

Overview

This defines the standard for planning and co-ordinating fundraising in the organisation. You must be able to assess what the fundraising objectives of the organisation are, the methods available, and their suitability. Objectives could be both long- and short-term.

You must also be able to co-ordinate fundraising across the organisation to optimise income. This involves making sure all those involved in the fundraising have the information, resources and support they require. You will need to be able to monitor the fundraising to see if targets will be met and to improve fundraising practices.

This standard is for anyone who has the responsibility for planning and implementing fundraising in their organisation.

Performance criteria

You must be able to:

- P1 clarify the aims of fundraising and produce objectives which are realistic and meet the requirements of the organisation
- P2 communicate the aims and objectives of fundraising clearly
- P3 identify and evaluate potential fundraising methods and activities for their effectiveness
- P4 ensure that potential fundraising methods and activities are in line with the values and policies of the organisation
- P5 identify legal and other implications which affect different fundraising methods and activities
- P6 decide on suitable fundraising methods or activities to meet the objectives
- P7 identify the actions which the organisation needs to take and the resources required
- P8 identify whether contributors should be recognised and how this should be done
- P9 identify any factors affecting the flow of funds and assess the potential impact on the organisation
- P10 maintain effective communication with staff and other stakeholders
- P11 clarify the tasks, responsibilities and timescales with those involved in the fundraising
- P12 ensure those carrying out the fundraising have the resources and support needed
- P13 provide those involved with suitable opportunities to discuss and explore fundraising and their role in greater depth
- P14 assist those involved to develop their skills in fundraising and to think through new ideas
- P15 monitor fundraising activities and methods for effectiveness in meeting targets
- P16 take the appropriate action if there are differences between actual and targeted income
- P17 use lessons from fundraising to improve practices

Knowledge and understanding

You need to know and understand:

- K1 the purpose of the organisation and what it is aiming to achieve
- K2 the values of the organisation and how these may have an effect on the fundraising methods and activities
- K3 how to set aims and objectives for fundraising
- K4 how and where to access information on fundraising methods and activities
- K5 factors which need to be considered when deciding on fundraising methods and activities (e.g. political aspects, conflict of values)
- K6 legal requirements and codes of practice which affect different fundraising methods and activities
- K7 advantages and disadvantages of different fundraising methods and activities
- K8 the resources required to carry out the fundraising
- K9 financial planning and the impact of this on resourcing
- K10 ways in which contributors could be recognised
- K11 the importance of involving staff and other stakeholders in the fundraising process
- K12 the relationship between fundraising and the effectiveness of the organisation
- K13 how to prepare and deliver briefings on fundraising plans and to support those involved in their delivery through development activities including support, advice and training
- K14 how to manage rejections constructively and learn from the experience
- K15 how to monitor income generated and costs of fundraising against plans
- K16 action to take if fundraising is more or less successful than anticipated
- K17 options for amending fundraising plans to achieve balanced income streams for an organisation

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