationships among constituents
Organizational behavior
Organizational assessment
Strategic planning
Non-profit law and legal environment
Institutional advancement process
Operational planning process
Fundraising strategies and tactics
Financial management
Management of volunteers
Principles of financial planning
Reporting techniques
Performance appraisal
History and philosophy of philanthropy
Codes of ethics
Interrelations with other professionals
Psychosocial aspects of giving
Current and future trends in fundraising
One's business/organizational goals
Types of gifts
Gift cultivation and solicitation
Major gifts
Planned gifts
Direct mail
Annual giving
Endowment building
Management of endowment
Capital campaigns
Special events coordination/event planning
'One-on-one' fundraising initiatives
Public policy and regulation
Organization's business culture
Internal and external environment
Donor intention
Database systems
Outcome measurement techniques

Donor follow-up procedures
Budgeting
Financial reports and balance sheets
Corporate world
Business ethics
Grant proposal writing
Marketing and market research practices
Segmented donor databases
Donor giving patterns
Donor and prospect research techniques
'Damage control' initiatives
Principles and practices of leadership
Principles and practices of negotiation
Use of the telephone and telemarketing in fundraising
Use of the Internet in fundraising
Volunteer-led personal fundraising
Corporate giving
Different cultures and roles of diversity and inclusiveness
Communication vehicles
Motivations for giving
Non-profit governance
Grant making
Grant management, including foundation giving
Government grants and contracts
Human resource management
Organizational development
Program assessment
Media relations
Technology
Presentation techniques
Adult learning theory
Training/teaching techniques
Use of consultants
Principles and practices of consulting
Meeting management
Time-and-task management techniques
Interview techniques and practices
Focus group techniques and practices

Part II: Curriculum Framework

Role 1 Fundraising: The raising of assets and resources from various sources for the support of an organization.

Subrole 1.1 Prospect Identification

The process of collecting data in an organized manner on individuals, corporations, foundations, organizations, and government agencies that might become donors to an organization.

1.1.1 Establish criteria for review and maintenance of prospect information.

1.1.1 Given the description of a particular organization and its circumstances, the learner will be able to design a set of criteria for the collection, use and management of donor and prospect information that is relevant, current and accurate.

ENABLING OBJECTIVES:

- Identify possible information sources that can be used for prospect identification for a particular organization.
- Define ways to measure and rank the value of possible information sources that can be used for prospect identification.
- Develop principles for decision-making on the inclusion and exclusion of prospect information in keeping with the Donor Bill of Rights, the AFP Code of Ethics, and other legal and ethical practices.
- Define methods for evaluating the content and accuracy of prospect information.
- Define standards for measuring and evaluating the security, maintenance, access to, and updating of prospect information.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - legal and ethical considerations for prospect identification.
  - information sources for prospect identification.
  - ways to measure and rank prospect identification sources.
  - principles for including or excluding specific prospect information.
  - methods for evaluating the relevance, currency, and accuracy of prospect information.
  - standards for access to prospect information, its security, maintenance, and updating.
- Given the description of a particular organization and its circumstances, including a profile of its constituents, one or more learners will—
  - Develop a comprehensive and ranked list of appropriate prospect sources for the organization.
  - Decide what information should be collected on prospects and what information should be excluded.

- Justify the decisions on legal and ethical grounds.
- Describe ways to evaluate the relevance, currency, and accuracy of prospect information for the organization.
- Describe the standards to establish for access to prospect information for the organization, its security, maintenance, and updating.

LEVEL OF PRACTICE

Entry Level (1-5 years)

1.1.2 Review internal paper and electronic files, including donors and others, to identify prospects meeting established criteria.

1.1.2. Given the description of a particular organization and its circumstances, and a set of prospect information sources, the learner will be able to:

- Establish criteria for the identification of donors/donor prospects.
- Develop a baseline donor profile.

ENABLING OBJECTIVES:

- Describe the key principles of the Donor Bill of Rights and the AFP Code of Ethics that apply to the composition of a donor profile.
- Evaluate various internal sources of prospect information for the organization.
- Based upon the organization's particular needs and resources, define a baseline for inclusion or exclusion of donors and prospects.
- Based upon the organization's particular needs and resources, define a method for prioritizing donors and prospects.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - key principles of the Donor Bill of Rights and the AFP Code of Ethics that apply to creating a donor profile.
  - how to evaluate internal paper and electronic sources of prospect information.
  - how to establish a baseline for including or excluding donors and prospects.
  - how to prioritize donors and prospects.
- Given the description of a particular organization and its circum- stances, and a set of prospect information sources for it, one or more learners will—
  - Describe how relevant principles of the Donor Bill of Rights and the AFP Code of Ethics will apply to developing a baseline donor profile for the organization.
  - Evaluate the organization's internal paper and electronic sources of prospect information.

- Identify criteria for the baseline donor profile to include and exclude donors and prospects for the organization, based on its particular needs and resources.
- Identify criteria for prioritizing donors and prospects for the organization, based on its particular needs and resources.

LEVEL OF PRACTICE

Entry Level (1-5 years)

1.1.3 Analyze information and screen potential donors, given the established criteria.

1.1.3 Given a list of prospect sources from a variety of print and electronic research methods and materials, and a list of criteria that describes prospects for a particular organization or campaign, the learner will be able to identify individuals who meet these criteria.

ENABLING OBJECTIVES:

- Describe the key principles of the Donor Bill of Rights and the AFP Code of Ethics that apply to screening potential donors.
- Review prospect donor lists and select a preliminary list of prospects based upon the established criteria.
- Rank prospects in order of importance for the organization and its needs.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - ethical considerations when screening potential donors.
  - how to select a preliminary list of prospects based on established organizational criteria.
  - how to rank prospects in order of importance for the organization and its needs.
- Given a list of prospect sources from a variety of print and electronic research methods and materials, and a list of criteria that describes prospects for a particular organization or campaign, one or more learners will—
  - Describe the ethical considerations that apply to screening potential donors in this particular situation.
  - Select a preliminary list of prospects based on the organization's criteria.
  - Rank the prospects in order of importance for the organization and its needs.
  - Explain their ranking decisions.

LEVEL OF PRACTICE

Entry Level (1-5 years)

1.1.4 Create profiles for potential donors, individual and institutional, according to established criteria.

1.1.4 Given an article on a prospect that provides clues to the individual's circumstances, the learner will develop a donor profile and identify any missing sources of information required to complete it.

ENABLING OBJECTIVES:

- Describe the key principles of the Donor Bill of Rights and the AFP Code of Ethics that apply to creating a profile for a potential donor (individual or institutional).
- Highlight personal and professional information in an article on a prospect that is relevant and suitable to include in a donor profile.
- Identify the missing elements in the information provided.
- Give examples of other possible sources that could be integral to the development of a comprehensive donor profile.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - ethical considerations when creating a profile for a potential donor (individual or institutional).
  - information to collect on individual and institutional prospects.
  - sources of information that can be used to create a donor profile.
  - how to identify relevant and suitable information about a prospect to include in the prospect's profile.
- Given a series of articles about a potential donor (individual or institutional), one or more learners will—
  - Describe the ethical considerations that apply to creating a donor profile for the prospect.
  - Review a series of articles about the potential donor and identify which one(s) would be appropriate to use to create the prospect's profile.
  - Explain the choice of article(s).
  - Highlight information for the prospect's profile in the selected article(s).
  - Identify any missing information for the prospect's profile.
  - Brainstorm sources that could provide the missing information for the prospect.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.1.5 Engage the organization's staff, board and volunteers in developing a comprehensive case for support.

1.1.5.1 Given detailed information on a particular organization and its circumstances, the learner will be able to describe ways to engage the organization's staff, board and volunteers in developing a case for support for the organization.

ENABLING OBJECTIVES:

- Describe the value of having a case for support for an organization.
- Describe the ways that a case for support can be used within an organization.
- Describe the ways that a case for support can be used externally.
- Identify information that is essential to the development of a case for support for the organization.
- Explain the relevance of the organization's strategic plan and case statement to the development of a case for support of the organization.
- Explain the importance of involving the organization staff, board members, and volunteers in the development of a case for support of the organization.
- Describe the characteristics of staff, board members and volunteers that would be beneficial in developing a case for support for the organization.
- Describe ways to involve the organization staff in the development of the case for support.
- Give examples of how a board may assist in the development of a case for support for the organization.
- Give a general description of the role of volunteers in developing a case for support of the organization.
- Contrast the merits of one author versus multiple authors in writing the case for support.

1.1.5.2 Given detailed information on a particular organization and its circumstances, the learner will be able to develop a comprehensive case for support.

ENABLING OBJECTIVES:

- Identify key factors within the organizational description that form the basis for the case.
- Identify missing information that is needed for the case.
- Develop a case statement for an organization.
- Develop a comprehensive case for support for an organization.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - definition of a case statement and a case for support.
  - benefits of having a case for support for an organization.
  - ways a case for support can be used internally by an organization.
  - ways a case for support can be used external to the organization.
  - information needed to develop a case for support of an organization.
  - relation of an organization's strategic plan and case statement to its case for support.
  - benefits of involving an organization's staff, board members, and volunteers in developing a case for support.
  - characteristics of staff, board members, and volunteers who can make effective contributions to a case for support.
  - ways to involve each of the following in the development of a case for support for the organization—
    - staff.
    - board members.
    - volunteers.
  - pros and cons of using one author or multiple authors to write a case for support.
- One or more learners will read through a sample case for support and highlight the key points.
- One or more learners will—
  - Review a sample case for support.
  - Identify three positive elements.
  - Identify three potential areas for improvement.
- Given an organization that has never developed a formalized case for support and a leadership that wants to know what it is, why it is important, and why they all need to put aside time to be involved in its development, one or more learners will prepare and present their argument.
- Given detailed information on a particular organization and its circumstances, one or more learners will—
  - Identify key factors within the organizational description that form the basis for its case for support.
  - Identify any missing information that is needed for the case.
  - Describe what staff members, board members, and volunteers to involve in the development of the organization's case for support, why, and how.
  - Develop a case statement for the organization.

- Develop a comprehensive case for support for the organization.
- Describe ways to use the case for support both internally and externally.

- Given a case for support for an organization and only three minutes to summarize it in a presentation to an external group, one or more learners will—
  - Role-play summarizing the case for support as the lead fundraiser for the organization.
  - Evaluate the presentation, focusing on what was effective and what could be improved.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.1.6 Evaluate and rate potential donors.

1.1.6 Given a comprehensive profile for a single possible donor of any type (corporation, foundation, or individual/family) and case for support for a particular organization, the learner will be able to make a recommendation on the suitability of this donor as a major gift prospect.

ENABLING OBJECTIVES:

- Define the characteristics in the donor profile that are relevant to determining suitability as a major gift prospect.
- Determine the suitability of the prospect for a major gift.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - criteria for major gift prospects of various types (corporate, foundation, individual/family).
  - how to use the Linkage, Ability and Interest (LIA) scale to determine the suitability of an individual or family prospect for a major gift (See example of the LIA scale in Appendix A.).
  - how to adapt the LIA scale to organizations of different sizes.
- Given a comprehensive profile for a single possible donor of any type (corporation, foundation, or individual/family) and case for support for a particular organization, one or more learners will—
  - Identify the characteristics in the possible donor's profile that are relevant to determining suitability as a major gift prospect.
  - Determine the suitability of the prospect for a major gift.
  - Explain the decisions about the prospect's suitability for a major gift.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.1.7 Segment the pool of potential donors, using variables such as previous gift level and potential, interest areas and relationship to the organization, as well as organizational needs.

1.1.7 Given a description of a particular organization and its circumstances, its case for support, and its donor profiles, the learner will segment the donors using variables such as gift level and potential, interest areas and relationship to the organization, as well as organizational needs.

ENABLING OBJECTIVES:

- Explain the importance of the prospect's previous gift level, potential, interest areas, and relationship to the organization, and organizational needs in the segmentation process.
- Create a gift-range table based on the donor profiles and the organizational needs, and identify trends, overlap of interest areas, and relationship to the organization.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - criteria to use in segmenting a pool of potential donors and why.
  - how to segment a pool of potential donors.
  - how to create a gift-range table based on donor profiles and organizational needs, and enter potential donors.
  - how to interpret a gift-range table, including identifying trends, overlap of interest areas, and relationship to the organization.
- Given a description of a particular organization and its circumstances, its case for support, and its donor profiles, one or more learners will—
  - Explain what criteria to use to segment the pool of potential donors and why.
  - Segment the pool of potential donors.
  - Enter potential donors into a gift-range table.
  - Explain the placement of each donor.
  - Describe the potential for reaching campaign goals.
  - Identify any interest areas or relationships to the organization that could lead to increased giving on the part of each potential donor.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.1.8 Ask volunteers, donors, board members, and/or staff to identify and qualify prospects.

1.1.8 Given the need to identify prospects for a capital campaign, the learner will be able to develop a list of the structure, methods, needed materials and agenda for a prospect identification and screening meeting.

ENABLING OBJECTIVES:

- Describe the key principles of the Donor Bill of Rights and the AFP Code of Ethics that apply to the sharing of donor information with staff and leadership volunteers.
- Explain—
  - The purpose of prospect identification.
  - The role volunteers, board and staff can and should play in the process.
- Develop a desired outcome, a potential structure and methods for a prospect identification and screening session.
- Describe the materials and information that should be made available at a prospect identification and screening session.
- Prepare a sample agenda for the screening meeting.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - ethical and legal considerations that apply to sharing prospect information with staff and leadership volunteers.
  - purpose of prospect identification and screening.
  - role of volunteers, board members, and staff in the process.
  - methods of prospect identification and screening.
  - how to organize a prospect identification and screening meeting.
  - what materials to prepare for a prospect identification and screening meeting.
- Given an organization's case for support, information on its volunteers, board members, and staff, and its set of donor profiles, one or more learners will—
  - Decide who should participate in a prospect identification and screening meeting for a capital campaign and explain why.
  - Prepare a meeting announcement that explains the—
    - purpose and goals of the meeting.
    - expected outcome.
    - applicable legal and ethical standards to be met.
    - respective roles of volunteers, board members, and staff in the process.
  - Prepare an agenda for the meeting that will result in a list which identifies and ranks prospects as highly, possibly, or questionably probable.

- Prepare a list of ethical and legal guidelines for meeting participants to use during the prospect identification and screening process.
- Develop a process for identifying prospects.
- Create a checklist that meeting participants can use to evaluate the prospects whom they identify.

LEVEL OF PRACTICE

Entry Level (1-5 years)

1.1.9 Create an aggregate profile by identifying characteristics common to various segments of the donor pool.

1.1.9 Given a set of donor profiles, the learner will be able to create an aggregate profile for the donor pool, using variables such as gift level, interest areas, relationship to institution, and institutional needs.

ENABLING OBJECTIVES:

- Define the relevant variables for creating an aggregate profile of a donor pool.
- Create an aggregate profile of the donor pool based on these variables.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - variables to use in an aggregate profile of a donor pool
    examples: gift level, interest areas, relationship to institution, institutional needs, relation of giving level to organizational involvement, past campaign support.
  - how to create an aggregate profile.
- Given a minimum of 50 sample donor profiles which include information on each donor's past and present annual giving, special or campaign gifts, involvement with the organization, professional and personal information, other volunteer and leadership roles, etc., one or more learners will—
  - Identify the key variables for defining the primary characteristics of the donor pool.
  - Prepare a detailed description of—
    - the major characteristics common to the donor pool.
    - the range of data along each of the defined variables for the donor pool.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.1.10 Maintain and update relevant donor and aggregate information so that it is accurate and accessible.

1.1.10 Given a list of types of donor and aggregate information, the learner will be able to define a system for maintaining and updating the various types of information.

ENABLING OBJECTIVES:

- Describe the key principles of the Donor Bill of Rights and the AFP Code of Ethics that apply to maintaining and updating donor and aggregate information.
- Prepare an outline of a systematic approach to incorporating new or revised donor and aggregate information, including—
  - Defined responsibilities for maintaining and updating information.
  - Confidentiality considerations.
  - Time lines for review and revisions.
  - Incorporation of contacts made.
  - Updating of gifts or pledges.
  - Other key elements of the records process.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - ethical considerations for maintaining and updating donor and aggregate information.
  - types of donor and aggregate information to maintain.
  - ways to incorporate both new and revised donor and aggregat information in a system, including—
    - defined responsibilities for maintaining and updating information.
    - confidentiality considerations.
    - time lines for review and revisions.
    - incorporation of contacts made.
    - updating of gifts or pledges.
    - other key elements of the records process.
- One or more learners will—
  - Review the AFP Code of Ethics, AFP Principles of Practice, Donor Bill of Rights, and other current literature.
  - Identify key principles relevant to maintaining and updating donor and aggregate information in their organizations.
- Given a list of types of donor and aggregate information, one or more learners will define a system for maintaining and updating the various types of information involved.

- One or more learners will—
  - Prepare and deliver a presentation about key issues and considerations regarding donor information management for staff and volunteers who have access to or responsibility for such information.
  - Evaluate the presentation, focusing on what was effective and what could be improved.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.1.11 Exercise appropriate confidentiality in sharing and disseminating prospect and donor information.

1.1.11 Given an organization's policies and procedures for sharing and disseminating donor information, the learner will be able to critique these policies and procedures in light of federal/state or provincial/local legal and ethical standards.

ENABLING OBJECTIVES:

- Describe the key federal, state or provincial, and local laws that apply to an organization's policies and procedures for sharing and disseminating donor information.
- Describe the key principles of the Donor Bill of Rights and the AFP Code of Ethics that apply to an organization's policies and procedures for sharing and disseminating donor information.
- Identify components of an organization's policies and procedures that fail to address ethical and legal issues related to sharing and disseminating donor information.
- Develop policies and procedures that conform to legal and ethical standards for sharing and disseminating donor information where they are lacking.
- Describe internal organizational practices that will encourage and ensure use of ethical and legal policies and procedures for sharing and disseminating donor information.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - key federal, state or provincial, and local laws that apply to sharing and disseminating donor information.
  - key ethical considerations for sharing and disseminating donor Information.
  - internal organizational practices that will encourage and ensure legal and ethical policies and procedures for sharing and disseminating donor information.

- Given an organization's policies and procedures for sharing and disseminating donor information, one or more learners will—
    - Describe the laws that apply to the organization's policies and procedures.
    - Describe the ethical principles that apply to the organization's policies and procedures.
    - Identify any aspects of the organization's policies and procedures that—
        - Violate any legal or ethical standards that apply.
        - Fail to address any legal or ethical standards that apply.
    - Develop legal and ethical policies and procedures where they are lacking.
    - Recommend internal practices that will encourage and ensure use of ethical and legal policies and procedures for sharing and disseminating donor information.
- Given an organization's policies and procedures regarding confidentiality and professional ethical standards such as the Donor Bill of Rights and AFP Code of Ethics, one or more learners will prepare an appropriate response to the following scenario.

    You are approached by a member of your organization's board of directors and asked for confidential donor information involving other board members.
    - What would you say?
    - How would you follow up on this situation with your supervisor or CEO?

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

Subrole 1.2 Cultivation/Education (also known as Donor Relationship Building/Donor Management)

Relationship-building to advance the vision and mission of the organization, in concert with the donor's philanthropic passions, interests, and priorities, as well as the organization's needs.

1.2.1 Develop a comprehensive cultivation plan including marketing, communications, events, and activities to inform, educate, and involve qualified prospects and identified prospect categories.

1.2.1 Given a list of qualified prospects and prospect categories for a particular organization and its needs, the learner will be able to create a written framework for a comprehensive cultivation and education plan.

ENABLING OBJECTIVES:

- Define donor cultivation and give examples of cultivation methods.
- Describe the key principles of the Donor Bill of Rights and the AFP Code of Ethics that apply to donor cultivation.
- Explain the definition of marketing and illustrate its application to donor cultivation.
- Explain the definition of communication, and give examples of communication methods and their roles in donor cultivation.
- Describe methods of managing and tracking donor cultivation activities.
- List examples of staff and volunteer roles in donor cultivation that are geared to elevate the donor's connection to the organization.
- Identify cultivation activities appropriate to different donor segments (i.e. direct mail donors, smaller donors, major gift donors, corporations, and foundations).
- Outline a written cultivation and education plan that incorporates the above elements.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - definition of donor cultivation.
  - ethical considerations for donor cultivation.
  - elements in a donor cultivation and education plan.
  - cultivation methods.
  - definition of marketing.
  - application of marketing to donor cultivation.
  - definition of communication.
  - communication methods and their roles in donor cultivation.
  - methods for managing and tracking donor cultivation activities.

- staff and volunteer roles in donor cultivation and how they can be used to strengthen the donor's connection to the organization.
- cultivation activities appropriate to different donor segments (including direct mail donors, smaller donors, major gift donors, corporations, and foundations).

■ Given a list of qualified prospects and prospect categories for a particular organization and its case for support, one or more learners will create a written outline of a comprehensive cultivation and education plan.

The outline will include marketing, communications, events, and activities directed to informing, educating, and involving qualified prospects and identified prospect categories.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)
Mid Level (6-9 years of experience)

1.2.2 Design specific cultivation strategies, using individual and aggregate donor profiles, to engage donors and potential donors in the vision and mission of the organization.

1.2.2 Given individual and aggregate donor and prospect profiles for a particular organization, the learner will be able to identify specific cultivation strategies and steps that will engage donors and prospects in the vision and mission of the organization.

ENABLING OBJECTIVES:

- Describe the key principles of the Donor Bill of Rights and the AFP Code of Ethics that apply to donor cultivation strategies.
- Link individual and aggregate donor profiles with the vision and mission of the organization.
- Describe ways to involve volunteers and staff leadership in the cultivation process.
- Develop specific examples of cultivation strategies and steps to use that will maximize gift return on subsequent solicitation.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - ethical considerations that apply to donor cultivation activities
  - how to link individual and aggregate donor prospect profiles to the vision and mission of an organization
  - cultivation strategies

- ways to involve volunteers and staff leadership in specific cultivation strategies
- how to use cultivation strategies and specific steps to maximize gift return on subsequent solicitation.

- Given individual and aggregate donor and prospect profiles for a particular organization, a description of its vision and mission, and a description of its volunteers and staff leaders, one or more learners will—
  - Describe how to link different profiles to the organization's vision and mission.
  - Identify specific appropriate cultivation strategies and steps to use.
  - Describe ways to involve volunteers and staff leaders from the organization in cultivating its donors and prospects.
  - Explain how the cultivation strategies and steps chosen will maximize gift return on subsequent solicitation.
- One or more learners will—
  - Describe the main topics on volunteers' roles and responsibilities in donor cultivation to include in a training session for volunteer leaders.
  - Suggest possible training activities that could be used.

LEVEL OF PRACTICE

Entry level (1-5 years of experience)

- One or more learners will—
  - Develop a training session for an organization's volunteer leaders on their roles and responsibilities in donor cultivation.
  - Role-play the training session. (One person plays the trainer and the rest play the volunteer leaders for the organization.)
  - Evaluate the training session in terms of what was effective and what could be improved.
  - Suggest revisions that will improve the session.
- One or more learners will—
  - Describe examples of cultivation strategies that they have used.
  - Analyze why each strategy was effective or not.

LEVEL OF PRACTICE

Mid-level (5-9 years of experience)

1.2.3 Implement cultivation plans (e.g., events, print and electronic media, personal contacts, volunteer opportunities) to educate and inform constituencies and generate increased opportunities for participation in and support of the vision and mission of the organization.

1.2.3 Given a detailed cultivation plan, the learner will be able to:

- Define specific implementation steps for all elements of the plan.
- Define the criteria for measuring the success of its implementation.

ENABLING OBJECTIVES:

- Define desired outcomes resulting from implementation of the plan.
- Define specific steps for implementing each of the elements of the plan (events, print and electronic media, personal contacts, volunteer opportunities), including examples of implementation methods.
- Define methods for measuring progress of the plan's implementation.
- Define possible volunteer roles and responsibilities in oversight of plan implementation.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - legal and ethical considerations for donor confidentiality that apply to cultivation information.
  - how to define desired outcomes for a cultivation plan.
  - how to implement the different elements of a cultivation plan (including events, print and electronic media, personal contacts, and volunteer opportunities), using time lines and action plans.
  - how to measure progress in implementing a cultivation plan, using tracking, reporting, establishment of a baseline, and measurement of outcomes.
  - possible volunteer roles and responsibilities in oversight of plan implementation.
- Given a detailed description of a cultivation plan for an organization, one or more learners will develop a time line (weekly or monthly) and action plan for each cultivation method in the plan.

  For each method, include expected outcomes, number of donors to be cultivated, and staffing (volunteers, staff, and clients, if applicable).
- Given a detailed description of a cultivation plan for an organization, one or more learners will develop a set of procedures for tracking each cultivation method, including—
  - how outcomes will be measured.
  - how a baseline will be established.

- where and how the outcomes will be entered in the organization's donor system.
- types and frequency of reports needed.

- Given a set of procedures for tracking the results of different cultivation methods in an organization's cultivation plan, one or more learners will—
  - Review the procedures for compliance with the Donor Bill of Rights and state and federal laws regarding donor confidentiality.
  - Discuss how cultivation information should properly be shared with key volunteers, staff, and clients (if applicable).

LEVEL OF PRACTICE

Entry level (1-5 years of experience)

1.2.4 Respond to donors' passions, interests and priorities to promote a positive relationship between donors, the organization and its mission, and the organization's beneficiaries.

1.2.4 Given a detailed donor profile, including a prospect interview summary, and a description of the organization and its needs, the learner will be able to define a specific approach for meeting with the donor which will respond to the individual, educate him or her on the organization's needs, and build a stronger relationship between the individual and the organization's mission.

ENABLING OBJECTIVES:

- Identify the key elements in the donor profile that can be related to the organization's mission and beneficiaries.
- Describe ways to link these elements with the needs of the organization.
- Develop a plan for meeting with the donor, including key areas to be covered and expected outcomes.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - how to identify key elements in a donor's profile that can be related to an organization's mission and beneficiaries example: an individual donor's family, occupation, education, and hobbies.
  - how to link relevant items in a donor's profile to the needs of an organization.
  - how to plan, conduct, and follow up on a meeting with a donor, including key areas to be covered and expected outcomes.

- Given a detailed donor profile, including a prospect interview summary, and a description of an organization and its needs, one or more learners will—
  - Review the mission of the organization, its current programs, personnel, and needs.
  - Relate the relevant organizational information to key elements in the donor's profile.
  - Plan a site visit to the organization by the donor, including
    - Identify the organization's programs, people, or activities of interest to the donor that most correspond to the organization's current needs.
    - Decide on key areas to be covered during the visit and expected outcomes.
    - Plan appropriate arrangements for the donor's visit, including travel, accommodations, and meals.
    - Prepare talking points for preparing all personnel who will be involved in the donor visit, including the purpose of the visit and its importance for the organization.
    - Plan how to follow up with the donor after the meeting, including identifying who should make the contact.
    - Role-play the most effective way for the organizational representative(s) to ask the donor for the gift.

LEVEL OF PRACTICE

All Levels

1.2.5 Initiate, maintain and enhance continuing and mutually beneficial relationships with volunteers, donors, and qualified prospects.

1.2.5 Given a description of an organization's volunteers, donors, and qualified prospects, the learner will be able to define specific methods to initiate, maintain, and enhance relationships with each of these groups.

ENABLING OBJECTIVES:

- Identify the basic elements of good relationships with each group—volunteers, donors, and qualified prospects.
- Identify examples of different relationship-building strategies appropriate to each of the three groups.
- Develop an example of a plan to maintain contact and communication with those in each of the three groups.
- Identify the most appropriate manager of each relationship with every donor, prospect and volunteer in order to maintain continuity and integrity of the relationship.
- Identify events and times within the organization's year when it may be appropriate for certain staff and/or volunteers to interact with particular donors and qualified prospects.

- Develop strategies for incorporating donor recognition into ongoing relationships with those in each of the three groups.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - basic elements of good relationships with donors, with volunteers and with prospects.
  - how to recognize subcategories within each of the three groups that require different relationship-building strategies.
  - relationship-building strategies appropriate to different types of subcategories.
  - ways to maintain contact and communication with different types of subcategories.
  - how to identify the most appropriate manager for a relationship with a particular donor, prospect, or volunteer in order to maintain the continuity and integrity of the relationship.
  - events and times during the organization's year when it may be appropriate for certain staff and/or volunteers to interact with particular donors and qualified prospects.
  - ways to incorporate donor recognition into ongoing relationships with donors, volunteers, and prospects.
  - how to construct a donor recognition table or matrix.
- Given a description of an organization's volunteers, donors, and qualified prospects, as well as a description of its key staff and Board members, one or more learners will—
  - Identify subcategories within each group (volunteers, donors, and qualified prospects) that have characteristics that require different relationship-building strategies.

    example: For donors, differentiating characteristics might include ranking of gift size, continuity/giving history, history of involvement with the organization. The result will be a set of subcategories for each of the three groups.
    - Identify appropriate relationship-building strategies for each subcategory.
      - Develop a calendar of recommended contact and communication for each of the subcategories.
      - Allocate relationship-building responsibilities among key staff and Board members.

        Who is the appropriate manager of which relationships?

        When and how should they communicate with members of their assigned subcategories?

        What is the rationale for the communication you selected?
      - Develop a donor recognition table or matrix that defines who should recognize which donors at which levels with which methods.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

Subrole 1.3 Solicitation

Actions and processes that lead to and include inviting donors, stakeholders, and prospects to invest resources in the mission and vision of charitable organizations.

1.3.1 Articulate the case for support with personal conviction and enthusiasm.

1.3.1 Given background information on an organization and its case for support, the learner will be able to:

- Identify the most important emotional and rational elements that could be presented to individuals and to groups of prospects, current donors, and the media.
- Prepare the elements for presentation.

ENABLING OBJECTIVES:

- Define the elements in the background information and the case for support that can have the most *emotional* appeal to current donors, donor prospects, and the general public through the media.
- Define the elements in the background information and the case for support that can have the most *rational* appeal to current donors, donor prospects, and the general public through the media.
- Prepare a brief presentation of the case and background information that would be compelling to one of these groups.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - what a case for support consists of.
  - common motivations for donors to give.
  - how to identify the emotional and rational elements in an organization's background and case for support that will appeal to current donors, to donor prospects, and to the general public through the media.
  - how to present an organization's case for support and background information in a compelling way to current donors, to donor prospects, and to the general public through the media.
- Given background information on an organization and its case for support, one or more learners will—
  - Define the elements in the background information and case for support that can have the most emotional appeal to current donors, to donor prospects, and to the general public through the media.
  - Define the elements in the background information and case for support that can have the most rational appeal to current donors, to donor prospects, and to the general public through the media.
  - Prepare a formal presentation for each of the three groups that would effectively articulate the case for support to each.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.3.2 Determine appropriate resources (supportive materials) for the case for support.

1.3.2 Given a case for support of an organization, the learner will be able to develop materials to strengthen the organization's case.

ENABLING OBJECTIVES:

- Identify key elements in a case for support that should be strengthened by additional materials.
- Describe examples of appropriate print and visual materials to strengthen the case for support.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - types of materials that strengthen an organization's case for support.
  - how to decide what supportive materials to use for an organization's case for support.
- Given a case for support of an organization—
  - Review the case for support.
  - Identify key elements in the case that need to be strengthened by additional materials.
  - Decide what print and visual materials could be used to strengthen those elements in the case.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.3.3 Identify and recruit volunteers and professionals to carry out solicitation.

1.3.3 Given a description of an organization and its case for support, the learner will be able to establish criteria for identification and recruitment of volunteers and professionals for solicitation of gifts.

ENABLING OBJECTIVES:

- Define ways to measure and rank the value of possible information sources that can be used to identify volunteers and professionals for solicitation of gifts.
- Define decision-making principles for selecting volunteers and professionals for solicitation of gifts.
- Review a list of prospective volunteers and professionals for gift solicitation and select a preliminary list of individuals to recruit, based on the established criteria.

- Develop a specific strategy for recruiting volunteers and professionals for solicitation of gifts, including appropriate cultivation methods, means of approach, follow-up and evaluation, and persons to be involved.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
    - respective benefits of using volunteers and professionals in the solicitation process.
    - information sources to use to identify volunteers and professionals for solicitation of gifts.
    - how to evaluate these information sources.
    - how to use the sources to identify personnel for solicitation of gifts.
    - decision-making principles for selecting volunteers and professionals for solicitation of gifts.
    - how to select volunteers and professionals to recruit, based on established criteria.
    - strategies for recruiting volunteers and professionals for solicitation of gifts, including—
        - appropriate cultivation methods.
        - means of approach.
        - follow-up and evaluation.
        - persons to be involved.
- Given a description of an organization and its case for support, as well as information on its volunteers and available professionals, one or more learners will—
    - Compare and contrast the benefits of using volunteers and professionals in the solicitation process for the organization.
    - Decide the criteria for selecting volunteers to solicit gifts for the organization.
    - Develop a ranked list of appropriate information sources for identifying volunteers.
    - Decide the criteria for selecting professionals to solicit gifts for the organization.
    - Develop a ranked list of appropriate information sources for identifying professionals.
    - Select a preliminary list of volunteers and professionals to recruit for the solicitation of gifts.
    - Develop strategies for recruiting the volunteers and professionals, including—
        - cultivation methods.
        - means of approach.
        - follow-up and evaluation.
        - persons to be involved.

- Explain the choices made at each of the preceding steps.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.3.4 Train, educate, and support volunteers and professionals in solicitation principles, techniques, and procedures.

1.3.4 Given a description of an organization and its case for support, the learner will be able to develop a training program for volunteers and professionals in solicitation principles, techniques, and procedures.

ENABLING OBJECTIVES:

- Describe the desired outcomes for a training session for volunteers and staff in solicitation principles, techniques and procedures, as well as a potential structure, training methods, and types of session leaders.
- Identify the materials and information that should be made available at a solicitation training session for volunteers and staff.
- Identify the solicitation training needs of volunteers and staff in the following areas:
  - Presentation skills.
  - Institutional policies/procedures.
  - Institutional case.
  - Listening skills.
  - Interviews.
  - One-on-one.
  - Negotiating skills.
  - Use of tools (e.g., videos).
  - Donor feedback.
  - Volunteer and staff roles and responsibilities.
  - Peer-to-peer expectations.
  - Group presentations.
  - Solicitation strategies and steps.
  - How to ask.
  - Donor motivation.
  - Application of profiles (donor/volunteer) to development of solicitation.
  - Handling questions/objections.

- Compare and contrast use of the following education and training methods with volunteer and staff solicitors:
  - Videos.
  - Role-playing.
  - Individual counseling/coaching.
  - Case studies.
  - Peer-to-peer.
- Identify ways to measure outcomes of the training program.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - desired outcomes for a solicitation training session.
  - effective session designs, training methods, and types of leaders.
  - how to determine the solicitation skills, knowledge, and attitudes that session participants will need.
  - how to decide what materials and information session participants will need.
  - how to decide what types of training methods to use in a solicitation training session.
  - how to measure the outcomes of a solicitation training session.
- Given the description of an organization, its case for support, and its volunteers and staff members recruited to solicit gifts, one or more learners will—
  - Establish desired outcomes for a solicitation training session for the organization's volunteers and staff who will solicit gifts.
  - Decide how to organize the session and the type of leader(s) who should conduct it.
  - Determine what solicitation skills, knowledge, and attitudes the volunteers and staff members will need.
  - Decide what materials and information should be provided for the session.
  - Decide what learning activities to use for specific solicitation skills, knowledge, and attitudes.
  - Decide how to determine whether the desired outcomes for the training session were achieved.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.3.5 Develop solicitation strategies that make use of techniques (solicitation team and materials) that will maximize the outcome of the solicitation.

1.3.5 Given descriptions of a pool of potential volunteer and professional solicitors, a description of the case for support of an organization, and examples of potential donor prospects, the learner will be able to develop teams and materials appropriate to the case and the potential prospects.

ENABLING OBJECTIVES:

- Review a prospect list and match appropriate prospective solicitors (volunteers and staff) with each prospect and his or her background and interests.
- Describe appropriate materials needed for each solicitation.
- Assess the skills of the prospective professional solicitors, and pair them with appropriate staff and volunteers to optimize effectiveness and maximize gift potential.
- Identify any supplemental training or background information that solicitation teams need.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - how to match prospective solicitors (volunteer and staff) with a prospect and his or her background or interests.
  - how to decide what materials are appropriate to use with a given prospect for a given case for support.
  - how to create solicitation teams of professional solicitors, volunteers, and staff to optimize the team's effectiveness and maximize the gift potential.
  - how to identify any supplemental training or background information a solicitation team will need.
- Given a description of a case for support of an organization, some potential donor prospects, and a pool of potential volunteers, staff, and professional solicitors, one or more learners will—
  - Create at least one solicitation team for one prospective donor.
  - Decide what materials a team will need for a particular solicitation.
  - Identify any supplemental training or background information the solicitation team will need for the particular solicitation.
  - Explain their choices.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.3.6 Secure appointments with donors and prospects.

1.3.6 Given a comprehensive profile for a major gift prospect, the learner will be able to describe an appropriate strategy for securing a first meeting.

ENABLING OBJECTIVES:

- Define a systematic approach for contacting donors and prospects for appointments, including examples of:
  - appropriate persons to make contacts.
  - methods and content for contacts.
  - methods for responding to objections to setting appointments.
  - confirmation procedures.
  - possible locations and their advantages and disadvantages.
  - record-keeping.
- Communicate with a donor prospect for the purpose of setting an appointment for a first meeting.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s)—
  - how to determine the appropriate person to make initial contact with a major gift donor or prospect.
  - methods for making initial contacts.
  - information to communicate during an initial contact.
  - how to respond to objections to setting an appointment.
  - advantages and disadvantages of different locations for a first meeting.
  - how to confirm an appointment.
  - recordkeeping for initial contacts with donors and prospects.
- Given a comprehensive profile for a major gift prospect, one or more learners will—
  - Decide the type of person who would be appropriate to make the initial contact with this prospect.
  - Decide on an appropriate method for making the initial contact.
  - Decide what information to communicate during the initial contact.
  - Anticipate possible objections to making an appointment and brainstorm how to respond to them.
  - Decide on a good location for the first meeting with this prospect.
  - Decide how to confirm an appointment with this prospect.
  - Role-play asking the prospect for a first meeting.

- Evaluate the communication with the prospect, focusing on what was effective and what could be improved.
- Decide what information should go into the record of the initial contact.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.3.7 Match the prospects' interest and potential with current priorities of need in order to maximize the gifts.

1.3.7 Given a description of an organization and its cause and needs, and a description of donor prospects for the organization, the learner will be able to devise appropriate strategies and a time line to match the prospects' interests and potential with organizational funding priorities to maximize the gifts.

ENABLING OBJECTIVES:

- Describe links between donor prospects' interests and the organization's funding priorities.
- Define ways to present and establish these links to each of the organization's prospects.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - how to identify the links between a donor prospect's interests and potential and an organization's funding priorities.
  - ways to present these links to a donor prospect.
  - ways to establish these links, including how to develop desired outcomes and an appropriate time line for cultivating the donor prospect.
- Given a description of an organization and its cause and needs, and the description of a donor prospect, one or more learners will—
  - Identify possible links between the prospect's interests and the organization's funding priorities.
  - Decide how to explore possible links during a meeting with the prospect.
  - Brainstorm possible ways to introduce links between the prospect's interests and the organization's funding priorities.
  - Role-play a meeting with the donor prospect to—
    - Determine the prospect's interest(s) in the organization and potential for involvement and support.
    - Begin to introduce links between the prospect's interests and the organization's funding priorities.

- Evaluate the meeting.
  - What was effective?
  - What could be improved?
  - What did you learn about the links between the prospect's interests and the organization's funding priorities?
  - What did you learn about the prospect's potential for giving?
- Decide on desired outcomes for this donor prospect.
- Develop an appropriate strategy and time frame for accomplishing the desired outcomes.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.3.8 Use appropriate communication options to interact actively with donors

1.3.8 Given a description of an organization, its case for support, and a prospective donor, the learner will be able to identify and match solicitor(s), conditions, and methods of communication that optimize chances for success of the "ask."

ENABLING OBJECTIVES:

- Define the advantages and disadvantages of each of the various communication methods (e.g., phone, face-to-face meeting, letter, email) that could be used with donor prospects.
- Identify different conditions that could influence communication with a donor prospect, e.g., timing and place.
- Define specific communication methods that should be used with a given donor for a given organization with defined needs.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - advantages and disadvantages of various methods for communicating with donor prospects.
  - conditions that influence communication with a donor prospect, e.g., timing and place.
  - how to match solicitors, methods of communication, and conditions in order to optimize chances for an eventual successful solicitation.
- Given a description of an organization, its case for support, and a prospective donor, one or more learners will—
  - Select methods of communication that would build towards a successful "ask" in this situation.

- Discuss communication conditions that would optimize chances for an eventual successful solicitation in this situation.
- Decide what type of solicitor(s) would work most effectively with the prospect, the methods of communication, and the conditions involved.
- Discuss the impact on success of using other means of communication in this situation.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.3.9 Ask donors and prospects for gifts.

1.3.9 Given a description of an organization and its needs, the composition and backgrounds of a solicitation team, and the background information on a donor (including previous giving, connections to the organization, research, and prospect rating), the learner will be able to define the specifics of the "ask," including the desired outcome, method, structure, content, and roles and responsibilities of the contact.

ENABLING OBJECTIVES:

- Define specifics of the "ask" for a donor, including desired outcomes, content, communication methods, and steps.
- Explain the differences in "asks" for annual, capital, endowment, planned, and special gifts, including examples of the content and steps for each.
- Define the different roles and responsibilities of participants on a solicitation team for an "ask."
- Identify various communication methods for carrying out the "ask" and describe the advantages and disadvantages of each.
- Ask for a gift.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - the specifics of an "ask," including possible desired outcomes, content, communication methods, and steps.
  - differences in the content and steps for "asks" involving annual, capital, endowment, planned, and special gifts.
  - different roles and responsibilities for members of the solicitation team during an "ask."
  - advantages and disadvantages of using different communication methods for an "ask."

- Explain and illustrate the meaning of the phrase, "Successful solicitation involves asking the right prospect by the right person at the right time for the right reason, for the right amount, using the right method."
- Given a description of an organization and its needs, the composition and backgrounds of a solicitation team, and the background information on a donor (including previous giving, connections to the organization, research, and prospect rating), one or more learners will—
  - Decide what type of gift to ask for.
  - Decide on the desired outcome, the content, communication method(s), and steps to use for the "ask."
  - Decide on the roles and responsibilities of the different members of the solicitation team for the "ask."
  - Explain the choices in the preceding steps.
  - Prepare a script for the "ask."
  - Role-play the "ask" up to the prospect's initial response. (See1.3.10 activity for continuation and completion of the "ask")
  - Evaluate the "ask," focusing on what was effective and what could be improved.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.3.10 Observe the donor's reaction to the gift request and respond to the donor's questions, issues and concerns.

1.3.10 Given a gift request scenario, the learner will be able to describe appropriate responses to donor questions and concerns.

ENABLING OBJECTIVES:

- Describe some possible questions or objections that might occur during a gift solicitation.
- Define possible responses to each of these possible questions and objections.
- Describe methods for responding to major concerns or issues raised by the possible donor.
- Define ways to present recognition options and possible special recognition.
- Describe how to deal with negative responses to gift requests.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - possible questions or objections that a prospective donor might raise during a gift solicitation and how to respond to them.

- possible major concerns or issues a prospective donor might raise during a gift solicitation and how to respond to them.
- how to present possible recognition options and forms of special recognition during an "ask."
- how to respond to a negative response to a gift request.

- Continue the role-play from 1.3.9—
  - Role-play responding to the questions, objections, and issues orconcerns that the "prospective donor" raises during the "ask." Include a presentation of recognition options and possible forms of special recognition.
  - Stop and evaluate the solicitation team's response to the prospect's questions, objections, issues, and concerns.
  - Role-play responding to the "prospective donor's" refusal to make a gift.
  - Stop and evaluate the solicitation team's response to the refusal.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.3.11 Complete appropriate follow-up to the solicitation.

1.3.11 Given a description of a solicitation call outcome, the learner will be able to develop a strategy for follow-up after the call.

ENABLING OBJECTIVES:

- Develop a list of questions to be addressed and other information to be provided to the prospective donor after the call.
- Develop a strategy for contacting the prospective donor, including a time line and identification of the appropriate person and method for making the contact.
- Identify additional follow-up strategies that may be needed.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - what information to provide to a prospective donor after a solicitation call.
  - who should contact a prospective donor after a solicitation call, when, and how.
  - additional follow-up strategies that may be needed.
- Given a description of a prospective donor, a solicitation team, and a solicitation call outcome, one or more learners will—
  - Develop a list of questions to be addressed and other information to be provided to the prospective donor after the call.

- Decide who should contact the prospective donor, when, and how, in order to maximize the chance of successfully closing the "ask."
- Identify additional follow-up strategies that may be needed in this situation.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.3.12 Close the gift and confirm next steps.

1.3.12 Given a description of a gift request scenario, the learner will be able to identify next steps to ensure the successful closure of a gift.

ENABLING OBJECTIVES:

- Describe gift types appropriate for a prospect and an organization.
- Describe possible recognition options appropriate to the size and nature of the gift.
- Describe possible scenarios for helping prospective donors who:
  - Face particular constraints.
  - Have specific objections to the size or nature of the gift sought.
- Develop a strategy for involving appropriate volunteer and staff solicitors in the closure process.
- Establish a time line for follow-up and closure.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - how to match different gift types to a prospect and an organization.
  - recognition options appropriate to the size and nature of a gift.
  - ways to help prospective donors who face particular constraints or have specific objections to the size or nature of the gift sought.
  - strategies for involving appropriate volunteer and staff solicitors in a successful closure of a gift.
  - how to establish a time line for follow-up and closure.
- Given a description of a gift request scenario, including a description of the organization and its needs, the prospective donor, and the solicitation team, one or more learners will—
  - Identify gift(s) which might maximize the prospective donor's gift potential.
  - Identify possible recognition options that would be appropriate to the size and nature of the identified gift.

- Strategize how to help the prospective donor, if the person
  - faces particular constraints.
  - has specific objections to the size or nature of the gift sought.
- Decide how to involve volunteer and staff members of the solicitation team in the closure process.
- Establish a time line for follow-up and closure in this situation.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.3.13 Use appropriate direct response techniques to acquire a new donor, make a solicitation or maximize a solicitation underway.

1.3.13 Given the background of an organization, its case for support, and examples of potential donor prospects or current donors, the learner will be able to identify and describe the rationale for using a specific direct response technique, including Internet fundraising, direct mail, and telemarketing, to maximize the outcome of the solicitation.

ENABLING OBJECTIVES:

- Describe how Internet fundraising, direct mail, and telemarketing can be used to achieve fundraising objectives, including acquiring new donors and renewing current and lapsed donors.
- Develop an integrated direct response strategy, including internet fundraising, direct mail, and telemarketing, to achieve fundraising objectives.
- Describe benchmarks for measuring progress towards direct response fundraising objectives.
- Identify possible reporting methods and the content of progress reports.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - how each of the primary direct response techniques (Internet, direct mail, telemarketing) can be used to achieve short-term-objectives and long-term goals for
    - acquiring new donors.
    - making a solicitation to current and lapsed donors.
    - maximizing a solicitation underway.
  - possible barriers to successful use of direct response techniques and methods to overcome them.
  - how to develop an integrated direct response strategy to achieve fundraising objectives.

- benchmarks for measuring progress towards direct response fundraising objectives.
- possible reporting methods and the content of progress reports.

- Given the background of an organization, its case for support, and profiles of potential donor prospects and current donors, one or more learners will prepare a written integrated direct response fundraising plan in outline form for the organization. The plan will include—
  - short-term objectives and long-term goals.
  - an explanation of how each of the primary direct response strategies will be used to achieve the short-term objectives and long-term goals.
  - a list of possible barriers to success and methods to overcome them.
  - benchmarks for measuring progress towards achieving fundraising objectives and goals.
  - reporting methods and a description of the content of progress reports.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.3.14 Evaluate the results of the solicitation and its outcomes.

1.3.14 Given a description of a gift request scenario, the learner will be able to analyze the solicitation strategy to evaluate donor response and determine future steps.

ENABLING OBJECTIVES:

- List the strategies used in the solicitation and evaluate their suitability, based on donor response.
- Describe future steps, including how to respond to a “no” to the “ask.”
- Define criteria for evaluating the performance of the solicitation team and providing feedback to members.
- Define ways to ensure:
  - Timely and appropriate response to the solicitation by the prospective donor.
  - Agreement on the terms and conditions of the gift.
  - Agreement on recognition arrangements.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - how to identify solicitation strategies used.
  - how to evaluate the suitability of solicitation strategies used, based on donor response.

- follow-up or future steps to take when the donor response to the "ask" is a "yes."
- follow-up or future steps to take when the donor response to the "ask" is a "no."
- criteria for evaluating the performance of a solicitation team.
- how to provide the members of a solicitation team with feedback on their performance.
- ways to ensure
  - a timely and appropriate response to the solicitation by the prospective donor.
  - agreement on the terms and conditions of the gift.
  - agreement on recognition arrangements.

- Given a description of a gift request scenario, one or more learners will—
  - Identify the solicitation strategies used.
  - Evaluate the suitability of the solicitation strategies used.
  - Decide on follow-up or future steps to take.
  - Evaluate the performance of the solicitation team.
  - Decide how to provide members of the solicitation team with feedback on their performance.
  - Decide how to ensure a timely and appropriate response to the solicitation by the prospective donor.
  - Decide how to ensure agreement on the terms and conditions of the gift, if the response is a "yes."
  - Decide how to ensure agreement on the recognition arrangements, if the response is a "yes."

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

Subrole 1.4 Donor/Volunteer Recognition and Stewardship

Policies and practices designed to maximize the benefits of giving for all donors and volunteers over the long term.

1.4.1 Develop recognition programs, including policies and procedures to honor donors and volunteers in ways appropriate to the size and nature of their gifts.

1.4.1.1 Identify the elements of a donor and volunteer recognition and stewardship program.

ENABLING OBJECTIVES:

- Explain the importance and value of donor and volunteer recognition to the success of an integrated fundraising and stewardship program.
- Describe legislative standards that relate to restrictions on gift recognition.
- Define principles for donor recognition and stewardship in keeping with the Donor Bill of Rights, the AFP Code of Ethics, and other legal and ethical practices.
- List the components that should be included in a formal recognition and stewardship program.
- Describe the role of the fundraising team in the development of volunteer recognition programs.
- Explain different factors to consider in deciding how to recognize various donor segments—including individuals, corporations and foundations.
- List key individuals and groups who should be consulted on the development of an institutional recognition program.
- Describe some examples of principles and procedures for negotiating with major donors about special recognition, including possible limitations on donor-desired recognition and gift restrictions.
- Contrast corporate giving and sponsorship, and explain the implications for developing a recognition plan.
- Provide examples of forms of donor recognition that would motivate individual donors.
- Give examples of unique forms of recognition that specific types of organizations (e.g., health, education, and religious) might use.
- Provide examples of low cost ways to recognize donor support for a start-up organization with a limited budget for donor recognition.

1.4.1.2 Given an aggregate profile of donors and of volunteers, and an organization's mission, background, constituents, and plans, the learner will be able to develop a recognition and stewardship program, including policies and procedures to honor donors and volunteers in a timely manner.

ENABLING OBJECTIVES:

- Describe the key principles of the Donor Bill of Rights and the AFP Code of Ethics that apply to donor recognition and gift stewardship.
- Develop an educational session plan to teach staff and volunteers the importance of donor and volunteer recognition and stewardship.
- Cite examples of financial guidelines and hard costs that may apply to a donor and volunteer recognition and stewardship program.
- Explain the role and requirements of a database in the donor and volunteer recognition and stewardship cycle.
- Develop a donor and volunteer recognition and stewardship program for the organization.
- Design a template to manage a donor and volunteer recognition and stewardship program with assigned roles to key volunteers and staff.
- Describe key methods of evaluation and measures of success for a donor and volunteer recognition and stewardship program.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - legal and ethical considerations for gift recognition and stewardship.
  - importance and value of donor and volunteer recognition to the success of a fundraising and stewardship program.
  - elements of a recognition and stewardship policy and program.
  - cost elements and financial guidelines for a recognition and stewardship program.
  - database roles and requirements in a recognition and stewardship cycle.
  - roles of key volunteers and staff in managing a donor and volunteer recognition and stewardship program.
  - evaluation methods and measures of success for a recognition and stewardship program.
  - role of the fundraising team in developing volunteer recognition programs.
  - factors to consider in deciding how to recognize different donor segments.
  - key individuals and groups to consult when developing an institutional recognition program.

    - principles and procedures for negotiating with major donors about special recognition, including possible limitations on donor-desired recognition and gift restrictions.
    - distinction between corporate giving and corporate sponsorship and the implications for a recognition program.
    - forms of donor recognition that would motivate individual donors.
    - forms of recognition unique to specific types of organizations (e.g., health, education, and religious).
    - low-cost ways to recognize donor support for a start-up organization with a limited budget for donor recognition.
- Given an aggregate profile of donors and of volunteers, and an organization's mission, background, constituents, and plans, one or more learners will develop a donor and volunteer recognition and stewardship program for the organization—
    - Discuss the legal and ethical aspects of recognizing donors and volunteers in this situation.
    - Decide what elements to include in the program.
    - Identify appropriate levels and types of recognition for donors and volunteers, including
        - what would be appropriate as a motivator.
        - how to appropriately recognize different levels of donor and volunteer commitment.
    - Identify the cost elements in the program.
    - Establish financial guidelines for the program that reflect the organization's circumstances.
    - Decide on database roles and requirements in the recognition and stewardship cycle.
    - Outline an educational session to communicate to staff and volunteers the importance of donor and volunteer recognition and stewardship.
    - Assign roles to key volunteers and staff for managing the recognition and stewardship program.
    - Establish evaluation methods and measures of success for the program.
    - Explain the choices made at each of the preceding steps.
- Given an aggregate profile of donors and of volunteers, and an organization's mission, background, constituents, and plans, one or more learners will discuss institutional considerations for both the recipient and donor organizations in the following areas—
    - Who should be involved in the development of the recognition program, in addition to the fundraising team.
    - Negotiation of recognition types and limits for major gifts.
    - Unique types and categories of recognition appropriate to the organization.

- One or more learners will—
  - Discuss specific issues related to recognition programs, e.g.,
    - Recognition programs for start-up or small organizations.
    - Using different forms of recognition as motivation for donors and volunteers.
    - Present a summary of the discussion.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.4.2 Implement appropriate acknowledgement, acceptance, and recognition practices, using multiple methods (both public and private) to express gratitude, in order to honor donors and volunteers.

1.4.2 Given a comprehensive set of gift acknowledgement, acceptance, and recognition policies and procedures, and an aggregate profile of donors and of volunteers, the learner will be able to match appropriate methods of expressing gratitude with donors and volunteers, in order to optimize the giving experience.

ENABLING OBJECTIVES:

- Describe the key principles of the Donor Bill of Rights and the AFP Code of Ethics that apply to gift acknowledgement, acceptance, and recognition.
- Define the differences between gift acknowledgement, acceptance, and recognition policies, including:
  - The specific need for each type of policy.
  - The ethical and legal principles behind each type of policy.
- Describe examples of the application of each of the three types of policies (acknowledgment, acceptance, and recognition) to:
  - Cash gifts.
  - Various types of noncash gifts (e.g., stocks, real property).
  - Unrestricted gifts.
  - Restricted gifts.
- Describe examples of donors' gift restrictions that may not be acceptable to a particular organization, and reasons why.
- Describe ways to decline offered gifts when restrictions or the nature of the possible gift do not meet organizational needs.
- Describe ways to ascertain the wishes of each donor, as they relate to recognition and the defined recognition program.

- Prepare a verbal response to a donor's complaint about the cost and confidentiality of an organization's recognition practices.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - the differences between gift acknowledgement, acceptance, and recognition, including the need for a specific policy for each.
  - ethical considerations for gift acknowledgement, acceptance, and recognition.
  - how to acknowledge, accept, and recognize
    - cash gifts.
    - types of noncash gifts (e.g., stocks, real property).
    - unrestricted gifts.
    - restricted gifts.
  - donors' gift restrictions that may not be acceptable to a particular organization and reasons why.
  - how to decline an offered gift when its restrictions or the nature of the possible gift do not meet organizational needs.
  - how to identify a donor's preferences related to recognition and a defined recognition program.
  - how to respond to a donor's complaint about the cost and confidentiality of an organization's recognition practices.
- In order to explore the motivations and expectation of donors, one or more learners will imagine they have the opportunity to make a one- million-dollar gift.

  Describe your ideal experience over a period of 12 months from the day the gift is received, in terms of acknowledgement and recognition from the institution you have chosen to gift.
- One or more learners will—
  - Research and compare gift acceptance policies from five different charitable organizations.
  - Discuss the similarities and differences in the policies.
- Given a description of a local environmental organization, one or more learners will—
  - Develop a list of gifts that would and would not be acceptable to the organization.
  - Role-play a conversation in which you explain to a donor why their gift to this organization is being declined.
  - Evaluate the discussion, focusing on what was effective and what could be improved.

- One or more learners will interview an experienced practitioner who has just completed a successful capital initiative about the institution's recognition strategy for the campaign.
- Given a description of an organization and an aggregate profile of its donors, one or more learners will develop recognition practices for an Annual Giving program that will honor the donors and optimize their giving experience.
- Given a description of an organization that has donors who wish to be very private in their giving and donors who wish very public acknowledgement of their philanthropy, one or more learners will brainstorm ways to honor both types of donors within the organization without offending either.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.4.3 Provide donors and volunteers with complete information related to tax implications of their charitable gifts.

1.4.3 Given an organization and its donors and prospects, the learner will be able to describe what and how to communicate to donors and volunteers regarding the tax implications of gifts.

ENABLING OBJECTIVES:

- Describe key principles of the Donor Bill of Rights and the AFP Code of Ethics that apply to communication with donors about tax implications of their gifts.
- List donor motivations for charitable giving in order of their importance to donors.
- Describe gift types in which tax considerations may play an important role in a donor's decision to make a certain type or size of contribution.
- Provide a list of external sources that should be consulted by the donor and/or fundraiser to respond to donor inquiries regarding gift types and tax implications.
- Explain the rationale for advising donors to consult with financial and other professional advisers and other family members before making a gift decision.
- Describe possible gift alternatives and the costs and net benefits of each to the donor.
- Describe the tax implications of making cash versus appreciated gifts.
- Develop guidelines for recognition of cash versus deferred gifts and a strategy for communicating the guidelines to donors.
- Describe the 50/30/20 rules and how they apply to donors.
- Develop a policy on designated gift restrictions.
- Explain the gift valuation process and how to obtain appropriate documentation.

- Identify the legislative body responsible in your community for the regulation and monitoring of charities and charitable tax receipts.
- Explain the definition of philanthropy and relate it to the provision of tax receipts for special events.
- Describe the benefits associated with special events that must be considered in the calculation of a charitable tax receipt.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
    - ethical considerations when communicating with donors about the tax implications of their gifts.
    - donor motivations for charitable giving and the order of their importance to donors.
    - gift types in which tax considerations may play an important role in a donor's decision to make a certain.
    - external sources that a donor or fundraiser should consult in order to answer donor inquiries about the tax implications of specific gift types.
    - additional sources that a fundraiser can consult in order to answer donor inquiries about the tax implications of specific gift types.
    - rationale for advising donors to consult with financial and other professional advisers and family members before making a gift decision.
    - possible gift alternatives and the costs and net benefits of each to the donor.
    - tax implications of making cash versus appreciated gifts.
    - guidelines for recognition of cash versus deferred gifts and how to communicate the guidelines to donors.
    - 50/30/20 rules and how they apply to donors.
    - policies on designated gift restrictions.
    - gift valuation process and how to obtain appropriate documentation.
    - the legislative body responsible for regulating and monitoring charities and charitable tax receipts in the local community.
    - how the definition of philanthropy relates to the provision of tax receipts for special events.
    - benefits associated with special events that must be considered in calculating a charitable tax receipt.
- Given a profile of a donor and his/her gift, and a description of the organization soliciting the gift, one or more learners will—
    - Role-play a conversation in which the fundraiser explains the tax implications of the gift to the donor and answers the donor's questions.

- Evaluate the discussion, focusing on what was effective and what could be improved.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

- Given a description of an organization and its needs, and a profile of its donor prospects and volunteers, one or more learners will outline the information on tax implications of gifts that they would provide to the organization's volunteer solicitors.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

- Given the description of an organization and its special event, one or more learners will—
  - Calculate the charitable tax receipt for the event.
  - Prepare an explanation of the receipt and its amount for those who purchase a ticket for the event.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

- Given a donor's federal and state income tax brackets and a specific "gift of cash," one or more learners will calculate the donor's actual tax savings.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

- Discuss the tax benefits of charitable estate planning through life income gifts.

LEVEL OF PRACTICE

Advanced Level (10 or more years of experience)

1.4.4 Inform donors of the outcomes and community benefits that resulted from the use of their gifts.

1.4.4 Given a well-defined case for support for a particular program, the learner will be able to define to the donor specific outcomes and benefits resulting from the use of the donor's gift, in order to ensure appropriate stewardship.

ENABLING OBJECTIVES:

- Describe the key principles of the Donor Bill of Rights and the AFP Code of Ethics that apply to gift stewardship.

- Describe organization policies that should be developed to ensure a sound legal and ethical process for gift stewardship.
- Describe methods of donor communication that support gift stewardship, including, but not limited to:
  - Initial gift acknowledgement and acceptance.
  - Clarification of any gift restrictions and specific gift agreements.
  - Gift recognition.
  - Publicity.
  - Use of funds.
- Define appropriate roles for volunteers in the stewardship cycle.
- Identify training priorities for volunteers to ensure a successful communication to the donor about the use of the gift.
- Define the differences between a capital campaign, an endowment campaign, a special purpose campaign, and an annual campaign as they relate to gift stewardship.
- Describe the information that should be included in a formal stewardship report to a donor whose gift was made for a specific purpose.
- Explain the steps required to ensure ethical stewardship in the event that funds may not be used as intended or specified by the donor.
- Prepare a response to a complaint regarding the use of donor dollars for administrative costs or other indirect uses of funds.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - ethical considerations for gift stewardship.
  - organizational policies that will ensure a legal and ethical process for gift stewardship.
  - methods of donor communication that support give stewardship, including
    - initial gift acknowledgement and acceptance.
    - clarification of any gift restrictions and specific gift agreements.
    - gift recognition.
    - publicity.
    - use of funds.
  - roles for volunteers in the stewardship cycle.
  - how to prepare volunteers to communicate to a donor that the gift will and is being used appropriately.
  - differences between a capital campaign, an endowment campaign, a special purpose campaign, and an annual campaign as they relate to gift stewardship.

  - information that should be included in a formal stewardship report to a donor whose gift was made for a specific purpose.
  - how to ensure ethical stewardship in the event that funds may not be used as intended or specified by the donor.
  - how to respond to a complaint regarding the use of donor dollars for administrative costs or other indirect uses of funds.
- Given a description of an organization and its needs, a well-defined case for support for a particular program, and a description of a donor's gift, one or more learners will—
  - Identify the specific outcomes and benefits that will result from use of the donor's gift.
  - Decide methods for communicating this information to the donor that will demonstrate gift stewardship.
  - Describe how to communicate this information by means of each method selected.
- One or more learners will—
  - Brainstorm the ways their organizations steward gifts.
  - Categorize the modes of stewardship according to the types of campaigns involved.
  - Discuss the similarities and differences that appear.
- Using the AFP Code of Ethics and the Donor Bill of Rights, one or more learners will discuss the ethical issues that arise when funds are not used according to solicitation or donor intent.
- One or more learners will—
  - Identify five roles a volunteer should play in stewardship that do not compromise the confidential relationship a constituent should expect with a nonprofit organization.
  - Construct a set of guidelines/instructions for each volunteer role.
- One or more learners will—
  - Role-play responding to a donor's concerns regarding perceived excessive administrative costs.
  - Evaluate the explanation given, focusing on what was effective and what could be improved.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.4.5 Promote a culture that supports the use of appropriate levels of benefits and privileges for donors and volunteers.

1.4.5. Given a description of an organization and its constituents, the learner will be able to describe ways to strengthen the relationships between the organization's constituents and its donors and volunteers.

ENABLING OBJECTIVES:

- Describe possible approaches to the various constituents of the organization (volunteers, staff, beneficiaries, other stakeholders) to ensure understanding of, and respect for, the key roles of donors and volunteers in the success of the organization.
- Develop a process to ensure that this understanding is continuously instilled in all current and future organizational constituents.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - how to develop an understanding of, and respect for, the key roles of donors and volunteers in the success of an organization among its various constituents (e.g., volunteers, staff, beneficiaries, other stakeholders).
  - how to continuously foster understanding and respect for donors and volunteers among current and future organizational constituents.
- Given a description of an organization, its constituents, and its donors, one or more learners will—
  - Critique current organizational practices for strengthening the relationships between its constituents and its donors and volunteers.
  - Brainstorm strategies for strengthening constituents' relationships with donors.
  - Brainstorm strategies for making donors and volunteers feel that they are an integral part of the organization's programs.
  - Outline a training session that will help staff
    - understand the importance of donors and volunteers to the organization.
    - work with donors and volunteers.
  - Develop a plan for evaluating the strengths and weaknesses of the organization's relationship-building efforts with donors and volunteers.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.4.6 Strengthen relationships with donors and volunteers to promote long-term support.

1.4.6 Given a description of a particular organization and its donors and volunteers, the learner will be able to develop both internal and external techniques to maximize long-term support.

ENABLING OBJECTIVES:

- Define the critical relationship between volunteering and giving.
- Provide a rationale for the importance of financial investment in a donor and volunteer recognition and stewardship program.
- Develop techniques internal to the organization for maximizing long-term support by donors and volunteers.
- Develop techniques external to the organization for maximizing long-term support by donors and volunteers.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - the relationship between volunteering and giving.
  - rationale for financially investing in a donor and volunteer recognition and stewardship program.
  - internal techniques for maximizing long-term support by donors and volunteers.
  - external techniques for maximizing long-term support by donors and volunteers.
- Given a description of a particular organization and its donors and volunteers, one or more learners will—
  - Suggest internal techniques for maximizing long-term support by donors and volunteers.
  - Suggest external techniques for maximizing long-term support by donors and volunteers.
  - Justify the financial investment the proposed techniques require.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

Subrole 1.5 Gift Management

Policies, procedures, and practices for gift acceptance, acknowledgement, use and reporting of funds.

1.5.1 Develop gift processing policies and procedures that correspond to sound ethical and accounting principles and practices, and meet tax and other regulatory standards for all forms of contributions.

1.5.1 Given a policy and procedures for gift processing, the learner will be able to critique the policy and procedures in light of appropriate laws and regulations, the AFP Code of Ethics and Standards of Professional Practice, the Donor Bill of Rights, accounting guidelines, and industry best practices.

ENABLING OBJECTIVES:

- Describe the key principles of the Donor Bill of Rights and the AFP Code of Ethics that apply to gift processing.
- Identify basic accounting and tax principles and practices that apply to gifts and pledges.
- Explain any accounting requirements related to organizational spending that may impact gift acceptance and administration.
- Explain the legislative requirements in your community as they relate to the maintenance of gift history, receipt information, and other related practices.
- List sources of legal and ethical requirements for information maintained in a donor database for gift cultivation, renewal and upgrade.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - ethical considerations for gift processing.
  - basic accounting and tax principles and practices that apply to gifts and pledges.
  - accounting requirements related to organizational spending that may impact gift acceptance and administration.
  - applicable legislative and regulatory requirements related to the maintenance of gift history, receipt information, and other related practices.
  - legal and ethical requirements for information maintained in a donor database for gift cultivation, renewal and upgrade.
- Given an organization’s gift processing policies and procedures, one or more learners will critique the policies and procedures in light of—
  - appropriate laws and regulations.
  - ethical standards for the profession.

- accounting guidelines.
- industry best practices.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

- Given a local not-for-profit organization with an annual operating budget of $130,000, one or more learners will—
  - Draft a gift acceptance procedure for gifts-in-kind made to the organization.
  - Critique the procedure.
    - What is good about this draft?
    - What is missing from this draft?
    - What should be deleted from this draft?

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

- Using a copy of the AFP Code of Ethics, one or more learners will—
  - Design a hypothetical scenario that illustrates why it is important to appropriately account for a donor's restricted gift.
  - Discuss how the situation should have been handled.

LEVEL OF PRACTICE

Mid-Level (6-9 years of practice)

- Given a scenario in which a major gift donor is requesting special treatment in terms of the date the gift was made and when it was recorded, one or more learners will—
  - Discuss what legal and ethical principles are involved.
  - Decide how to respond to the donor.

LEVEL OF PRACTICE

Advanced Level (10 or more years of experience)

1.5.2 Ensure congruence between the fundraising department and business office regarding gift reporting and recording.

1.5.2 Given a policy and procedures for gift processing, the learner will be able to identify opportunities and challenges for coordination between the fundraising department and the business office.

ENABLING OBJECTIVES:

- Give examples of gift processes and policies in which the business office should play a key role.

- Identify the important links between the business office and fundraising department that will ensure accurate gift coding, management of contributed funds, and presentation of campaign and annual fundraising results and use of funds.
- Discuss the requirements and impact of the Donor Bill of Rights and the AFP Code of Ethics as they relate to any possible conflict with business policies and procedures for gift processing.
- Identify reporting needs for fund development.
- Distinguish those reporting needs for fund development that might be met through a donor database and those that require support of the business office.
- Describe the challenges in ensuring a blend of business office requirements and fundraising requirements as they relate to donation reporting and presentation of financial statements.
- Describe the role of the fundraising department in donor stewardship as it relates to potential concerns with the administration of gifts/funds by the business office.
- Discuss strategies for managing conflict between the needs and workload of the business office and the fundraising department.
- Develop an agenda for an orientation session for the business office on fundraising issues and the implications for gift processing.
- Provide examples of information and support that the fundraising department may be asked to provide to the treasurer and/or finance committee/department and to auditors.
- Describe the role of the CEO and CFO in benchmarking and fundraising performance analysis.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - examples of gift processes and policies in which the business office should play a key role.
  - how to coordinate the efforts of the business office and fundraising department in order to ensure accurate gift coding, management of contributed funds, and the presentation of campaign and annual fundraising results and use of funds.
  - requirements and impact of the Donor Bill of Rights and AFP Code of Ethics as they relate to any possible conflict with business policies and procedures for gift processing.
  - reporting needs for fund development, including those that might be met through a donor database and those that require support of a business office.
  - challenges in coordinating business and fundraising requirements as they relate to donation reporting and presentation of financial statements.
  - role of the fundraising department in donor stewardship as it relates to potential concerns with the administration of gifts/funds by the business office.

- strategies for managing conflict between the needs and workload of the business office and the fundraising department.
- how to plan an orientation session for a business office on fundraising issues and the implications for gift processing.
- information and support that a fundraising department may be asked to provide to a treasurer and/or finance committee/department and to auditors.
- the role of a CEO and CFO in benchmarking and fundraising performance analysis.

- Given a description of an organization's gift processing policies and procedures and a history of the relationship between the fundraising department and business office, one or more learners will—
  - Make suggestions for improving the coordination between the fundraising department and business office during gift processing.
  - Discuss ways to successfully implement the suggested improvements.
  - Plan an orientation session for the business office on fundraising issues and the implications for gift processing.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

- One or more learners will discuss how to meet the respective needs of a donor, a Chief Financial Officer, and a Chief Development Officer when a major gift is made.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

- One or more learners will—
  - Create a flow chart that shows the documentation of a pledge as it moves through the fundraising department and business office.
  - Document the pledge through completion of the final gift and fulfillment of all appropriate tax and accounting requirements.

LEVEL OF PRACTICE

Advanced Level (10 or more years of experience)

- One or more learners will—
  - Assume that you are the Chief Development Officer for your organization(s).
  - Role-play explaining the role of fundraising in the business department to a new Chief Financial Officer for your organization.
  - Evaluate the discussion, focusing on what was effective and what could be improved.

- Role-play explaining the role of fundraising in the business office to a new clerk in that office.
- Evaluate the discussion, focusing on what was effective and what could be improved.

LEVEL OF PRACTICE

Advanced Level (10 or more years of experience)

- One or more learners will create a policy that explains how a designated gift will be recorded and reported.
  - Include procedures for notifying the person responsible for spending the money.
  - Include procedures for business department reports to the fundraising department on how the money was spent.

LEVEL OF PRACTICE

Advanced Level (10 or more years of experience)

1.5.3 Receive and record all gifts.

1.5.3 Given a flow chart for gift intake, acknowledgement, acceptance, and recognition, the learner will be able to explain how the policies do or do not meet legal, ethical, security, accounting, and confidentiality requirements.

ENABLING OBJECTIVES:

- Identify strengths and weaknesses in the gift intake, acknowledge- ment, acceptance, and recognition policies as they relate to legal and ethical requirements, accounting requirements and practices, confidentiality, and security.
- Describe the necessary information for recording gifts received and any special provisions, restrictions, or other critical issues associated with a particular gift.
- Provide examples of ways to build donor development into the business processes of the gift cycle.
- Identify acceptable time lines for the various steps within the gift cycle.
- Describe the skills and experience required by staff and/or volunteers to accomplish each step in the gift cycle.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - legal, ethical, security, accounting, and confidentiality requirements for gift intake, acknowledgement, acceptance, and recognition.
  - necessary information to record for gifts received and any special provisions, restrictions, or other critical issues associated with a particular gift.

  - ways to build donor development into the business processes of the gift cycle (intake, acknowledgement, acceptance, and recognition).
  - acceptable time lines for each of the four stages in the gift cycle.
  - skills and experience that staff and/or volunteers need to accomplish gift intake, acknowledgement, acceptance, and recognition that meet legal, ethical, security, accounting, and confidentiality requirements.
- Given the flow chart for an organization's gift cycle, related policies, and a description of the organization, one or more learners will—
  - Review the flow chart and policies.
  - Explain how the policies for gift intake, acknowledgement, acceptance, and recognition do or do not meet legal, ethical, security, accounting, and confidentiality requirements.
  - Suggest ways for the organization to meet the requirements that are unmet.
  - Identify ways to build donor development into the business processes of the gift cycle.
  - Develop time lines for each of the four stages in the gift cycle that are appropriate to the organization.
  - Describe the skills and experience needed to staff the organization's gift cycle to ensure that legal, ethical, security, accounting, and confidentiality requirements are met.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.5.4 Manage the gift acceptance and acknowledgement process.

1.5.4 Given a description of an organization and its gift acceptance and acknowledgement process, the learner will be able to define appropriate methods for managing the process internally.

ENABLING OBJECTIVES:

- Define possible roles and responsibilities for fundraising, business, and executive leadership in managing the gift acceptance and acknowledgement process.
- Define appropriate information-sharing and reporting requirements among these various groups.
- Describe methods for informing key staff and volunteers so that gifts can be acknowledged, accepted, and recognized appropriately.
- Describe methods for informing the Board and appropriate Board committees about gifts accepted and acknowledged.
- Describe methods for resolving conflicts among the various segments of the organization over gift management.

- Define needed checks and balances in the management process.
- Define who will be responsible for communicating with donors when there are disputes or conflicts over gifts.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - possible roles and responsibilities for fundraising, business, and executive leadership in managing the gift acceptance and acknowledgement process.
  - appropriate information-sharing and reporting requirements among these various groups.
  - methods for informing key staff and volunteers so that gifts can be acknowledged, accepted, and recognized appropriately.
  - methods for informing the Board and appropriate Board committees about gifts accepted and acknowledged.
  - methods for resolving conflicts among the various segments of the organization over gift management.
  - needed checks and balances in the management process.
  - responsibilities for communicating with donors when there are disputes or conflicts over gifts.
- Given a description of an organization and its gift acceptance and acknowledgement process, one or more learners will—
  - Review any
    - roles and responsibilities for fundraising, business, and executive leadership in managing the gift acceptance and acknowledgement process.
    - information-sharing and reporting requirements among these various groups.
    - methods for informing key staff and volunteers so that gifts can be acknowledged, accepted, and recognized appropriately.
    - methods for informing the Board and appropriate Board committees about gifts accepted and acknowledged.
    - methods for resolving conflicts among the various segments of the organization over gift management.
    - checks and balances in the management process.
  - Suggest specific ways to improve management of the organization's gift acceptance and acknowledgement process.
  - Recommend who should be responsible for communicating with donors when there are disputes or conflicts over gifts—and explain why.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

1.5.5 Practice accountability by honoring confidentiality, adhering to donor intentions, observing organizational investment and spending policies, and informing donors about the use of their funds for community benefit.

1.5.5 Given policies and procedures for gift acceptance and administration, the learner will be able to explain how to receive, accept, record and acknowledge gifts, and track and report fulfillment of gift pledges in an accountable manner.

ENABLING OBJECTIVES:

- Describe key principles of the Donor Bill of Rights and the AFP Code of Ethics that apply to gift acceptance and administration.
- Describe key considerations in receiving, accepting, recording, acknowledging, tracking, and reporting pledges and pledge fulfillment in an accountable manner, including:
    - Timing of steps in gift acceptance and administration.
    - Gift types and restrictions.
    - Donor intent.
    - Beneficiaries.
    - Conveyance.
    - Notification of appropriate parties.
    - Confidentiality.
- Provide examples of how to determine the value of noncash gifts and report valuation to the donor.
- Describe potential issues or considerations involved in accepting a property gift against a pledge commitment.
- Explain the rationale for development of organizational investment/spending policies related to donated funds.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
    - ethical considerations that apply to accountability in gift acceptance and administration.
    - key considerations in receiving, accepting, recording, acknowledging, tracking, and reporting pledges and pledge fulfillment in an accountable manner.
    - how to determine the value of noncash gifts and report valuation to the donor.
    - potential issues or considerations involved in accepting a property gift against a pledge commitment.
    - organizational investment/spending policies related to donated funds, including their rationale.

- Given a description of an organization and its policies and procedures for gift acceptance and administration, one or more learners will—
    - Review how pledges and pledge fulfillments are received, accepted, recorded, acknowledged, tracked, and reported, checking for
        - confidentiality.
        - adherence to donor intentions.
        - existence of organizational investment and spending policies and conformity to them.
        - notification of donors about the use of their funds for community benefit.
    - Suggest specific ways to improve accountability in gift acceptance and administration.
- Given one or more examples of noncash gifts, one or more learners will—
    - Determine the value of a noncash gift in compliance with IRS regulations.
    - Describe how to report the gift's valuation to the donor.
    - Prepare an explanation of applicable IRS regulations for the donor.
- Given an example of accepting a property gift against a pledge commitment, one or more learners will—
    - Describe the benefits to the donor of a gift of property.
    - Prepare an explanation of the organization's policy and procedure on the treatment of a property gift.
    - Highlight tax restrictions related to the calculation of a charitable receipt for a gift of property.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

Role 2 Management: Plan, implement, and evaluate the processes that lead the organization to perform in an ethical and accountable manner, and to ensure public confidence and trust.

2.1 Develop an organizational culture that incorporates philanthropic values.

2.1 Given a profile of a particular organization, the learner will be able to:

- Extract characteristics from the profile that demonstrate or suggest the philanthropic values of the organization
- Explain why these characteristics are examples of philanthropic values
- Identify where essential philanthropic values are absent
- Describe how they may be developed.

ENABLING OBJECTIVES:

- Give examples of key indicators of an organization's commitment to philanthropic values.
- Identify and critique organizational policies that are contrary to a culture of philanthropic values.
- Describe the purposes of an organization's mission, vision, case for support, and case statement—and the differences among them.
- Explain the importance of mission and vision as they relate to competitors and public perception of duplication of effort.
- Describe the role of the CEO and other senior staff in fundraising.
- Present the Donor Bill of Rights and AFP Code of Ethics to a CFO new to the nonprofit sector.
- Describe the role of the professional fundraiser in the organizational leadership structure.
- Describe the importance and benefits of integrating the fundraising team with service providers and benefactors. Give examples of how to achieve this.
- Identify the key links between donors and beneficiaries in an organization's strategic plan and in integrating the fundraising and service delivery departments.
- Describe the role of volunteers with respect to an organization's philanthropic values.
- Explain the value of volunteers as a key indicator of an organization's commitment to philanthropic values.
- Describe an effective organizational position on legislative and political issues as they impact philanthropy and the charitable sector.
- Develop a fact-based, comprehensive summary of the impact of the economy on the organization's sector. Identify key indicators to look for in assessing the impact of the economy on the organization.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - essential philanthropic values for nonprofit organizations.
  - key indicators of an organization's commitment to philanthropic values.
  - organizational policies that are contrary to a culture of philanthropic values.
  - the purposes of an organization's mission, vision, case for support, and case statement—and the differences among them.
  - the importance of mission and vision as they relate to competitors and public perception of duplication of effort.
  - the role of the CEO and other senior staff in fundraising.
  - how to present the Donor Bill of Rights and AFP Code of Ethics to executives new to the nonprofit sector.
  - the role of a professional fundraiser in the organizational leadership structure.
  - importance and benefits of integrating the fundraising team with service providers and benefactors—and ways to do it.
  - key links between donors and beneficiaries in an organization's strategic plan and in integrating the fundraising and service delivery departments.
  - the role of volunteers with respect to an organization's philanthropic values.
  - the value of volunteers as a key indicator of an organization's commitment to philanthropic values.
  - what constitutes an effective organizational position on legislative and political issues as they impact philanthropy and the charitable sector.
  - how to develop a fact-based, comprehensive summary of the impact of the local/regional/national/global economies on the organization's sector—including key indicators to look for in assessing the impact of the economy on the organization.
- Given a profile of an organization, one or more learners will—
  - Extract characteristics from the profile that demonstrate or suggest the philanthropic values of the organization.
  - Explain why these characteristics are examples of philanthropic values.
  - Identify where essential philanthropic values are absent.
  - Describe how these essential philanthropic values may be developed.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

- One or more learners will—
  - Role-play presenting the Donor Bill of Rights and AFP Code of Ethics to an executive new to the nonprofit sector.
  - Evaluate the discussion, focusing on what was effective and what could be improved.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

- Given a description of an organization, its values, and its volunteers, one or more learners will prepare a training session for its volunteers on the organization's philanthropic values and the role of the volunteer in supporting them.

LEVEL OF PRACTICE

Entry-Level (1-5 years of experience)

- Given a description of an organization, one or more learners will identify ways to integrate its fundraising team with service providers and benefactors.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

- Given a description of an organization, including profiles of its donors and beneficiaries, one or more learners will—
  - Identify ways to link donors and beneficiaries to the organization's strategic plan.
  - Identify ways to use links between donors and beneficiaries to integrate the fundraising and service delivery departments.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

- Given a description of an organization and a specific legislative or political issue, one or more learners will develop an organizational position on the issue that describes the issue's impact on philanthropy and the charitable sector.

LEVEL OF PRACTICE

Advanced Level (10 or more years of experience)

- Given a description of an organization, one or more learners will—
  - Develop a fact-based, comprehensive summary of the impact of the local/regional/national/global economies on the organization's sector.

- Identify key indicators to look for in assessing the impact of the economy on the organization.

LEVEL OF PRACTICE

Advanced Level (10 or more years of experience)

2.2 Maintain awareness of internal and external environmental issues and events that can impact philanthropic support.

2.2 Given a description of a situation involving an international/national/state or provincial/local or institutional event, and a profile of an organization, the learner will be able to:

- Describe how the event may negatively or positively impact fundraising capabilities of the organization.
- Recommend methods to minimize the adverse impact of the event and/or maximize the benefit.

ENABLING OBJECTIVES:

- Describe the process of a comprehensive Strengths/Weaknesses/Opportunities/Threats (SWOT) analysis, and its:
    - Application to an organization overall.
    - Application in response to a specific societal/external event that may impact the organization.
- Describe the basics of media relations that are relevant to the fundraising department and donors.
- Explain the potential short-term and long-term impact on an organization of a negative news story or other negative media coverage.
- Explain the potential impact on an organization resulting from a negative news story about another organization or professional fundraiser.
- Describe methods for minimizing the impact on an organization from a news story that profiles excessive spending on the part of a similar organization.
- Describe techniques and methods for ensuring that staff, volunteers, and organizational leaders are prepared to respond (or not) to questions they receive from donors, media or the general public in response to an event.
- In an instance where a donor has complained to the media regarding the organization's decision to decline a certain gift, describe the direction that should be taken in clarifying the organization's rationale to the public, respecting confidentiality and the legal and ethical issues that might be involved.
- Take a negative situation regarding an organization and turn it into a positive account of the organization's work.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or small group discussion(s) on—
  - how to conduct a SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats).
    - for an organization as a whole.
    - in response to a specific event that could impact the organization and its fundraising capability either positively or negatively.
  - basics of media relations that are relevant to the fundraising department and donors.
  - potential short-term and long-term impact on an organization of a negative news story or other negative media coverage.
  - potential impact on an organization resulting from a negative news story about another organization or professional fundraiser.
  - methods for minimizing the impact on an organization from a news story that profiles excessive spending on the part of a similar organization.
  - techniques and methods for ensuring that staff, volunteers, and organizational leaders are prepared to respond (or not) to questions they receive from donors, media, or the general public in response to an event.
  - what to do when a donor complains to the media regarding the organization's decision to decline a certain gift.
  - how to take a negative situation regarding an organization and turn it into a positive account of the organization's work.
- Given a description of a situation involving an international/national/state or provincial/local or institutional event, and a profile of an organization, one or more learners will—
  - Conduct a SWOT analysis in relation to the event.
  - Describe how the event may negatively or positively impact fundraising capabilities of the organization.
  - Recommend methods to minimize any adverse impact of the event and/or maximize any benefit.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

- Given a description of an organization, profiles of its staff, volunteers, and leaders, and a news story related to the organization, one or more learners will develop a plan for preparing all three groups to respond or not to inquiries about the news story.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

- Given a description of an organization and a negative situation it is facing, one or more learners will strategize how to turn the situation into a positive account of the organization's work.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

2.3 Advocate for the integration of fund development policies into general institutional policies.

2.3 Given a set of institutional policy statements for a particular organization, the learner will be able to:

- Compare and contrast the policies based on the degree to which they are supportive or not of fundraising and development.
- Explain how the general institutional policies and procedures can be improved by integrating fundraising into them.

ENABLING OBJECTIVES:

- Analyze potential strengths and weaknesses of the organizational structure, internal communication, and planning as they relate to fundraising/ development practice.
- Assess the organization's position regarding ethical fundraising practices, pertinent laws and regulations, and the importance it places upon the rights of the donor.
- Create effective fundraising policies that can be integrated into the organization's institutional policies—to ensure the rights of the donor and provide for ethical fundraising practices.
- Develop a strategy to incorporate fundraising policies more effectively into the organization's institutional policies.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - how organizational structure, internal communications, and planning processes can support fundraising and development.
  - how an organization can integrate into its institutional policies ethical fundraising practices, compliance with pertinent laws and regulations, and the rights of donors.
- Given a description of an organization's structure, internal communications, planning processes, and institutional policies, one or more learners will—
  - Identify the organizational elements that are supportive of fundraising/ development.
  - Identify the organizational elements that are *not* supportive of fundraising/development.

- Develop a set of recommended changes that are supportive of fundraising/development.
- Develop a plan, with realistic time lines, for implementing the proposed changes.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

2.4 Ensure that the organization's strategic planning process includes the interests and rights of donors and volunteers.

2.4 Given a scenario for a particular organization and its structure, the learner will be able to explain the rationale for including the interests and rights of donors and volunteers in the organization's strategic planning process.

ENABLING OBJECTIVES:

- Define the essential elements of the interests and rights of donors and volunteers to incorporate into the organization's strategic planning process.
- Explain the importance of involving donors and volunteers in the organization's strategic planning process, emphasizing the benefits to the organization.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - essential elements of the interests and rights of donors and volunteers to incorporate into an organization's strategic planning process.
  - the importance of involving donors, volunteers, and fundraising in the strategic planning process, including the organizational benefits.
  - ways to involve donors, volunteers, and fundraising in the strategic planning process.
- Given a description of an organization, of its leaders, of its donors, and of its volunteers, one or more learners will—
  - Develop a rationale for including the interests and rights of donors and volunteers in the organization's strategic planning process.
  - Identify ways to include specific interests and rights of donors and volunteers in the planning process.
  - Identify at least three arguments that could be made against including *fundraising* in the strategic planning process.
  - Develop a rebuttal for each argument anticipated.
  - Role-play a meeting with organizational decision-makers to advocate including the interests and rights of donors and volunteers, as well as fundraising, in the organization's strategic planning process.

- Evaluate the discussion, focusing on what was effective and what could be improved.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

2.5 Develop a fundraising plan that supports the objectives of the organization's strategic plan.

2.5 Given the key objectives of an organization's strategic plan, the learner will be able to develop a fundraising plan that supports the objectives.

ENABLING OBJECTIVES:

- Develop a specific fundraising plan that:
  - Seeks to generate gift support to meet the organization's objectives.
  - Derives directly from the organization's mission and strategic plan and the needs of those it serves.
  - Considers budgetary and resource limitations.
  - Follows appropriate ethical practices ensuring the rights of the donor.
- Analyze the potential effectiveness of the fundraising plan in relation to the stated needs in the organization's strategic plan, given budgetary and resource limitations.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - laws, regulations, and possible internal policies that may impact an organization's fundraising plan.
  - possible ethical concerns that could arise during the development of a fundraising plan and how to respond to them.
  - how to develop a fundraising plan that
    - supports the organization's strategic plan objectives.
    - derives directly from the organization's mission and strategic plan and the needs of those it serves.
    - considers budgetary and resource limitations.
    - follows appropriate ethical practices ensuring the rights of the donor.
  - how to evaluate the potential effectiveness of a fundraising plan in relation to the stated needs in the organization's strategic plan, and budgetary and resource limitations.

- Given an organization's mission and strategic plan objectives, its fundraising plan, its budget, and a description of its resources, one or more learners will analyze the potential effectiveness of the fundraising plan in relation to the stated needs in the organization's strategic plan, given its budgetary and resource limitations.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

- Given an organization's mission and strategic plan objectives, its budget, and a description of its resources, one or more learners will develop a specific fundraising plan for the organization that—
  - Seeks to generate gift support to meet the organization's objectives.
  - Derives directly from the organization's mission and strategic plan and the needs of those it serves.
  - Considers budgetary and resource limitations.
  - Follows appropriate ethical practices ensuring the rights of the donor.

LEVEL OF PRACTICE

Advanced Level (10 or more years of experience)

2.6 Engage senior executive leadership in fundraising planning and implementation.

2.6 Given a description of how an organization's senior executive leadership is engaged in fundraising planning and implementation, the learner will be able to describe the ways in which senior leaders contribute to or detract from the success of fundraising.

ENABLING OBJECTIVES:

- Assess the role of senior executive leadership with regard to support for, and involvement in, fundraising planning and implementation.
- Analyze the communication patterns related to fundraising among the organization's senior executive leadership and volunteer leadership.
- Assess the effectiveness of the chief fundraiser in promoting communication and support for fundraising planning and implementation, including relations with other key staff and volunteer leadership.
- Develop recommendations to strengthen and improve appropriate involvement of senior executive leadership in the planning and implementation of effective fundraising.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - role of the chief fundraiser in promoting communication and support for fundraising planning and implementation, including relations with other key staff and volunteer leadership.

- ethical considerations that affect the chief fundraiser's role in involving senior executive leadership in fundraising planning and implementation.
- role of senior executive leadership in supporting and participating in fundraising planning and implementation.
- what constitutes effective communication among senior executive leadership and volunteer leadership during fundraising planning and implementation.

▪ Given a description of how an organization's senior executive leadership is engaged in fundraising planning and implementation, one or more learners will—

- Describe the ways in which senior leaders contribute to or detract from the success of fundraising.
- Discuss ways the chief fundraiser can work to eliminate the "distracting" behaviors.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

▪ One or more learners will—

- Brainstorm situations where they have seen positive senior executive leadership involvement in fundraising planning and implementation.
- Discuss the benefits of the positive examples.
- Brainstorm situations where they have seen negative consequences of senior executive leadership involvement in fundraising planning and implementation.
- Discuss how the negative situations could be turned into positive ones.

LEVEL OF PRACTICE

Mid-level (6-9 years of experience)

2.7 Coordinate the fundraising departmental budget with the organization's operational budgeting process.

2.7 Given an organization's budgeting practices and budget development cycle, including departmental roles and responsibilities, the learner will be able to analyze the strengths and weaknesses of the operational budgeting processes and cycles in relation to the needs of the fundraising budgeting processes and cycles.

ENABLING OBJECTIVES:

▪ Define roles and responsibilities within the fundraising area for data input and monitoring of gifts, other income, and expenses.

▪ Explain how to manage fundraising budget preparation and ongoing budget monitoring in relation to other fundraising needs.

▪ Analyze the strengths and weaknesses of the operational budgeting processes and cycles in relation to the needs of the fundraising budgeting processes and cycles.

- Describe examples where operational budgeting cycles may conflict with major fundraising activities or plans.
- Describe examples of how long-term campaigns can impact budgets and budget cycles for fundraising and for operations in general.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - ethical and regulatory standards for gift accounting.
  - fundraising roles and responsibilities for data input and for monitoring of gifts, other income, and expenses.
  - how to manage preparation of a fundraising budget.
  - how to monitor a fundraising budget in relation to other fundraising needs.
  - potential strengths and weaknesses of operational budget processes and cycles in relation to the needs of fundraising budget processes and cycles.
  - ways in which an operational budget cycle may conflict with major fundraising activities or plans—and strategies for overcoming these conflicts.
  - ways in which long-term campaigns can impact budgets and budget cycles for fundraising and operations in general.
- Given a description of an organization's budgeting practices and budget development cycle, including departmental roles and responsibilities, one or more learners will—
  - Analyze the strengths and weaknesses of the operational budgetary processes and cycles in relation to the needs of the fundraising budgetary processes and cycles.
  - Recommend changes that will benefit the fundraising budgetary processes and cycles without detriment to the operational budgetary processes and cycles.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)
Advanced Level (10 or more years of experience)

- One or more learners will—
  - Discuss their organization's gift accounting practices.
  - Discuss the impact of those practices on both the operational and fundraising budgetary processes and cycles.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)
Advanced Level (10 or more years of experience)

- One or more learners will discuss a situation where a donor makes a gift on January 20th.
    - How should the chief fundraiser handle this within the budget?
    - How should the chief fundraiser handle this with the accounting/finance department?
    - How should the chief fundraiser handle this with the donor?

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)
Advanced Level (10 or more years of experience)

2.8 Develop reliable projections of gift revenue to ensure accurate organizational budgeting.

2.8 Given an organization's annual fundraising revenue and expenses, the learner will be able to extrapolate projections for potential gift revenue in all fundraising efforts for a defined period.

ENABLING OBJECTIVES:

- Define key considerations in determining donor gift projections.
- Explain the costs and benefits of various fundraising methods.
- Define differences in resources needed for various fundraising methods.
- Develop projections for an organization's total potential gift revenue for a defined period.
- Define the conditions under which an organization might not reach its gift projections, including "worst case" scenarios and possible alternative plans.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
    - key considerations in determining donor gift projections.
    - costs and benefits of various fundraising methods.
    - differences in resources needed for various fundraising methods.
    - how to develop projections for an organization's total potential gift revenue for a defined period.
    - conditions under which an organization might not reach its gift projections, including possible "worst case" scenarios, and how to develop possible alternative plans.

- Given a description of an organization that includes information on its three previous annual campaigns, a constituent profile, a donor profile, and a case statement, one or more learners will—
    - Identify the key considerations that will affect donor gift projections—including the costs and benefits of the fundraising methods.
    - Develop a projection of the organization's total potential gift revenue for the coming year.
    - Identify the conditions under which the organization might not reach the projection.
    - Develop some alternative plans to use if the organization doesn't meet the projection.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

2.9 Develop effective volunteer leadership and service in support of philanthropic goals.

2.9 Given an organizational description, a fundraising plan, and department budget, the learner will be able to develop an appropriate model for volunteer recruitment, retention, training and evaluation suitable to the organization's philanthropic goals.

ENABLING OBJECTIVES:

- Explain how using volunteers will help achieve organizational and fundraising objectives.
- Identify possible areas where volunteers can benefit the organization.
- Define key considerations in creating specific volunteer fundraising position descriptions.
- Describe characteristics of an ideal fundraising volunteer.
- Describe methods for recruiting volunteers for fundraising.
- Describe a model volunteer orientation program.
- Describe methods for retaining volunteers for fundraising.
- Describe methods for evaluating individual volunteers.
- Describe methods for evaluating a volunteer program's effectiveness.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
    - how the use of volunteers will help achieve organizational and fundraising objectives.

  - possible areas where volunteers can benefit the organization.
  - how to develop volunteer fundraising position descriptions that reflect the specific skills, knowledge, and attitudes that the position requires.
  - characteristics of an ideal fundraising volunteer.
  - methods for recruiting volunteers for fundraising.
  - models for volunteer orientation programs.
  - methods for retaining volunteers for fundraising.
  - methods for evaluating individual volunteers.
  - methods for evaluating a volunteer program's effectiveness.
- Given a description of an organization and its philanthropic goals, its fundraising plan, and its fundraising budget, one or more learners will—
  - Decide the number and types or categories of volunteers that will be needed to help achieve the organization's fundraising objectives.
  - Explain how the use of volunteers in each category can benefit the organization.
  - Identify the key considerations for specific volunteer fundraising position descriptions for the organization.
  - Develop volunteer position descriptions for each category.
  - Describe the characteristics of the ideal volunteer fundraiser for this organization.
  - Recommend methods for recruiting fundraising volunteers that are appropriate for the organization.
  - Outline a volunteer orientation program appropriate for the organization and its fundraising activities.
  - Recommend ways to retain fundraising volunteers that are appropriate for the organization.
  - Recommend ways to evaluate individual fundraising volunteers that are appropriate for the organization.
  - Recommend a method for evaluating the effectiveness of the organization's volunteer program that is appropriate for the organization.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

2.10 Design and implement fundraising programs that meet the objectives of the fundraising plan.

2.10 Given a detailed description of an organization, including its mission, programs and services, organization, fundraising plan, long-term fundraising goals and shorter-term fundraising objectives, the learner will be able to develop fundraising programs and strategies designed to achieve the fundraising objectives.

ENABLING OBJECTIVES:

- Describe how annual giving, major gifts, planned giving, capital and special campaigns, and other fundraising programs may be used to achieve fundraising objectives.
- Describe how cultivation, personal solicitation, direct mail, special appeals, the Internet, recognition programs, and other strategies may be used to achieve fundraising objectives.
- Describe the roles of fundraising staff and other organizational staff in the fundraising process.
- Identify the roles Board members can play in the fundraising process.
- Identify the roles for other volunteers in the fundraising process.
- Describe benchmarks for measuring progress towards fundraising objectives.
- Describe possible events and actions that may hinder achievement of fundraising objectives.
- Identify methods to overcome these hindrances to achieving fundraising objectives.
- Identify possible reporting methods and the content of progress reports.
- Describe ways to recognize those helping to achieve fundraising objectives.
- Design fundraising programs and strategies to achieve a particular set of fundraising objectives.

SUGGESTED LEARNING ACTIVITY:

- Lecturette or selected readings or group discussion(s) on—
  - how to use annual giving, major gifts, planned giving, capital and special campaigns, and other fundraising programs to achieve fundraising objectives.
  - how to use cultivation, personal solicitation, direct mail, special appeals, the Internet, recognition programs, and other strategies to achieve fundraising objectives.
  - roles of fundraising staff and other organizational staff in the fundraising process.
  - roles of Board members in the fundraising process.
  - roles for other volunteers in the fundraising process.

- benchmarks for measuring progress towards fundraising objectives.
- possible events and actions that may hinder achievement of fundraising objectives.
- methods for overcoming identified hindrances to achieving fundraising objectives.
- possible reporting methods and the content of progress reports.
- forms of recognition for those helping to achieve fundraising objectives.
- how to design fundraising programs and strategies to achieve a particular set of fundraising objectives.

▪ Given a detailed description of an organization, including its mission, programs and services, staff and volunteers, fundraising plan, long-term fundraising goals and shorter-term fundraising objectives, one or more learners will prepare an integrated fundraising plan in outline form for the organization. This plan will include a description of—

- How each of the primary fundraising programs and strategies will be used to achieve the short-term objectives and long-term goals.
- The roles and responsibilities of fundraising staff, other staff, Board members, and other volunteers in implementing the plan.
- Benchmarks for measuring progress towards achieving fundraising goals and objectives.
- Possible barriers to success and methods to overcome them.
- Reporting methods and the content of progress reports.
- Donor and volunteer recognition programs.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

2.11 Ensure accountability in managing the department fundraising plan.

2.11 Given a departmental budget and fundraising plan, the learner will be able to demonstrate ways to manage budget, information, personnel, and contracts (vendors and grants) to ensure proper maintenance and accountability.

ENABLING OBJECTIVES:

▪ Describe how compliance with appropriate elements in the AFP Code of Ethics will be incorporated into the accountability and management processes.

▪ Describe the extent to which legal review may be incorporated into execution of the fundraising plan to ensure compliance with federal, state/provincial, regional and local laws, regulations and policies.

- Describe methods to ensure the confidentiality of donor information and records consistent with the Donor Bill of Rights, legal requirements, and organizational requirements.
- Describe methods to safeguard budget information in the execution of the fundraising plan.
- Describe methods to ensure against the loss of information and budget and donor records necessary to maintaining accountability of the department.
- Describe methods to ensure accountability of expenditures within the approved budget for the fundraising plan that are consistent with organizational and legal requirements.
- Describe how fundraising-related expenditures may be segregated from general departmental expenditures in the execution of the fundraising plan.
- Identify individuals within the department with overall and specific responsibility for establishing and maintaining controls over the departmental fundraising budget.
- Identify individuals within the department who will have authority to solicit, negotiate and approve contracts or agreements with vendors/grantors and describe the extent of their authority (e.g., general, specific, sole authority).
- Describe any training necessary to ensure personnel are familiar with their individual responsibilities in executing the fundraising plan and their role in maintaining accountability of the department budget.
- Describe reports and the frequency of reports that will be required to reflect execution of the fundraising plan within the departmental budget (e.g., balance sheet, expenditures, cash flow).

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - how compliance with appropriate elements in the AFP Code of Ethics can be incorporated into the accountability and management processes.
  - how legal review can be incorporated into execution of a fundraising plan to ensure compliance with government laws, regulations, and policies.
  - methods to ensure the confidentiality of donor information and records that are consistent with the Donor Bill of Rights, legal requirements, and organizational requirements.
  - methods to safeguard budget information during implementation of a fundraising plan.
  - methods to ensure against the loss of information and budget and donor records needed to maintain departmental accountability.
  - methods to ensure accountability of expenditures within the approved budget for a fundraising plan that are consistent with organizational and legal requirements.

  - how to segregate fundraising-related expenditures from general departmental expenditures when implementing a fundraising plan.
  - roles and responsibilities of departmental staff members regarding accountability, budget controls, exercise of authority, and reporting.
  - departmental staff training on assigned responsibilities, including budget administration, information management, and grants and contracts administration.
  - the types and frequency of reports needed to track implementation of a departmental fundraising plan.

- Given a departmental policies and procedures manual and fundraising plan, as well as a description of departmental staffing, one or more learners will develop recommendations in the following areas in order to ensure proper maintenance and accountability for the budget and fundraising plan:
  - compliance with appropriate elements in the AFP Code of Ethics.
  - legal reviews to ensure compliance with government laws, regulations, and policies.
  - methods to ensure confidentiality of donor information and records.
  - methods to safeguard budget information during implementation of the fundraising plan.
  - methods to ensure against the loss of information and budge and donor records needed to maintain departmental accountability.
  - methods to ensure accountability of expenditures within the approved budget for a fundraising plan.
  - ways to segregate fundraising-related expenditures from general departmental expenditures.
  - roles and responsibilities for departmental staff members regarding accountability, budget controls, exercise of authority, and reporting
  - training for staff members on their assigned responsibilities
  - types and frequency of reports for tracking implementation of the fundraising plan

LEVEL OF PRACTICE

Mid-level (5 -7 years of experience)

2.12 Evaluate the effectiveness of fundraising programs in the context of a fundraising plan.

2.12 Given a fundraising plan for a particular organization which describes goals and activities (e.g. direct mail, telethon) for each campaign (e.g., annual giving, major gifts) within the fundraising plan and the results achieved by each campaign, the learner will be able to evaluate the effectiveness of the individual campaigns and the overall fundraising effort in relation to the objectives of the fundraising plan.

ENABLING OBJECTIVES:

- Describe appropriate analytical methods for assessing the effectiveness of individual campaigns in relation to the objectives of a fundraising plan.
- Describe benchmarks for measuring progress towards the fundraising goals.
- Identify possible reporting methods and the content of progress reports.
- Analyze whether the plan achieved its objectives within the proscribed timeline and using the proscribed resources.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - appropriate analytical methods for assessing the effectiveness of individual campaigns in relation to plan objectives examples: response rates, cost per dollar raised.
  - ways to benchmark progress towards fundraising goals.
  - possible reporting methods and content for progress reports.
  - how to determine whether a plan achieved its objectives within the given time line and with the assigned resources.
- Given examples of individual campaigns and their results, one or more learners will apply various analytical measures to determine the effectiveness of the campaigns.

LEVEL OF PRACTICE:

Entry Level (1-5 years)

- Given a fundraising plan for a particular organization which describes the goals and activities for each campaign within the plan, one or more learners will—
  - Establish benchmarks for measuring progress towards the fundraising goals.
  - Select reporting methods and justify their selection.
  - Decide what information progress reports should present.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)
Mid-Level (6-9 years of experience)

- Given a fundraising plan for a particular organization which describes the goals and activities for each campaign within the plan, and the results achieved by each campaign, one or more learners will evaluate the effectiveness of the individual campaigns and the overall fundraising effort in relation to plan objectives, including—
  - Applying the appropriate analytical methods.
  - Determining whether the plan achieved its objectives within the assigned time line and with the assigned resources.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)
Mid-level (6-9 years of experience)

2.13 Ensure accountability for fundraising costs in keeping with industry standards.

2.13 Given a description of an organization's fundraising program and its costs, the learner will be able to benchmark the organization's fundraising costs against industry standards.

ENABLING OBJECTIVES:

- Describe the cost elements of an organization's fundraising program, e.g., personnel, materials, and services.
- Identify sources of information that may be used as benchmarks in order to compare the organization's fundraising program and its related costs to those of similar organizations.
- Calculate the return on investment (ROI) for a campaign or activity.
- Compare fundraising costs by element or campaign with similar costs of like organizations representative of the industry.
- Explain variances between fundraising costs for specific elements or campaigns associated with the fundraising program(s) of the organization and the benchmark costs of programs from similar organizations.
- Describe the impact of pertinent federal, state/provincial, regional or local laws, statutes, regulations or policies as they relate to comparisons with the benchmark organization.
- Identify other factors that may have impacted the organization's fundraising costs.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - cost elements of a fundraising campaign.
  - sources of information on industry standards for fundraising costs.
  - how to prepare cost analysis worksheets for activities or campaigns.
  - how to calculate the return on investment (ROI) for an activity or campaign.

- how to compare fundraising costs by element or campaign.
- reasons for variances between fundraising costs for an organization and the benchmark costs of programs from similar organizations.
- impact of government laws, statutes, regulations, or policies on comparisons with a benchmark organization.
- other factors that can impact an organization's fundraising costs.

- Given a description of an organization's fundraising program and its costs, as well as sources of information that may be used as benchmarks, one or more learners will—
  - Identify the cost elements of the organization's fundraising program to benchmark.
  - Compare fundraising costs by cost element or campaign with similar costs of like organizations.
  - Explain any variances between costs for the organization and the benchmark costs of similar organizations.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)
Mid-Level (6-9 years of experience)

- Given a description of an organization's fundraising program and its costs, one or more learners will complete a cost analysis worksheet for a donor acquisition direct mail activity, a special event, and a local-area volunteer solicitation visit.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)
Mid-Level (6-9 years of experience)

- Given the cost analysis worksheets for the direct mail activity, the special event, and the volunteer solicitation visit, as well as a rate of return of .9% for the direct mail donor acquisition, attendance figures for the special event, and the results of the volunteer solicitation visit, one or more learners will compute the return on investment (ROI) for each activity.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)
Mid-Level (6-9 years of experience)

- Holding everything else from the previous two activities constant, one or more learners will recalculate the return on investment (ROI) for the local-area volunteer solicitation visits, assuming that five were conducted, but only one was successful.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)
Mid-Level (6-9 years of experience)

2.14 Recruit, retain and develop fundraising staff.

2.14 Given a fundraising plan for an organization and a description of the size, experience and knowledge of its fundraising staff, the learner will be able to describe actions to be taken to recruit, retain and develop fundraising staff.

ENABLING OBJECTIVES:

- Describe specific roles and responsibilities of fundraising staff for a particular fundraising plan.
- Describe how to
    - Evaluate the size, experience and knowledge of the fundraising staff against the requirements of the fundraising plan.
    - Identify any areas where additional staff or training is needed.
    - Explain why any additional staff may be needed, and the programs for which they may be needed.
- Define the working relationships among staff for implementing the fundraising plan.
- Define staff reporting relationships.
- Identify the key components for a process to evaluate fundraising staff, including components that apply to all fundraising staff, as well as components for specific staff positions.
- Identify any additional training that may be required for existing staff and for whom.
- Establish a time line for the development and/or training of existing staff in order to implement the organization's fundraising plan.
- Describe methods for recruiting additional staff to specific positions.
- Establish a time line for the recruitment of any additional staff which may be needed to implement the organization's fundraising plan.
- Describe outside resources to use for ongoing staff development.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
    - different staff roles and responsibilities for implementing a fundraising plan.
    - how to evaluate the size, experience, and knowledge of available staff against the requirements of a fundraising plan and identify any areas where additional staff or training are needed.
    - how to make an argument for additional staff members.
    - appropriate working relationships among staff members for implementing a fundraising plan.

- appropriate staff reporting relationships for implementing a plan.
- how to evaluate fundraising staff members.
- how to identify any additional training that existing staff might need to implement a plan.
- how to establish a time line for additional training or development.
- how to recruit additional staff to specific positions.
- how to establish a time line for recruitment of additional staff.
- outside resources to use for ongoing staff development.

▪ Given a description of an organization and its fundraising plan, and a description of the size, experience, and knowledge of its fundraising staff, one or more learners will—

- Develop job descriptions that detail the specific roles and responsibilities needed to implement the plan, including working and reporting relationships.
- Evaluate the existing staff against the requirements of the plan.
- Develop a suggested procedure for hiring additional fundraising personnel needed to implement the plan.
- Develop a time line for recruiting additional staff that takes into account circumstances which may impede an immediate hire (for example, what will be done in the meantime).
- Develop a time line for training current and new staff to implement the plan.
- Identify key components of an evaluation program for fundraising staff that should appear in the organization's Employee Manual, noting those that may differ from evaluation of non-fundraising employees.
- Develop a departmental policy on the professional development of fundraising staff members, including the use of outside resources.

LEVEL OF PRACTICE

Advanced Level (10 or more years of experience)

▪ Given the description of an organization, its fundraising plan, year-end results for the plan, and a description of the size, experience, and knowledge of its fundraising staff, one or more learners will—

- Review the year-end results (net income) of the development effortagainst the established goals of the plan.
- Note in which areas fundraising goals have been met or exceeded.
- Use this information to evaluate the staff assigned to fundraising activities and campaigns that succeeded and those that failed to meet goals.
- Develop recommendations for new and/or additional staff members with the necessary specific fundraising skills to achieve currently unmet goals.

- Prepare a presentation to decision-makers that
  - Explains why additional staff members are needed.
  - Describes the programs for which they are needed.
  - Describes the results (net income) expected by completing these hires.

LEVEL OF PRACTICE

Advanced Level (10 or more years of experience)

2.15 Develop a plan for crisis management.

2.15 Given a description of a crisis situation for a particular organization, and a description of the organization's leadership and experience in crisis management, the learner will be able to create an action plan for managing the crisis.

ENABLING OBJECTIVES:

- Describe an overall crisis management plan and the specific steps that should be taken by the organization to respond to and manage a crisis.
- Explain crisis management techniques and the key considerations that should be included in a crisis management plan, including impact on various audiences or stakeholders and appropriate responses.
- Explain the importance of internal relations and teamwork when faced with an institutional or public relations crisis.
- Explain how to prepare the organization's leadership to implement a specific crisis action plan.
- Identify the elements of a crisis that affect the organization's various audiences or stakeholders.
- Describe key considerations in selecting an official spokesperson to respond to the audiences or stakeholders.
- Explain why a situation presents a crisis for the organization and/or its stakeholders.
- Describe methods for informing the organization's internal audience of the crisis situation and engaging its support in the organization's response.
- Describe possible roles and responsibilities for Board members and staff members in responding to the crisis.
- Describe the primary role(s) of the fundraising team in responding to a crisis.
- Describe how the organization can address the concerns of the general public, donors and prospective donors, and board members in a particular situation.
- Describe the organization's policy for responding to news media queries, requests for interviews, and camera or video photo opportunities.
- Contrast the various news media involved and explain how the organization must take their differences into account when responding to them.

- Contrast the pros and cons of restricting media access to the organization and its leadership.
- Describe how to evaluate the success of the crisis action plan.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - elements of a crisis management plan.
  - steps in responding to and managing a crisis for an organization.
  - crisis management techniques.
  - importance of internal relationships and teamwork for a crisis situation.
  - how to prepare organizational leadership to implement a specific crisis action plan.
  - how to identify the elements of a crisis that affect an organization's various audiences and stakeholders.
  - key considerations in selecting an official spokesperson for a crisis situation.
  - how to explain why a situation presents a crisis for an organization and/or its stakeholders.
  - methods for informing the organization's internal audience of a crisis situation and engaging its support in the organization's response.
  - possible roles and responsibilities for Board members and staff members in responding to a crisis.
  - primary roles of a fundraising team in responding to a crisis.
  - how to address the concerns of the general public, donors and prospective donors, and board members in a particular situation.
  - policies for responding to news media queries, requests for interviews, and camera or video photo opportunities.
  - differences among news media and how to take them into account when responding to the media.
  - pros and cons of restricting media access to the organization and its leadership.
  - how to evaluate the success of a specific crisis action plan.
- One or more learners will view an off-the-shelf video program on crisis management that speaks to the needs of a nonprofit organization.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)
Advanced Level (10 or more years of experience)

- One or more learners will attend a presentation by a panel of media experts who specialize in crisis management public relations involving both print and electronic media, and public trust and ethics issues.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)
Advanced Level (10 or more years of experience)

- Given a description of a crisis within an organization, as well as a description of staff members, volunteer leaders, and beneficiaries, one or more learners will—
  - Develop an action plan for responding to the crisis.
  - Identify the elements of the crisis that will affect the organization's various internal audiences and stakeholders.
  - Develop a message about the situation to communicate to various internal audiences, including staff, board members, and, possibly, beneficiaries.
  - Decide how to inform various internal audiences and engage their support in responding to the crisis, and who should do the informing.
  - Role-play informing various internal audiences and engaging their support.
  - Evaluate each role-play, focusing on what was effective and what could be improved.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)
Advanced Level (10 or more years of experience)

- Given a description of a crisis within an organization, as well as a description of key staff members and volunteer leaders, one or more learners will—
  - Develop a media relations and crisis management policy that identifies
    - how media requests are to be handled.
    - by whom.
    - what notification is required.
    - who can authorize media requests.
    - how media contacts will be tracked and evaluated.
  - Prepare a "crisis message" that relates to the crisis itself and ties it to the agency's mission.
  - Prepare a written statement for the media.
  - Decide who should be the organization's key spokesperson and give reasons why.

- Prepare talking points for the spokesperson to use with
    - donors and potential donors.
    - media and the general public.
- Evaluate the written statement for the media and the talking points, especially as they relate to public confidence and ethics.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)
Advanced Level (10 or more years of experience)

Role 3 Advancing Philanthropy: Advocate for the essential role of philanthropy in a civil society.

3.1 Conduct oneself in a professional and ethical manner.

3.1 Given an ethical situation, the learner will be able to apply the AFP Code of Ethical Principles and Standards of Professional Practice, the Donor Bill of Rights, and other appropriate ethical and legal principles in the context of encouraging the role of philanthropy in a civil society.

ENABLING OBJECTIVES:

- Describe the ideal characteristics of the professional fundraiser.
- Describe how the AFP Code of Ethical Principles and Standards of Professional Practice, the Donor Bill of Rights, and other appropriate ethical and legal principles apply to a particular situation.
- Develop a response to the situation, based on the AFP Code of Ethical Principles and Standards of Professional Practice, the Donor Bill of Rights, and other appropriate ethical and legal principles.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on –
  - ideal characteristics of the professional fundraiser
  - how to apply the AFP Code of Ethical Principles and Standards of Professional Practice, the Donor Bill of Rights, and other appropriate ethical and legal principles to a particular situation in the context of encouraging the role of philanthropy in a civil society.

- Given an ethical situation, one or more learners will apply appropriate ethical and legal principles in the context of encouraging the role of philanthropy in a civil society.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

One or more learners will –

- Develop 3-5 common ethical challenges.
- Identify the ethical and legal principles involved.
- Discuss how to respond to the challenges in the context of encouraging the role of philanthropy in a civil society.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

3.2	Create an understanding and acceptance of philanthropy as integral to successful operation of a charitable (nonprofit) organization.
	3.2 Given a successful campaign scenario, the learner will be able to develop ways to communicate and celebrate the importance of philanthropy.

ENABLING OBJECTIVES:

- Describe the scope and magnitude of philanthropy nationally and internationally.
- Develop a list of print resources that communicate and celebrate the importance of philanthropy that could be made available to volunteers, donors, and staff.
- Describe recognition programs and events that could be used to communicate and celebrate the importance of philanthropy to the organization, its stakeholders, and the wider public.
- Describe ways to use completion of a campaign to promote the value of philanthropy to the media.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - the scope and magnitude of philanthropy nationally and internationally.
  - print resources that communicate and celebrate the importance of philanthropy that could be made available to volunteers, donors, and staff.
  - different types of recognition programs and events that could be used to communicate and celebrate the importance of philanthropy to the organization, its stakeholders, and the wider public.
  - how to use completion of a successful campaign to promote the value of philanthropy to the media.
- Given a particular national or international charitable organization, one or more learners will prepare a presentation on the history of that organization—including where it operates, and major accomplishments it has achieved. The presentation should communicate the scope of philanthropy and the role that it plays in enhancing the quality of life.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

- One or more learners will research libraries, the Internet, databases, and other resources to develop a list of sources that focus on the importance of philanthropy.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

- Given a description of an organization and its constituents, as well as the Donor Bill of Rights, one or more learners will—
  - Construct a recognition program designed to educate the organization's public about the organization and the importance of philanthropy.
  - Explain how the recognition program will encourage philanthropy and communicate to the public how philanthropy affects this organization in particular.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

- Given a successful campaign, one or more learners will discuss the use of popular media (especially TV and newspapers) as a way to disseminate information about the success of the campaign.
  - Brainstorm how to encourage media interest in the campaign.
  - Brainstorm how to present the organization and its activities in a positive way.
  - Brainstorm how to achieve the first two steps in ways compatible with limited media space.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

3.3 Collaborate internationally by fostering reciprocal relationships with others who share an interest in the advocacy of philanthropy.

3.3 Given AFP's Globalization Task Force Report, the learner will be able to identify international opportunities to foster reciprocal relationships with others who share an interest in the advocacy of philanthropy.

ENABLING OBJECTIVES:

- Describe the recommendations contained in the AFP Globalization Task Force Report.
- Develop strategies for fostering reciprocal international relationships.

  Examples: through the AFP International Conference, translation of educational materials into non-English languages, providing cultural education opportunities for fundraising professionals, and developing collaborative projects.
- Describe ways to develop individual personal contacts with fundraisers and nonprofit leaders in other countries.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - recommendations contained in the AFP Globalization Task Force Report.
  - strategies for fostering reciprocal relationships with philanthropy advocates in other countries.
  - ways to develop individual personal contacts with fundraisers and nonprofit leaders in other countries.
- One or more learners will review and summarize the AFP Globalization Task Force Report.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

- Using the AFP Research Center and the Internet, one or more learners will develop a list of international fundraising organizations and gatherings such as conferences and symposiums.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

- One or more learners will research the giving traditions of two other countries and present their findings in a written report.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

- One or more learners will—
  - Prepare a list of questions regarding fundraising issues and practices in other countries and potential opportunities for collaboration.
  - Attend an international fundraising conference and interview, fundraising professionals or nonprofit leaders from five different countries.
  - Summarize the interviews, comparing and contrasting the fundraising practices in different cultures.

LEVEL OF PRACTICE

Mid-Level (6-10 years of experience)

- One or more learners will attend an international fundraising conference in order to—
  - Initiate a business card exchange with as many international participants as possible.

- Use this list of contacts to establish an email exchange with two international colleagues to learn about their country, culture and philanthropic traditions and institutions for three months.
- Summarize what was learned.

LEVEL OF PRACTICE

Mid-Level (6-10 years of experience)

- After attending an international fundraising conference, one or more learners will brainstorm ideas for new ways for international practitioners to network at these conferences.

LEVEL OF PRACTICE

Mid-Level (6-10 years of experience)

3.4 Provide youth with educational and experiential involvement in philanthropy.

3.4 Given a case for support for a particular organization, the learner will be able to develop a plan for a youth-in-philanthropy program that supports the organization's mission and needs.

ENABLING OBJECTIVES:

- Describe ways to involve youth in the fundraising programs and other activities of individual organizations, while giving them an introduction to the broader aspects of philanthropy.
- Develop a plan for providing educational programs on philanthropy in schools and community organizations.
- Develop a plan for a mentorship program for youth interested in becoming involved in philanthropy.
- Describe a process for identifying, recruiting and training volunteer leaders for implementation of "youth in philanthropy" programs.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - how to involve youth in the fundraising programs and other activities of an organization, while introducing them to the broader aspects of philanthropy.
  - how to provide educational programs on philanthropy in schools and community organizations.
  - how to develop a mentorship program for youth interested in becoming involved in philanthropy.
  - how to identify, recruit, and train volunteer leaders to implement "youth in philanthropy" programs.

- Given a particular community, one or more learners will—
  - Develop a message for youth and their parents or guardians about the importance of "giving back to the community" and supporting it with both time and money.
  - Brainstorm opportunities and programs for communicating this message in the community.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

- Given an education or community organization whose mission it is to support the development of youth, one or more learners will—
  - Develop some program ideas for the organization that will introduce participating youth to the broader aspects of philanthropy.
  - Strategize ways to encourage and assist the organization to implement the program ideas.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

- Given a case for support for a particular organization, one or more learners will develop a plan for a youth-in-philanthropy program that supports the organization's mission and needs and introduces the youth to the broader aspects of philanthropy. The plan will include—
  - ways to involve youth in the organization's fundraising programs and other activities.
  - a mentorship program for youth interested in becoming involved in philanthropy.
  - a process for identifying, recruiting, and training volunteer leaders to implement the youth-in-philanthropy program

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

3.5 Express the value of philanthropy to the media and the public.

3.5 Given a fundamental knowledge of the history, practice and ethics associated with philanthropy and the nonprofit sector, the learner will be able to devise an awareness strategy that targets media and other community stakeholders.

ENABLING OBJECTIVES:

- List target audiences, and identify through research each one's needs, wants, values and goals that can be related to the value of philanthropy.

- Describe a program for developing a coordinated approach to building awareness of the value of philanthropy among the media and the public, including specific goals for the program and methods for evaluating its success.
- Identify the awareness-building methods that are available.
- Test awareness-building methods (Web-based and other media).
- Evaluate the awareness-building methods and make appropriate adjustments.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - the history, practice, and ethics associated with philanthropy and the nonprofit sector.
  - key audiences among community stakeholders.
  - how to identify the needs, wants, values, and goals of different target audiences that can be related to the value of philanthropy.
  - how to develop a coordinated approach to building awareness of the value of philanthropy among media and the public.
  - awareness-building methods.
  - how to test awareness-building methods, evaluate, and adjust them.
- Given a description of the local media and one of the community stakeholders, one or more learners will—
  - Identify both audiences' needs, wants, values, and goals that can be related to the value of philanthropy.
  - Develop a program (including goals) for a coordinated approach to building awareness of the value of philanthropy among the two audiences.
  - Specify the awareness-building methods to be used and how they will be tested and evaluated for their effectiveness.

LEVEL OF PRACTICE

Mid-level (3-5 years of experience)

3.6 Influence public policy to enhance the practice of philanthropy.

3.6 Given examples of statutes, laws, and regulations that enhance or hamper the practice of philanthropy, the learner will be able to devise multifaceted strategies to influence existing policy.

ENABLING OBJECTIVES:

- Describe legislative processes at the various levels of government.
- Describe the process for policy research and development of policy options.

- Describe the key elements of a case for the:
  - Support of a particular point of view on an existing public policy.
  - Need for change or modification in an existing public policy.
- Describe the most effective ways to relate to key policymakers and their staffs.
- Develop a specific plan for ensuring policy makers' consideration of specific policy measures or modifications.
- Develop a specific plan to mobilize other key stakeholders to influence legislative and/or regulatory outcomes.
- Describe specific ways to maintain key relationships with elected officials and regulators.
- Describe ways to most effectively use media contacts to promote desired policy outcomes.
- Describe specific ways to avert policy outcomes that will negatively impact philanthropy, fundraising, and particular types of organizations.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - legislative processes at the various levels of government.
  - how to do policy research and develop policy options.
  - key elements of a case in support of a particular point of view on an existing public policy.
  - key elements of a case for the need for change or modification in an existing public policy.
  - how to relate effectively to key policymakers and their staffs.
  - how to obtain policy makers' consideration of specific policy measures or modifications.
  - how to mobilize other key stakeholders to influence legislative or regulatory outcomes.
  - how to maintain key relationships with elected officials and regulators.
  - how to effectively use media contacts to promote desired policy outcomes.
  - specific ways to avert policy outcomes that will negatively impact philanthropy, fundraising, and particular types of organizations.
- Given a specific statute, law, or regulation related to the practice of philanthropy, one or more learners will develop testimony in support of the particular position taken on public policy.

LEVEL OF PRACTICE

Advanced Level (10 or more years of experience)

- Given an example of a statute, law, or regulation that hampers the practice of philanthropy, one or more learners will develop a set of strategies to influence a change or modification in the existing public policy.

LEVEL OF PRACTICE

Advanced Level (10 or more years of experience)

3.7 Create a philanthropic culture that embraces the diversity of donors and volunteers and creates an atmosphere of inclusiveness.

3.7 Given the power of philanthropy to change lives and influence society, the learner will be able to identify opportunities for inclusion of diverse cultures and constituencies throughout the organization and among those it serves.

ENABLING OBJECTIVES:

- Describe examples of how the values of diversity and inclusiveness can enhance the overall success of an organization and its fundraising programs.
- Describe specific examples of the values of philanthropy in diverse cultures and traditions.
- Describe examples of how diverse cultures and backgrounds may require different approaches in the cultivation, solicitation, and recognition processes.
- Describe ways to ensure that fundraising programs, strategies, approaches, and methods reflect and respect the values of diverse cultures and experiences.
- Describe ways to ensure the inclusion of those from diverse cultures and backgrounds in all aspects of the organization.
- Identify ways to ensure that fundraising and other staff understand and are responsive to the values of diversity and inclusiveness.
- Describe ways to broaden appreciation of the values of diversity and inclusiveness among Board members.
- Describe effective measures of progress towards diversity and inclusiveness.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - how the values of diversity and inclusiveness can enhance the overall success of an organization and its fundraising programs.
  - examples of philanthropic values in different cultures and traditions.
  - examples of how different cultures and backgrounds may require different approaches to cultivation, solicitation, and recognition.
  - ways to make fundraising programs, strategies, approaches, and methods reflect and respect the values of different cultures and experiences.

- how to include people from different cultures and backgrounds in all aspects of the organization.
- how to strengthen all staff members' understanding of and responsiveness to the values of diversity and inclusiveness.
- how to broaden appreciation of the values of diversity and inclusiveness among Board members.
- effective measures of progress towards diversity and inclusiveness.

- To better appreciate how a person's background influences their perspective on giving, two or more learners will—
  - Describe their experiences with philanthropy in their own lives and the effects on their personal philanthropy profile.
  - Compare their philanthropy experiences and differences to see how diversity of experience can affect donors' perspectives on giving.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

- Given a fundraising appeal letter and a description of the different target audiences that will receive it, one or more learners will—
  - Identify ways in which the letter could be viewed as excluding certain populations.
  - Suggest ways the letter could be made more inclusive.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

- Given a description of an organization's Board of Directors and of the community it serves, one or more learners will—
  - Decide if the Board adequately represents the community it serves.
  - Develop a recruitment plan for building a more diverse and representative Board.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

- Given a description of an organization and of the community it serves, one or more learners will—
  - Recommend any changes in the cultivation, solicitation, and recognition processes needed to build a more diverse donor base.
  - Recommend ways to ensure that the organization's fundraising programs, strategies, approaches, and methods reflect and respect the values of diverse cultures and experiences

- Recommend any changes in outreach to beneficiaries to ensure the inclusion of those from diverse cultures and backgrounds.
- Recommend any changes in the recruitment of staff members and volunteers to ensure the inclusion of those from diverse cultures and backgrounds.
- Prepare a professional development activity for all staff members on
  - how the values of diversity and inclusiveness can enhance the overall success of the organization and its fundraising programs.
  - examples of philanthropic values in different cultures and traditions.
  - how diverse cultures and backgrounds may require different approaches in the fundraising process.
- Recommend appropriate diversity and inclusiveness goals for the organization and ways to measure progress in achieving them.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

Role 4: Advancement of the Profession: Embrace a leadership role through words and deeds in promoting the ethics and benefits to society and the fundraising professional.

4.1 Serve as a personal example by demonstrating quality professional practices.

4.1 Given a solid understanding of the balance between a passion for the institutional mission and technical expertise, and other less tangible skills such as communication, salesmanship and facilitation, the learner will be able to describe characteristics of the successful professional.

ENABLING OBJECTIVES:

- Describe the ethical principles and practices developed by AFP and their implications for a fundraising professional.
- Define the key roles, responsibilities, values, and professional practices of a senior fundraising professional.
- Describe ways the professional can serve as a model to organizational staff and to other fundraising professionals at all levels.
- Describe the value of ongoing educational experiences for all levels of the profession.
- Describe the value of fully participating in the act of philanthropy—giving both one's financial resources and one's time.
- Describe the importance of giving back to and enhancing the profession.
- Describe ways that the successful professional can contribute knowledge and expertise to the profession.

  Examples: accepting leadership positions and other volunteer roles, writing, research

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - AFP ethical principles and practices and their implications for a fundraising professional.
  - key roles, responsibilities, values, and professional practices of a senior fundraising professional.
  - ways in which a senior fundraising professional can serve as a model to organizational staff and to other fundraising professionals at all levels.
  - the value of ongoing educational experiences for all levels of the fundraising profession.
  - the value of personally participating in the act of philanthropy—giving both one's financial resources and one's time.
  - the importance of giving back to and enhancing the fundraising profession.

- ways in which a successful professional can contribute knowledge and expertise to the profession.

- Two or more learners will each identify three characteristics of a successful fundraising professional.
  - The instructor or discussion facilitator will compile the characteristics on a flipchart or board.
  - Each learner will vote for the five characteristics he or she considers most important for a successful professional.
  - The instructor or discussion facilitator will compile a ranked list of characteristics.
  - The group will discuss the ranked list and the implications for success as a fundraising professional.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

- Two or more learners will—
  - Share their experiences serving on the boards of not-for-profit organizations other than the one where they are employed.
  - Discuss how these experiences helped them to better understand the service of volunteers at their own organizations.
- The instructor or discussion facilitator will—
  - Use the AFP Code of Ethics to explain the importance of discussing potential conflicts of interest with the other not-for-profit before one's volunteer service begins.
  - Describe some of the possible situations in which fundraising professionals might find themselves.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

- Two or more learners will—
  - Each record the three most important reasons why they give time or money to their favorite nonprofit organizations.
  - Share their reasons with the group.
  - Discuss how these experiences have contributed to their success as a fundraising professional.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

4.2 Lead and participate in learning activities (e.g., seminars, workshops, courses, institutes, mentoring activities).

4.2 Given an external or self-assessment tool, the learner will be able to prepare an appropriate educational plan to build knowledge and skills appropriate to professional and personal goals.

ENABLING OBJECTIVES:

- Identify and participate in appropriate learning activities that further your knowledge and commitment to the profession.
- Define personal opportunities for contributing to and furthering the body of knowledge in the development profession.

  Examples: perform research, publish, instruct, mentor.
- Develop a plan for personal support of voluntary organizations, as demonstrated by volunteer and board service.
- Participate in professional organizations and identify ongoing opportunities for involvement.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - available assessment tools for professional and personal development, including the AFP online Career Planner.
  - how to develop an educational plan to build knowledge and skills that support professional and personal goals.
  - the range of learning activities that a fundraising professional can use to further his or her knowledge and commitment to the profession.
  - opportunities for contributing to and advancing the body of knowledge in the profession.
  - opportunities for providing personal support to voluntary organizations.
  - professional organizations for fundraising professionals.
- Two or more learners will—
  - Each identify five key milestones in their career development.
  - Share their career milestones.
  - Look for common milestones.
  - Discuss at what point professional credentials became a key milestone.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

- Two or more learners will—
  - Identify the professional organizations with which they have been nvolved.
  - Share their experiences in these organizations.
  - Explain how their experiences contributed to their personal and rofessional development.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

- Two or more learners will—
  - Prepare a personal inventory of their skills and knowledge using some type of self-assessment tool.
  - Develop a five-year strategic plan for personal career development and contributions to advancing the fundraising profession.
  - Review one another's plans and provide feedback.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

4.3 Achieve professional credentials (e.g., CFRE, ACFRE, FAHP).

4.3 Given the criteria for becoming professionally credentialed (CFRE) or advanced credentialed (ACFRE, FAHP), the learner will be able to create a professional development plan for himself/herself.

ENABLING OBJECTIVES:

- Describe the personal and professional benefits of becoming professionally credentialed.
- Describe the benefits of professional certification for a broader audience (e.g., your nonprofit organization, all nonprofits, donors, and the public).
- Identify the specific requirements for certification as provided by the appropriate certifying organization.
- Demonstrate how to use certification applications as a tool for self-assessment regarding knowledge of the field and readiness for certification.
- Identify subject areas where further study or experience-based learning is needed.
- Identify ways to encourage the development of an organizational policy and budget committed to providing financial support for the professional training and the payment of dues for development staff.
- Create a plan and time line outlining the steps that need to be taken toward achieving your professional credentials.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - personal and professional benefits of becoming professionally credentialed.
  - benefits of professional certification for other stakeholders.
  - specific requirements set by certifying organizations.
  - how to use a certification application as a tool for self-assessment regarding knowledge of the field and readiness for certification.
  - how to encourage your organization to develop a policy and budget for financial support of professional training and payment of dues for development staff.
  - how to create a plan and time line for achieving professional credentials.
- Each learner will—
  - Review his or her organization's policy and budget for financial support of professional training and payment of dues for development staff.
  - Develop a list of any suggested improvements.
  - Prepare a proposal or presentation to senior decision-makers advocating the suggested improvements.
  - Receive feedback on ways to improve the proposal or presentation.

LEVEL OF PRACTICE

Entry Level (1-5 years of experience)

- Each learner will—
  - Identify a professional credential to achieve.
  - Review the appropriate certification application.
  - Create a plan and time line for achieving the professional credential.
  - Explain the rationale for the plan and time line.
  - Receive feedback on ways to improve the plan and time line.
  - Report back on implementation of plan goals on a periodic basis.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

4.4 Contribute to a heightened awareness of the profession through formal and informal activities and collaborations.

4.4 Given the goal of promoting the fundraising profession and its value to philanthropy and to society, the learner will be able to create a plan for reaching out to the broader public to enhance understanding of the profession.

ENABLING OBJECTIVES:

- Describe the key types of formal and informal activities and collaborations that personally can be used to promote the fundraising profession and its value to philanthropy and society.
- Describe specific examples of personal skills and expertise that can be used to achieve this goal.
- Describe personal examples of past activities and collaborations that have contributed to awareness of the profession beyond the immediate fundraising-related community.
- Describe the key elements of a plan (including evaluation components) to personally contribute to a heightened awareness of the fundraising profession.

SUGGESTED LEARNING ACTIVITIES:

- Lecturette or selected readings or group discussion(s) on—
  - key types of formal and informal activities and collaborations that an individual can use to promote to the broader public the fundraising profession and its value to philanthropy and society.
  - specific skills and areas of expertise that can be used to achieve this goal.
  - how to develop a plan for personally contributing to a heightened awareness of the fundraising profession.
- Each learner will—
  - Develop a personal plan and time line for promoting to the broader public the fundraising profession and its value to philanthropy and society.
  - Explain the rationale for the plan and time line.
  - Receive feedback on ways to improve the plan and time line.
  - Report back on implementation of plan goals on a periodic basis.

LEVEL OF PRACTICE

Mid-Level (6-9 years of experience)

NOTES

Association of Fundraising Professionals

INTERNATIONAL HEADQUARTERS

4300 Wilson Blvd., Ste. 300 | Arlington, Va. 22203703-684-0410 | 800-666-3863
(U.S. & Canada) | 703-684-0540 fax

MEXICO

Aniceto Ortega 629, Colonia del Valle | CP 03100, Ciudad de Mexico, DF
(52) 55-3626-1592 | (52) 55-3626-1593 fax | Toll free 001-866-837-1948

CANADA

275 Slater St., Ste. 900 | Ottawa, ON KIP 5H9
613-236-0658 | 613-236-1918 fax

www.afpnet.org

The Association of Fundraising Professionals (AFP) represents more than 26,000 members in over 170 chapters throughout North America and the world, working to advance philanthropy through advocacy, research, education, and certification programs. The Association fosters development and growth of fundraising professionals and promotes high ethical standards in the fundraising profession. AFP was formerly the National Society of Fund Raising Executives.