

## Course Objectives:

The course objectives for **The AFP Fundamentals of Fundraising Course** represent the "big picture" overview of the course. Under these objectives, for each course module there will be additional learning objectives that will lead to accomplishment of these overall course objectives.

### Module 1: Overview of Fundraising

A big-picture look at professional fundraising, including the important role philanthropy plays in organizations and key motivations behind why people give. Also included: the primary sources of contributions; what an integrated development program looks like and which essential components aid success; the fundraising profession as a career, focusing on key qualities for success and a basic path for personal and professional development in the field; an introduction to professional standards and ethics.

Objectives: After this module, you'll be better able 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.
- Describe the essential components of an integrated development program and the primary purpose of each one.
- State key qualities that every fundraiser should possess and describe a basic path for personal professional development.
- Describe the key principles of the *Donor Bill of Rights* and the *AFP Code of Ethics*.

### Module 2: Developing an Integrated Fundraising Program

To effectively raise funds for an organization's mission, it's important to have a comprehensive plan in place that articulates the organization's case for support and includes appropriate giving opportunities. This module covers the importance of connecting that comprehensive plan with the organization's overall mission and strategic plan. The module features an overview of campaign types (annual giving, major gifts, planned giving) with a focus on the key role of annual giving. Content will include establishing/ensuring that appropriate policies and procedures are in place to both ensure integrity of donor intent and to honor donors/volunteers in appropriate ways.

Objectives: After this module, you'll be better able to:

- Discuss the relationship between the organization's overall mission and strategic plan and the development plan.
- State the reasons for coordinating the budgeting and planning process of the fundraising department with that of the overall organization.
- Define elements in background information and in the case for support that will have the most appeal to appropriate stakeholders, both emotionally and rationally.
- Describe the essential components of an integrated development program.

- Identify stakeholders typically affected by a development plan.
- Distinguish the differences between and uses for annual giving, major gifts, and planned giving.
- Describe the key characteristics of individual and group solicitations, and when each is most effectively used.
- Define the reasons for and differences between gift acknowledgement, acceptance, and recognition policies.

### **Module 3: Marketing for Ongoing Success**

Communicating information about fundraising activities to appropriate audiences (donors and prospects alike) and keeping all stakeholders informed about the organization's progress is critical to ongoing and future success. Effective marketing is a key part of building and sustaining relationships for fundraising purposes. This module will cover creating a plan for marketing and communications activities that support development goals and strategies. It will also touch on the growing roles and importance of the Internet and social media in fundraising.

Objectives: After this module, you'll be better able to:

- 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 decisions.
- Describe the roles of the Internet and social media in fundraising.

### **Module 4: Building & Sustaining Relationships**

Relationships are the key to fundraising success, and successful relationships start with knowing current and prospective donors well. This module will introduce the powerful role of prospect and donor research, including identifying and segmenting prospects and donors according to appropriate variables as well as effective donor records management to support ongoing relationships. Finally, cultivation, establishing and maintaining relationships with individuals and organizations, and optimizing relationships to retain donors rounds out the module.

Objectives: After this module, you'll be better able to:

- 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.
- Describe examples of effective cultivation strategies and identify steps to use to maximize gift return on an ongoing basis.
- Identify the basic elements of good relationships with volunteers, donors, and qualified prospects.
- 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 policies and practices.

### **Module 5: Securing the Gift**

Once the development plan is in place and appropriate policies and procedures are set up, it's time to actively solicit gifts from donors and prospects. In this module, a closer look will be taken at solicitation strategies for campaign types, focusing most closely on solicitation techniques for annual giving. Additionally, there will be an overview of techniques for soliciting major and planned gifts. Special emphasis will be placed on implementing critical acknowledgement, acceptance, and recognition practices.

Objectives: After this module, you'll be better able to:

- Describe solicitation techniques used in annual giving programs.
- Identify, recruit, and prepare the appropriate mix of volunteers, staff, and professionals to carry out solicitations
- Name the additional training needs for volunteers involved in solicitation.
- Discuss the six steps to a "model" major-gift solicitation.
- List strategies for obtaining support from corporations/businesses, foundations, and government entities.
- Describe the process for developing and presenting a written grant proposal.
- Discuss application of appropriate acknowledgement, acceptance, and recognition policies and practices.

### **Module 6: Volunteers - Partners in Fundraising**

Fundraising just wouldn't be possible without dedicated volunteers supporting the organization's efforts. Establishing and maintaining a respectful relationship with volunteers is both art and science, beginning with how they are recruited. This module will explore effective ways volunteers can be recruited, trained, managed, motivated, evaluated, and recognized. As importantly, there are times when volunteers are best included in the development process to ensure they experience a sense of ownership in the organization's work and can effectively perform their roles.

Objectives: After this module, you'll be better able to:

- 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.
- Describe a model volunteer orientation program.
- Explain the board's role in fundraising.
- Describe methods for recognizing volunteers.

## **Module 7: Management & Accountability**

Fundraising is about more than soliciting donors and prospects, and the development office is responsible for managing the development plan. This module will present an overview of the management aspects of fundraising including budgeting, records management, gift processing, program evaluation, and the key roles and responsibilities of staff and volunteer leadership. The module ends with a look at accountability, basic legal requirements, and fundraising ethics in practice.

Objectives: After this module, you'll be better able to:

- Participate appropriately in the organization's budget and planning process.
- Describe key considerations in receiving, accepting, recording, acknowledging, tracking, and reporting gifts and pledges.
- List the primary roles and responsibilities of the board, CEO and development officer.
- Discuss methods for evaluating development program performance.
- Identify basic accounting and tax requirements that apply to gifts and pledges.
- Discuss the relevant legal, regulatory, and ethical requirements for information maintained in a donor database, and state potential sources for this information.