

SECTION I – PROGRAM OVERVIEW

1.1 Highlights of the AFP Fundamentals of Fundraising Course

1.1.1 Program Objectives:

The *AFP Fundamentals of Fundraising Course* objectives help fundraisers to:

- Explain the culture of philanthropy and the role philanthropy plays in organizations.
- Name 8-10 key reasons people give.
- Describe the primary sources of contributions.
- List the essential components of an integrated development program.
- State key qualities that every fundraiser should possess.
- Describe a basic path for personal professional development.
- Describe the importance of ethics and accountability in fundraising.
- Discuss the relationship between the organizational planning and development planning.
- Define, clearly articulate, and evaluate the case for support.
- Describe the essential components of an integrated development program and the primary purpose of each one.
- Identify stakeholders typically affected by a development plan.
- Distinguish the differences between and uses for annual giving, major gifts, and planned giving.
- Define the reasons for and differences between gift acknowledgement, acceptance, and recognition policies.
- Implement a development plan that supports the organization’s overall mission and strategic plan, and meets the needs of stakeholders.
- Explain the definition of marketing and describe its application to fundraising.
- Cite examples of communications methods and describe how each might be used to cultivate and retain donors.
- Identify a variety of ways an organization’s marketing message can be shared with stakeholders, and suggest which best fit particular stakeholders.
- Prepare donor-centered solicitation materials that will influence and facilitate informed gift decision.
- Describe the role of technology in communications and fundraising.
- Explain the role of research in identifying individuals and groups with the capacity and potential to give in order to qualify them for further research and cultivation efforts.
- Identify and segment the pool of potential donors, using appropriate variables such as previous gift level and potential, interest areas and relationship to organization, and organizational needs.
- Contribute to developing mutually beneficial relationships with donors and qualified prospective donors.
- Describe examples of effective cultivation strategies and identify steps to use to maximize gift return on an ongoing basis.
- Cite examples of effective relationship-building strategies.
- Define “stewardship” and describe its role in building lasting relationships.

- Discuss application of appropriate acknowledgement, acceptance, and recognition practices.
- Describe solicitation techniques used in annual giving programs.
- Identify, recruit, and prepare the appropriate mix of volunteers, staff, and professionals to carry out solicitations.
- Discuss the six steps to a “model” major gift solicitation.
- Describe how to develop, implement, and evaluate solicitation strategies that will maximize the outcomes of solicitation efforts.
- List strategies for obtaining support from corporations/businesses, foundations, and government entities.
- Describe the process for developing and presenting a written grant proposal.
- Explain ways to use volunteers to help achieve organizational and fundraising objectives.
- Discuss the key elements of a structured process for identifying, recruiting, managing, motivating, evaluating and retaining volunteers.
- Initiate, maintain and enhance continuing and mutually beneficial relationships with volunteers.
- Describe a model volunteer orientation program.
- Describe effective techniques for recruiting, training, managing, evaluating and recognizing volunteers.
- Explain the board’s role in fundraising.
- Describe ways to best use volunteers in the fundraising process.
- Participate appropriately in the organization’s budget and planning process.
- Discuss policies and procedures to ensure the integrity of donor intent and to honor donors and volunteers in ways appropriate to their contributions.
- Describe key considerations in recruiting, accepting, recording, acknowledging, tracking, and reporting gifts and pledges.
- Explain how effective donor records management and proper stewardship of funds support and enhance relationships.
- Describe the essential roles and responsibilities of board and staff members.
- Discuss methods for evaluating development program performance.
- Discuss the relevant legal and regulatory requirements for information maintained in a donor database, and state potential sources for this information.

1.1.2 Course Content:

The ***AFP Fundamentals of Fundraising Course*** was developed with a foundation from the AFP Essentials of Fundraising Program and the AFP First Course in Fundraising course. It is up to date, including the latest in technology from social media to CRM. The course is composed of 7 modules that have been designed by experienced fundraising professionals to meet the real-world needs and challenges nonprofit organizations face every day. This 16-hour program includes case studies and projects for groups and individuals to make the learning experience both substantive and enjoyable. The ***AFP Fundamentals of Fundraising Course*** offers a complete overview of the development function, featuring the most current information and techniques. This 16-hour intensive program will provide an overview of skills, techniques, and program components for individuals with 0 to 4 years of fundraising experience.

The modules include:

- Module I: Overview of Fundraising
- Module II: Developing an Integrated Fundraising Program
- Module III: Marketing for Ongoing Success
- Module IV: Building and Sustaining Relationships
- Module V: Securing the Gift
- Module VI: Volunteers – Partners in Fundraising
- Module VII: Management & Accountability

The **AFP Fundamentals of Fundraising Course** is presented through lecture, case studies, and the encouragement of participant dialogue. Printed participant manuals and faculty materials are ordered by the course host(s) for distribution to faculty members and participants.

1.1.3 Audience:

The **AFP Fundamental of Fundraising Course** is designed for fundraising professionals with 0 to 4 years of experience. This may also include others who have responsibility for the development function such as:

- executive directors;
- vice presidents of development;
- program managers;
- marketing staff;
- special event coordinators; and
- leadership volunteers for local nonprofits and foundations.

Individuals who are transitioning into the sector and those new to the development field will learn how to organize and manage fundraising programs, gain basic skills in a variety of techniques, and prepare for a career in development. Trustees and CEOs will discover useful tools to change the direction and clarify the expectation of the development office. Volunteers will find this course a valuable preparation for gift solicitation. Course attendance averages between 20 to 30 participants and CFRE continuing education points can be earned.

1.1.4 Length:

The **AFP Fundamentals of Fundraising Course** is a 16-hour CFRE approved course. The course can be offered in a variety of time lengths, over multiple days or weeks. The course host(s) may choose to offer the modules that are best for them and their participants. The recommended layouts of length are:

Day 1	8:00 a.m. – 5:30 p.m.		1 module per	i.e. 10:00 a.m. – 12:30 p.m.
Day 2	8:00 a.m. – 5:30 p.m.	OR	day/session	or 5:00pm – 7:30 p.m.

*Please reference sample Agenda in on page 16.

1.2 Basic Information

See flyer below, which can be customized for local promotion of the course.



For more information on the course, visit www.afpglobal.org Professional Development

AFP Fundamentals of Fundraising Course

The *AFP Fundamentals of Fundraising Course* is designed by experienced fundraising professionals to meet the real-world needs and challenges nonprofit organizations face every day. The International Standard for training the fundraising novice, the *AFP Fundamentals of Fundraising Course* offers a complete overview of the development function, featuring the most current information and techniques. This 16-hour program includes case studies and projects for groups and individuals, making the learning experience both substantive and enjoyable.

This intensive program will provide an overview of skills, techniques and program components for individuals with up to 4 years of fundraising experience. Full participation in the *AFP Fundamentals of Fundraising Course* is applicable for **16.0 points** of CFRE Credit in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.

The modules are:

- Module 1:** Overview of Fundraising
- Module 2:** Developing an Integrated Fundraising Program
- Module 3:** Marketing for Ongoing Success
- Module 4:** Building & Sustaining Relationships
- Module 5:** Securing the Gift
- Module 6:** Volunteers – Partners in Fundraising
- Module 7:** Management & Accountability

Enter the prices here

Enter key information here, to include dates, times, class location with street address, and online link for more information and to register for the class.

1.3 Instructor-Level Information

Preferred Instructor Qualifications:

- Hold a CFRE or ACFRE, and ideally Master's Degree or PhD credential. Individuals who are retired but who held the CFRE credential at the time of their retirement are also eligible to teach.
- AFP Faculty Training Academy graduate – an AFP Master Trainer
- Experienced and generalist fundraiser – Have a broad range of fundraising experience with proven teaching abilities.
- Most important is that each faculty member must be knowledgeable about the subject of the module(s) he/she is to teach, and must be able to communicate effectively in front of a group.
- An experienced trainer, especially as a facilitator for a highly interactive course like this.

SECTION II – ADMINISTRATIVE INFORMATION

2.1 Administrative Guidelines

The following information highlights and clarifies significant administrative policies, procedures, and implementation guidelines as they pertain to the ***AFP Fundamentals of Fundraising Course***. They are designed to assist course host(s) with the delivery of the Fundamentals course and will remain in effect until the program is revised or a future administrative policy or procedure that supersedes them is released.

The goals of the implementation process are to:

- Orient instructors and instructor trainers to the ***AFP Fundamentals of Fundraising Course*** products;
- Prepare instructors and instructor trainers to conduct the ***AFP Fundamentals of Fundraising Course***;
- Standardize instructional content and methodology so that all instructors are conducting the courses in a consistently uniform manner;
- Help the course host(s) understand and implement their duties.

Per CFRE International and the CFRE Application, CFRE Points earned are as follows:

- **1 point** for each hour spent **attending** educational conference sessions or workshops. For this course, that is 16 points when conducted as indicated in the Agenda template below.
- **2 points** for each hour spent **teaching** educational conference sessions or workshops using previously developed material. At any time the teaching **cannot** be part of the applicant's regular job duties. For this course, that is determined by the amount of time actually teaching/facilitating during the course of the class.

2.1.1 Course Pricing Guidelines:

The **base price charged to participants is \$419 AFP Member; \$529 Non-Member**. The chapter may choose to charge more to underwrite additional expenses, or may charge less, when a grant or donation has been provided to help underwrite costs the chapter incurs. However, the amount that the Chapter pays to AFP GLOBAL remains the same. The fee structure for payments to AFP GLOBAL is as follows:

<i>AFP Fundamentals of Fundraising Course</i>	Joint Venture	Non-AFP Member Third Party Franchise Fee
Full Course (all 7 Modules)	\$209 AFP Member; \$269 Non-Member (1/2 of the base price charged to each participant)	\$5,000.00 + \$50.00 per participant

- Please note that the AFP Member Franchise Fee and the Non-AFP Member Third Party Franchise Fee cover a **one time use of each module**, taught in a two-day period or over an extended period of time.

2.1.2 Timing:

To help ensure success, especially in recruiting the preferred faculty and registering the desired larger numbers of participants, you should start the process early.

AFP recommends that at least six (6) months and ideally 9 to 12 months in advance of the scheduled class start date, you:

Site Coordinator – Have your Site Coordinator recruited, oriented to the task at hand, and underway.

Dates and Venue – Have confirmed the class dates and the site where the training will be conducted.

Signed Host Agreement and Deposit – Complete sign, scan and e-mail to AFP GLOBAL the Host Agreement Form (see pages 26-29). At about the same time, send the deposit. Why so much time? You need to reach people while they still have the class dates open on their calendars. People make many commitments months in advance.

Online Registration – Make sure you complete set up of the online registration by the time you send the signed Host Agreement Form, or as soon as possible thereafter. With the online link for registration and the information contained in the Host Agreement, AFP GLOBAL can post the key information on www.afpglobal.org. This posting reaches potential participants from around the world, particularly in North America, and gives them the information they need to proceed.

Promotion – Begin aggressive promotion through as many channels as possible. Do not limit your promotion to your Chapter members, take it to every organization and every fundraiser you can within your state and nearby states.

Faculty – Begin recruitment of the best qualified faculty. The sooner you reach out, the better chance you will have that your targeted faculty will have the class dates available on their calendars. You should have all your faculty locked in and preparing as soon as possible, but no later than two months before the class start date.

2.1.3 Course Products:

Products
<i>AFP Fundamentals of Fundraising Course</i> Participant Manual
<i>AFP Fundamentals of Fundraising Course</i> Module I: Overview of Fundraising
<i>AFP Fundamentals of Fundraising Course</i> Module II: Developing an Integrated Fundraising Program
<i>AFP Fundamentals of Fundraising Course</i> Module III: Marketing for Ongoing Success
<i>AFP Fundamentals of Fundraising Course</i> Module IV: Building and Sustaining Relationships
<i>AFP Fundamentals of Fundraising Course</i> Module V: Securing the Gift
<i>AFP Fundamentals of Fundraising Course</i> Module VI: Volunteers – Partners in Fundraising
<i>AFP Fundamentals of Fundraising Course</i> Module VII: Management & Accountability
<i>AFP Fundamentals of Fundraising Course</i> PowerPoint Slides
<i>AFP Fundamentals of Fundraising Course</i> Faculty Manual
Host Toolkit
Marketing Toolkit
Participant completion certificate
Name badge stock
Course roster sign-in sheets

2.1.4 Pricing & Ordering Information:

The base registration fee for participants is \$419 for AFP members and \$529 for non-members. From this, the AFP Global receives \$209 per member and \$269 per non-member. The course host(s) may choose to charge a fee higher or lower than the base fee to subsidize the registration fee for some participants (charging less than \$419) or to cover extra meals or other costs. In this case, AFP GLOBAL still receives \$209/member and \$269/non-member.

Additionally, there will be a \$1,000.00 deposit in U.S. dollars made to AFP GLOBAL by a host chapter upon signing the course Agreement. This \$1,000.00 will be applied to the total cost of your course and is required up front for AFP to ensure you receive all participant/faculty materials/products on time, as well as to cover AFP’s incurred costs in supporting the class. Should you decide to cancel or reschedule for any reason, the deposit is not refunded, the deposit is not refunded, though – at AFP GLOBAL discretion – it may be applied as deposit to a future or rescheduled class. **The deposit must be received at AFP GLOBAL no later than 60 days prior to the planned start date.** The course host(s) collects and tracks all registration fees. All invoices from AFP International are in U.S. Dollars.

TO PLACE YOUR ORDER:

- Email your final faculty list to AFP Global no later than 8 weeks prior to the course start date for faculty materials to be shipped.
- Email your nearly final participant list to the AFP Global no later than 4 weeks prior to the course date for participant materials/manuals to be shipped.
- On the Agreement Form, PLEASE make sure you provide a street address and not a PO Box for the shipment manuals. Shipments to you will come to your designated site either UPS or FedEx; and neither can deliver to a PO Box.
- Provide AFP GLOBAL with the online link to which potential participants can go for more information on the course and to register for the class.

Course host(s) within the USA will not be charged for shipping & handling. However, if AFP GLOBAL receives your faculty or participant lists past the recommended date above, **an expedited shipping charge will be added to your final invoice.** After shipping the agreed upon number of participant manuals, if you request additional manuals, your **chapter will be charged the shipping costs for these additional manuals in the final invoice.**

NOTE: Materials being shipped to Mexico or Canada will incur separate shipping fees, charged to the host chapter or organization.

2.1.5 Where:

The course host(s) is responsible for securing a location to hold the course. Some course hosts choose to use hotel meeting rooms; others have a training room or conference room (e.g., in a public library or an AFP member organization's facility), which can be utilized without cost.

The course host(s) must select and submit the location for the ***AFP Fundamentals of Fundraising Course*** before the date will be listed on the AFP education schedule. When selecting the location, a course host should consider the following:

- The site should be accessible by any participants with a disability (i.e., ramps for wheelchairs; accessible restrooms, etc.)
- The site should be in a central location, with easy access to area highways, etc., and in close proximity to area hotels for out-of-town participants.
- Room set-up for the course should be set in rounds. A registration table should be set up outside the door to the room, or just inside the room, for easy registration.
- Audio visual requirements for the course include a computer, LCD projector, screen, flip chart, markers, lectern and/or podium (if desired), and possibly a microphone, depending on the size of the room. There should be a table at the front of the room for faculty materials.

2.1.6 Responsibilities:

Course Host(s) Responsibilities:

- Select dates six (**6 months or more in advance**) (ideally 9 to 12).
- Complete the agreement contract and submit to AFP GLOBAL along with the deposit as soon as a date and venue have been chosen; **but the deposit must be received at AFP GLOBAL no later than 60 days prior to the planned start date.**
- Select one person to coordinate details with AFP Global
- Submit course to CFRE International for credit and tracking.
- Select a location to hold the course.
- Recruit faculty and provide list to AFP Global. Request faculty materials from AFP GLOBAL to be sent to the course host as soon as faculty is confirmed, but at least 4-6 weeks prior to course – to allow faculty sufficient time to prepare. The course site coordinator is then responsible for dispersing the materials – electronic and hardcopy to the individual members of the faculty.
- Collect registration fees.
- Arrange for snack breaks and meals, if applicable.
- Order participant manuals from AFP GLOBAL (to be sent by Omnipress).
- Provide an on-site monitor (The Site Coordinator) to
 - ensure that participants sign in,
 - welcome and introduce faculty members,
 - distribute the participant survey at the start of the class – then, collect all at end of the class before participants depart,
 - and sign and distribute certificates of completion to participants at the end of the course.
- Provide AFP GLOBAL with
 - a financial summary (including number of AFP members and non-members in attendance),
 - a final participant roster with documentation of who is an AFP Member and who is non-member, scanned copy of each sign-in sheet, and
 - a copy of the course agenda with faculty names, upon completion of the program.
- Provide AFP GLOBAL with a financial summary, a final participant roster (including number of AFP members and non-members in attendance), Completed Sign-In Sheets, and a copy of the course agenda with faculty names next to modules each taught, upon completion of the program.
- If the host has unused participant manuals after the conclusion of the class, the host may choose either to retain the manuals for a future class or return them to AFP Global. **If retained, the host is charged \$50 for each manual, which will be a credit for the that future class. If returned, the host is responsible for the costs of the return shipping of the manuals.**

- Obtain from all faculty their assigned copies of the participant manual, for the chapter to retain for use in the chapter's future classes of this course.

AFP Global Responsibilities:

- Post the course information on the AFP website.
- Contact the course host(s) for the faculty list and participant list in order to send faculty materials and participant manuals for arrival on time.
- Invoice course host(s) at the close of the course. Balance of payment due once course is completed and the financial summary and other materials are received from the course host(s).

CFRE Points – CFRE Credit & Tracking?

Every time an AFP Chapter offers any AFP International courses, it is the Chapter's responsibility to submit to CFRE International to get it approved. Though the Association of Fundraising Professionals overall is a member, individual AFP Chapters need to complete the Approved Provider Application. This includes your Chapter. You can do this at the CFRE International Website.

Breadcrumbs: www.cfre.org → Bar across top → **Education** → **Becoming An Approved Provider** → Note that near the bottom of the page it states that “The (Provider) fee is waived for our Participation Organisations and their chapters.” This includes the Association of Fundraising Professionals → **Approved Provider Application**

Complete and submit the Approved Provider Application. Under “Fees,” click on the button in front of the statement that reads “No Fee – Participating Organisation”

Each course a person took would have an individual CE tracker or certificate (like the AFP classroom courses - e.g., AFP CFRE Refresher Course) if it is eligible for credit. Individuals can then keep track of her own credits by adding them to their online application at www.cfre.org

Regarding how CFRE Points are measured, per CFRE International and the CFRE Application:
1 point for each hour spent **attending** educational conference sessions or workshops. 2 points for each hour spent **teaching** educational conference sessions or workshops using **previously developed material**. 3 points for each hour spent teaching educational conference sessions or workshops using newly developed material. The teaching can't be part of the applicant's regular job duties, however.

2.2 Planning Time Line and Checklist AFP Fundamentals of Fundraising Course

	# of Weeks Prior	PMR	Date Due	Date Done
1. Choose course dates - check calendar for conflicts				
2. Appoint individual to be primary contact with the AFP GLOBAL and on-site coordinator				
3. Submit deposit in U.S. dollars and signed agreement to AFP Global. Must be received at AFP GLOBAL no later than 60 days prior to planned start date.				
4. Select location, execute commitment				
5. Develop a budget				
6. Apply to CFRE International for approval of CFRE Points				
7. Plan promotion campaign/target audience – Should allow at least six, and ideally 10-12 months for promotion				
8. Place newsletter article: advise surrounding chapters to do the same; date will be listed on the Website.				
9. Prepare brochures for promoting course				
10. Obtain mailing lists from course host(s)				
11. Recruit faculty (should be completed at least 4-6 weeks prior to course to allow time to prepare), collect faculty bios for introductions, and order faculty materials from AFP Global. Ask each faculty member to sign and return to site coordinator the <i>AFP Fundamentals of Fundraising Course</i> faculty agreement form located on last page of this Host Toolkit. Site coordinator bundles and sends all to AFP Global.				
12. Plan catering, A/V support and confirm arrangements				
13. Mail/email brochure				
14. Send follow-up postcard or letter to the initial list of prospects				
15. Confirm catering				
16. Order participant manuals from AFP GLOBAL (should be done 4 or more weeks prior to course)				
17. Develop agenda, faculty roster and participant roster and make copies for participants				
18. Prepare name badges or name tents for participants				
19. Assemble materials needed onsite (receipt book, pens, sign-in sheet, PowerPoint slides, agendas, rosters, certificates, name badges, or name tents)				
20. Provide financial summary and return any extra manuals				

2.3 Sample Budget for Option A: Joint Venture

AFP Fundamentals of Fundraising Course ***(based on 12 AFP Member participants)***

INCOME

Course Registration Income (\$419 x 12 participants, all AFP members)	\$ 5,028.00
Sponsorship/partnerships	\$ 500.00

TOTAL INCOME COULD BE **\$5,528.00**

EXPENSES

Marketing materials & postage	
Printing 500 brochures	\$ 150.00
Postage (300 @ \$0.42)	\$ 126.00
Mailing	\$ 50.00
AFP Fundamentals of Fundraising Course fee @ \$209 x 12 participants	\$ 2,580.00
Meeting room fees @ \$300 x 2 days	\$ 600.00
Lunches and breaks @ \$30 per person x 12 persons	\$ 360.00

TOTAL EXPENSES **\$3,794.00**

TOTAL NET REVENUE **\$1,734.00**

NOTE: Budgets will vary according to attendee (member/non-member), printing, advertising costs, meeting space rental, and food costs in your area. All amounts above are in U.S. Dollars.

NOTE: AFP GLOBAL will provide you with certificate blanks and name-badge blanks in electronic form. You will need to make use of your own certificate stock or obtain it from an office supply store. AFP GLOBAL recommends that you make use of your or a colleague's office printer for preparing certificates and badges. You can utilize an outside vendor (e.g., STAPLES, Office Depot, FedEx or some other office supply store) to do this; but it can be costly. If you do plan to use a vendor, be sure to build this greater expense into your budget.

NOTE: Materials being shipped to Mexico or Canada will incur separate shipping fees, charged to the host chapter.

2.4 Recommended Agenda: Two-Day Course

AFP Fundamentals of Fundraising Course

DAY 1		INSTRUCTOR
8:00-9:45 a.m.	Module 1: Overview of Fundraising	
9:45-10:00	<i>Break</i>	
10:00-10:30	Module 1 <i>continues</i>	
10:30-12:00 p.m.	Module 2: Developing an Integrated Fundraising Program	
12:00- 1:00	<i>Lunch Break</i>	
1:00-1;30	Module 2 <i>continues</i>	
1:30-3:00	Module 3: Marketing for Ongoing Success	
3:00-3:15	<i>Break</i>	
3:15-3:45	Module 3: <i>continues</i>	
3:45 -5:30	Module 4: Building & Sustaining Relationships	

Day 2		INSTRUCTOR
8:00-8:45 a.m.	Module 4: <i>continues</i>	
8:45-9:45	Module 5: Securing the Gift	
9:45 -10:00	<i>Break</i>	
10:00-11:00	Module 5: <i>continues</i>	
11:00-12:00 p.m.	Module 6: Volunteers – Partners in Fundraising	
12:00-1:00	<i>Lunch Break</i>	
1:00-2:00	Module 6: <i>continues</i>	
2:00-3:00	Module 7: Management & Accountability	
3:00-3:15	<i>Break</i>	
3:15-5:30	Module 7: <i>ends, followed by final course reflection activities, closing comments</i>	
5:30-5:45	Presentation of certificates, etc.	

Full participation in the **AFP Fundamentals of Fundraising Course** with 16 contact hours is applicable for **16.0 points** of CFRE Credit in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.

2.5 Planning Tips

Assign one person to act as a liaison with the AFP Global. You will also need an on-site program monitor to act as host during the event. (This may be the same person in both instances.)

In developing your own promotional materials, please forward a draft of your promotional brochure and other related materials for review to the AFP GLOBAL prior to printing/distribution.

If you're choosing to hold the ***AFP Fundamentals of Fundraising Course*** over two days you should arrange for meal functions and beverage service in close proximity to the meeting room used for the ***AFP Fundamentals of Fundraising Course***. Course host(s) traditionally provides one lunch and morning and afternoon beverage breaks during the course.

If the ***AFP Fundamentals of Fundraising Course*** is being offered as part of a conference where other sessions will be held, you may want to prepare specially marked badges for ***AFP Fundamentals of Fundraising Course*** attendees (e.g., badges printed on different colored paper or bearing colored dots) as a means of assuring that only ***AFP Fundamentals of Fundraising Course*** attendees receive course materials.

Scholarships: It may be helpful to create a scholarship fund to support individuals who, for financial reasons, may be unable to attend the ***AFP Fundamentals of Fundraising Course***. Scholarships are not offered through the AFP International Headquarters. You will still pay AFP GLOBAL half of \$419/\$529. The scholarship comes out of the course hosts' budget or through a local area partner.

The first sources for scholarship funding may well be the networks used to promote the ***AFP Fundamentals of Fundraising Course***. These networks may be willing to sponsor the attendance of a number of employees from their own organizations. Requests to United Way, the State Arts Council and other state departments, as well as faith-based groups may generate funds for scholarships.

Another source for scholarship funds is local foundations or corporations. These funding sources often have a strong interest in providing technical assistance to encourage the fundraising capabilities of nonprofit organizations.

2.6 Recruiting Faculty for the AFP Fundamentals of Fundraising Course

Faculty for the *AFP Fundamentals of Fundraising Course* is selected by the course host(s).

- **Credentials** – It is recommended that faculty members for the *AFP Fundamentals of Fundraising Course* hold either a CFRE, ACFRE, Masters Degree or PhD credential. Individuals who are retired but who held the CFRE credential at the time of their retirement are also eligible to teach.
- **Subject Matter Knowledge and Expertise – Most important** is that each faculty member must be knowledgeable about and expertise in the subject of the module(s) he/she is to teach, and must be able to communicate effectively in front of a group.
- **AFP Master Trainers** – A list of individuals who have graduated from AFP’s Faculty Training Academy (FTA) is available from the AFP Global. These individuals are willing to serve as instructors and as resources to your *AFP Fundamentals of Fundraising Course* faculty members. They are also available by phone to offer suggestions on how to select good instructors. Travel and lodging expenses for these individuals are the responsibility of the chapter.
- **One Facilitator, Two or More Modules** – It is fine for one person to teach more than one module if he or she is an expert in those subject areas.
- **Back-Up Faculty** -- You may wish to have a back-up facilitator available in case someone arrives late or fails to arrive.
- **Diversity** – Please strive for diversity in gender, ethnicity, and organizational type.
- **Complete Faculty Recruitment Months in Advance** – Ideally three or more months, but at least 4-6 weeks prior to the course, complete recruitment of all faculty members, and provide each with Faculty materials, to give them plenty of time to prepare.

Faculty Support includes:

- **Materials to Faculty in Advance** – Faculty receive all the materials they need from the Site Coordinator; and they should be receiving these materials in advance. So, they will have the time to prepare – on their own as well as with the rest of the faculty conducting the class. Materials include the Faculty Manual and PowerPoint Slides in electronic Form and the participant manual in hardcopy.

2.7 Marketing the AFP Fundamentals of Fundraising Course

It is recommended that a local planning committee be established to promote the ***AFP Fundamentals of Fundraising Course***. In addition to sponsoring the course with other AFP chapters, it can also be effective to create a partnership with other local chapters of related organizations (such as ALDE chapters, local Planned Giving Councils, AHP regions, etc.) or other local service providers such as the Red Cross, United Way, the Voluntary Action Center or Support Center, a continuing education program within an institution of higher education, etc.

Targeting the Market

The marketing effort begins as soon as a signed contract is forwarded to the AFP International Headquarters. Marketing this class is much like marketing the fundraising effort for an institution. First, the general markets must be targeted, and then specific prospects within each market must be identified.

Primary markets are:

- members of area AFP chapters who have 0-4 years of experience;
- attendees of past AFP chapter programs;
- fundraising professionals in your chapter's area who are not currently members of AFP, but who may be on a prospect list.
- Staff and volunteers in non-profit organizations who themselves are not fundraisers, but who work with them and so can benefit from a better understanding of what fundraising involves.

Additional markets include:

- advocacy organizations;
- arts, cultural and historical organizations;
- educational institutions including private, parochial, alternative and public schools, and colleges and universities;
- environmental groups;
- health and human service organizations;
- religious groups, synagogues and churches;
- United Way agencies.

Marketing Strategies

After the prospects have been identified, the planning committee must develop appropriate marketing strategies. The planning committee should also brainstorm local networks that might be useful to help promote the program.

1. Developing promotional materials

Sample language for ***AFP Fundamentals of Fundraising Course*** fliers can be found in this packet, along with camera-ready art for a self-mailer, with space to insert the dates and location of your program.

- ***Remember:*** materials should be targeted to the needs of your audience. You can brainstorm effective promotional messages and then test them with likely audiences before going to print.
- Ask a local individual, who has attended the ***AFP Fundamentals of Fundraising Course*** in the past, to provide testimonial for use in promotional materials.

2. Using local networks

An important marketing strategy is to secure endorsements of networks to which your members may belong. These networks may be able to provide promotional support. For example, make arrangements with a network leader to direct a personalized letter to members. The letter can recommend attendance at the ***AFP Fundamentals of Fundraising Course***. The course host(s) should provide a draft letter and a registration reply card.

Local networks might include:

- Faith-based groups, Regional, state, provincial, national religious bodies for the denomination, including outreach groups of those denominational bodies, etc.
- state agencies/departments with sub-grantees including the state council on the arts and humanities; departments of health, elderly affairs and human services;
- United Way and the United Way Management Assistance Program (MAP)

3. Ensuring personal follow-up

After local networks have been used and the promotional materials released, it may be necessary to do personal follow-up to prospective participants, to ensure maximum attendance.

Targeted prospects within each market should receive a telephone call. A script of key points to cover in the telephone call can be developed by the planning committee. Members of the planning committee and AFP chapter Board of Directors should call the prospects they know best.

Benefits to your Chapter/Organization

1. Enhances your Chapter/Organization's Image

The ***AFP Fundamentals of Fundraising Course*** is the International Standard for training the novice professional in fundraising. Adopting this Course significantly enhances the image of your chapter as a leadership community organization responding to needs of fundraising professionals' basic learning objectives. As partner in this program, your chapter demonstrates to your members a commitment to ensure quality basic fundraising knowledge.

2. Generates Significant Income

The ***AFP Fundamentals of Fundraising Course*** can also generate significant revenue for your chapter/organization through:

- Member/Non-member sales;
- Enhanced authorized provider fees;
- Developing cross marketing relationships in the local fundraising service area; and
- Opening doors for interest in members of other AFP programs/courses that your chapter/organization may offer

3. Easy Implementation

By partnering with AFP IHQ, you have the assistance and experience knowledge to host a course without any hiccups. The support system you will receive from AFP GLOBAL or chapters who have hosted in the past will help you host a successful course easily. The related costs are minimal compared to the profit that is possible to achieve.

2.8 Onsite Checklist for AFP Fundamentals of Fundraising Course Host(s)

Done	Task
	On the day of the <i>AFP Fundamentals of Fundraising Course</i> , arrive an hour and 15 minutes before the start of the course. Check that room set-up is correct. (tables, chairs, computer, LCD projector, Laptop with PowerPoint installed and connected to projector by HDMI connector (if needed), screen, flipchart(s), table for presenter in front of room, and registration table).
	Place sign-in sheet, agenda copies, participant roster, and participant manuals on registration desk. Lay out name badges and/or name tents - alpha by last name makes finding a name easy. Have blank badges/tents and markers ready for on-site registrants.
	Lay out faculty name badges.
	Set out any AFP promotional materials, etc.
	As participants arrive, give them their name badge and/or tent, manual, agenda, and participant list.
	Important: Have participants sign the sign-in sheet. This sheet must be signed in order for a participant to receive a certificate. <u>It is the responsibility of the on-site coordinator</u> to be sure all participants sign the roster at the beginning of <u>each</u> day.
	Any unregistered participants should complete an on-site registration form and sign in on the sign-in sheet. On-site registrants may pay on-site by check or credit card depending on how the chapter is able to collect money.
	Copy of Slides as a Handout: Participants may ask you for a copy of the course slides; they often believe the slides are needed to have a full record of what they're learning. That may be true in some situations. However, this course has been designed and developed following adult learning principles and practices as well as what research has shown about how our brains learn. That means, in part, that the slides are for the most part only "visual placeholders;" the Participant Manual has everything the slides contain, and much more. There is no need to provide the slides to participants and, in fact, we ask specifically that you do not.
	As faculty members arrive, give them their name badges. Have someone available to assist them setting up. Let each faculty member know you will signal them when they have five (5) minutes remaining in their session.
	At the designated starting time, begin the <i>AFP Fundamentals of Fundraising Course</i> with introductions.
	Introduce each faculty member at the beginning of each module.
	Signal each faculty member when five (5) minutes remain in his/her session. At the end of the session, publicly thank the faculty member.
	Announce when breaks begin and end, and where food is being served if you are providing lunch. Be persistent in getting the program started on time after each break.
	After the last module of the day, thank participants for coming and remind them what time tomorrow's session will begin.

	During the second day, remember to have each participant sign the sign-in sheet.
	Towards the end of the day, sign the certificate of completion for each participant who has attended the entire AFP Fundamentals of Fundraising Course .
	<p>Participants Evaluation Form – You should have received an electronic copy of the Participant Evaluation Form in M/S Word. Please enter dates and location of the class at the head of the form. Also, make sure that you insert as many “faculty blocks” as necessary so that there is one for each faculty member. Insert the faculty member’s name for each one, in the order that each teaches. Then, make copies and distribute to all participants at the start of the class. Request that – as appropriate -- they</p> <ul style="list-style-type: none"> • Fill it out as the class progresses. • Then, complete the form before leaving the classroom on the last day, and • Hand it in directly to you, the on-site coordinator before they leave. <p>Then, please scan all the completed participant evaluation forms and e-mail them all to Erin Rains at Erin.rains@afpglobal.org</p>
	Distribute a Certificates of Completion to each participant, and thank everyone for attending.
	Collect ALL faculty used copies of the participant manual from all faculty who have not yet returned them to you. The Chapter then retains these participant manuals for use by faculty for the next classes.
	<p>Prepare materials to send back to the AFP GLOBAL within 5 days of the course. Where possible, the chapter is encouraged to scan the documents and send them as e-mail attachments.</p> <ul style="list-style-type: none"> • Final Class Roster/Registration List (which includes indication for participants as to whether each is an AFP Member or Non-Member) • Scanned copy of the filled out Sign-In Sheets • Final List of faculty with credentials • Final Agenda with faculty names <p>Also, please scan all the completed participant evaluation forms and e-mail them to Erin Rains at Erin.rains@afpglobal.org</p>

Congratulations and Thank You! Your AFP Fundamentals of Fundraising Course is completed!

The AFP Fundamentals of Fundraising Course 2024

The **AFP Fundamentals of Fundraising Course** was developed with a foundation from the Essentials of Fundraising Program and the First Course and is composed of seven modules that have been designed by experienced fundraising professionals to meet the real-world needs and challenges nonprofit organizations face every day. This 16-hour program includes case studies and projects for groups and individuals, making the learning experience both substantive and enjoyable. The **AFP Fundamentals of Fundraising Course** offers a complete overview of the development function, featuring the most current information and techniques.

This intensive program will provide an overview of skills, techniques, and program components for individuals with 0 to 4 years of fundraising experience.

The modules are:

- Module 1:** Overview of Fundraising
- Module 2:** Developing an Integrated Fundraising Program
- Module 3:** Marketing for Ongoing Success
- Module 4:** Building & Sustaining Relationships
- Module 5:** Securing the Gift
- Module 6:** Volunteers – Partners in Fundraising
- Module 7:** Management & Accountability

Course Location and Cost Information

[Insert Course Information Here, including location, dates, instructors, and cost]

For more information on AFP Global, Professional Development Department, AFP, 4200 Wilson Blvd., Suite 480, Arlington, VA 22203.
<https://www.afpglobal.org>

Course Registration Form

Location and Date: _____

Name: _____

Membership I.D. #: _____

Title: _____

Organization: _____

Address: _____

Phone: _____

Fax: _____

Email: _____

Payment for the **AFP Fundamentals of Fundraising Course** must accompany this form.

- Check Enclosed
- Visa/MasterCard/American Express

Number: _____

Expiration Date: _____

Signature: _____

Please send payment to:
[Enter Chapter information]

2.10 AFP Fundamentals of Fundraising Course Faculty Recommendation Form (Sample)

Whom would you recommend to serve as faculty for each of the following modules? (CFRE or ACFRE is suggested; if you haven't heard the individual speak, please provide the name of a reference for the person's speaking ability; please attach curriculum vitae, or ask the individual to send a curriculum vitae to the AFP Global, Professional Development Department).

Module	Full name(s)	Organization (s)	Street Address	City/State/Zip City/Province/Postal Code
Module I: Overview of Fundraising				
Module II: Developing an Integrated Fundraising Program				
Module III: Marketing for Ongoing Success				
Module IV: Building and Sustaining Relationship				
Module V: Securing the Gift				
Module VI: Volunteers – Partners in Fundraising				
Module VII: Management & Accountability				

2.11 AFP Fundamentals of Fundraising Course Sign-in Sheet (Sample)

Full Name (please print)	Address	City / State/Province / Zip/Postal Code	AFP Member / Non-Member	Email

ASSOCIATION OF FUNDRAISING PROFESSIONALS FUNDAMENTALS OF FUNDRAISING COURSE AGREEMENT 2024

The *AFP Fundamentals of Fundraising Course* is a 16- hour intensive program that will provide an overview of skills, techniques, and program components, and is designed for individuals with up to 4 years of fundraising experience. The course is composed of seven modules that have been designed by experienced fundraising professionals to meet the real-world needs and challenges nonprofit organizations face every day.

The suggested fees for the *AFP Fundamentals of Fundraising Course* are \$419 AFP members and \$529 nonmembers. The course host(s) may change the registration fees but the financial arrangements that follow remain the same.

- **Course Host definition: Sponsoring entity (example – AFP Chapter, University, 501C3, Hospital, etc.) which is going to host the course after agreeing to the Authorized Provider requirements.**

Note: A deposit fee of \$1,000.00 in U.S. dollars must be received once the decision has been made to host the course to cover faculty and participant product. The deposit should be provided as early as possible; but it must be received no later than 60 days prior to the planned start date of the Course, or the course will not be conducted as scheduled. If a deposit is not received, and the course is cancelled after receiving faculty/participant materials, the course host(s) will receive an invoice for shipping and fulfillment and will be required to return all materials to AFP IHQ. Once paid, the deposit is not returned in the event of a cancellation but rather applied to a future course.

Financial Arrangements

All expenses related to the course (meeting room, meals, breaks, faculty travel expenses, faculty gifts) will be paid by the course host(s). The course host(s) may charge course registrants a fee higher than the normal course fee if extra funds are needed to cover expenses related to supplementary meals or functions (e.g., a special reception, full breakfast, exhibit hall, etc.). Materials being shipped to Mexico or Canada will incur separate shipping fees. After the requested participant manuals are shipped, if the host chapter requests additional copies, the chapter will be charged the cost of shipping the additional copies. The host is responsible for the costs related to return shipping of unused participant manuals. Chapters may retain unused participant manuals for use in future classes; but will be charged \$50/each; redeemed when used in that future class. All payments to AFP Global must be made in U.S. dollars, by credit card or check from a bank account in U.S. Dollars. Exceptions may be made at the discretion of AFP Global.

AFP Chapters have the option of hosting the course as a Joint Venture OR a Franchise Fee. These options are described in more detail below:

Joint Venture - Can be offered in conjunction with AFP GLOBAL by any sponsoring entity.

The course host(s) will collect the registration fees, and will reimburse AFP GLOBAL \$209 member/\$269 non-member per participant. This course includes electronic faculty materials, blank badge stock with AFP logo, completion certificates, course roster sign-in sheets. Participant Manuals are in hardcopy. Unused participant manuals retained by the course host will be invoiced at \$50 each. If returned, the host is responsible for return shipping.

Non-AFP Member Third Party Franchise Fee – Can be offered by a non-AFP Chapter or Non-Business Member

The third-party franchise fee is \$5,000.00 per one-time use of the *AFP Fundamentals of Fundraising Course*. The course host(s) will collect all course registration fees. The course host(s) will payout \$5,000.00 plus \$50.00 per participant. This course includes complimentary electronic faculty materials, electronic copies of blank badge stock with AFP logo, electronic copies of completion certificates, and course roster sign-in sheets.

Course Host(s) Responsibilities:

- Completing, signing and submitting the Agreement form, along with \$1,000 deposit (at least two months prior to the planned start date on the Agreement Form),
- Providing a street address and not a PO Box for manuals. Shipments to you will come either UPS or FedEx; and neither can deliver to a PO Box.
- Selecting faculty
- Registering participants; collecting registration fees
- Selecting a meeting facility and making on-site food and beverage arrangements
- Marketing the program
- Designating an on-site coordinator to greet participants, introduce faculty, and handle other on-site logistics for the course
- Disperse faculty materials to individual faculty once materials are received from AFP Global
- Prepare and distribute AFP name badges and AFP certificates of completion to participants
- Distribute a participant manual to each participant, for use during and after the class as an ongoing reference
- Return all unused course materials to AFP GLOBAL (paying for the shipping), or pay for them if retained for future use at the AFP GLOBAL specified price
- Return **ALL** signed non-disclosure forms to AFP Global

AFP GLOBAL Responsibilities:

- Reviewing course faculty
- Providing course materials to course host(s) In electronic form: Faculty Manual, PowerPoint Slides, non-disclosure agreement, blank badge sheets, certificates, and sign-in sheets. In print form: Participant Manual

*Please see the *AFP Fundamentals of Fundraising Course* Host Toolkit for more detailed information on the responsibilities of AFP GLOBAL and the course host(s).

Intellectual Property (IP) - Authorized Provider

An Authorized Provider is a Course host - Sponsoring entity (example – AFP Chapter, University, 501C3, Hospital, etc.) that has a signed Authorized Provider Agreement with AFP GLOBAL to provide AFP instructional programs in accordance with the standards and objectives of the program they desire to teach. An approved Authorized Provider Agreement must be on file with AFP GLOBAL before you can host AFP GLOBAL courses. There is no fee, except where noted, to become an Authorized Provider. Becoming an Authorized Provider permits you to offer the specific AFP course on a one-time basis. Each time you wish to host an AFP course, you must sign on to another Authorized Provider and Course Agreement. As an Authorized Provider, you adhere to the fact that offering this course and/or any of the content within the course without previously signing a Course Agreement with AFP GLOBAL is against AFP GLOBAL standards and ethical codes. Similarly, such an organization (or individual) may not make copies of the manuals or other course materials without the express written approval of AFP IHQ. AFP GLOBAL has the official rights to this course and has the right to refuse your agreement due to instances that would/have broken the authorized provider regulations.

By signing this agreement, you agree to offer this course as an Authorized Provider and therefore adhere to the above statement.

Completing the Required Forms

Please **type** into the next two pages (in Word) the needed information; and then, secure the signature(s) of the authorizing individuals.

IMPORTANT NOTE: BEFORE PLANNING THIS COURSE, PLEASE MAKE SURE YOU HAVE REVIEWED THE COMPLETE FUNDAMENTALS OF FUNDRAISING COURSE 2018 HOST TOOLKIT.

AFP Fundamentals of Fundraising Course Host Agreement Form

I hereby acknowledge that I understand the following:

1. That course materials provided for the *AFP Fundamentals of Fundraising Course* are the exclusive property of the Association of Fundraising Professionals (AFP).
2. This agreement does not imply a license or right, whatsoever concerning the intellectual property of AFP. For the purposes of this Agreement, “intellectual property” shall mean: all trademarks and service marks registered and/or used by AFP, as well as any right, invention (patented or not), industrial designs, utility models, confidential information, commercial names, commercial signs, copyrights, domains, as well as any other intellectual property right protected by law.
3. The course materials are the exclusive property of AFP and are protected by federal copyright law. They are for **one-time use** of faculty members for purposes of teaching the *AFP Fundamentals of Fundraising Course*, and they, and any other form of intellectual property of AFP, may not be reproduced or used for any other purpose without the written permission of AFP.

Print Name

Signature

Course Location

Date

Please sign and return this form to:
AFP Global, Professional Development Division
4200 Wilson Blvd., Suite 480
Arlington, VA 22203
Erin.rains@afpglobal.org

AFP Fundamentals of Fundraising Course Standards and Guidelines for Faculty

As an AFP Fundamentals of Fundraising Course instructor, I agree to:

- deliver the course content as it is presented in the faculty manual. I understand that, time permitting, I may make a personal observation so long as I clearly state it is my own opinion and not that of AFP. If I am unable or unwilling to facilitate this course as it appears in this manual, I will withdraw from any faculty assignments affected.
- use the faculty materials only for an authorized, contracted AFP Fundamentals of Fundraising Course. This agreement does not imply a license or right, whatsoever concerning the intellectual property of AFP. For the purposes of this Agreement, “intellectual property” shall mean: all trademarks and service marks registered and/or used by AFP, as well as any right, invention (patented or not), industrial designs, utility models, confidential information, commercial names, commercial signs, copyrights, domains, as well as any other intellectual property right protected by law. The course materials are the exclusive property of AFP and are protected by federal copyright law. They, and any other form of intellectual property of AFP, may not be reproduced or used for any other purpose without the written permission of AFP Global.
- avoid any appearance of commercialism. I understand that this program is an educational event, not a sales or marketing platform. I agree that my presentation will be an objective review of the topic on which I am presenting, and will not contain any content that is a sales or promotional pitch for any specific product(s), service(s) or company(ies), including my own, particularly those that may compete with AFP.
- refrain from making any statements contrary to the best interests of AFP.

Print Name

Signature

Date

Please return this signed form as soon as possible by e-mail or regular mail – directly to the Site Coordinator for the upcoming course offering, who will forward it to AFP Global.