Competence Framework

This section gathers together all the knowledge and competencies that fundraisers require in order to maximise fundraising and ultimately to improve the effectiveness of their organisations.

It will help you to design an appropriate training module.
The Competence Framework (CF) is divided into four major parts:
● Key Area 1 (CF 1): Communicating a Case for Support
● Key Area 2 (CF 2): Managing Resources for Fundraising
● Key Area 3 (CF 3): Managing Fundraising
● Key Area 4 (CF 4): Managing People

Case for Support

The case for support is an important document which is prepared at an early stage of any fundraising development activity. It presents the rationale for supporting a fundraising campaign or project. This carefully prepared document should present the reasons why an organisation needs and merits financial support. It is one of the most compelling tools an organisation can have in communicating its fundraising objectives and in persuading prospective donors to make a commitment.

A case for support is a central element based on the the mission, the vision and the values of the organisation. It enables each fundraiser to find the right positioning, the right fundraising strategy to communicate to the right audience, with the right technique.

The case for support brings together in one document the fundamental elements of your mission and your project.

To be effective, the case must be valid and dynamic, creating enthusiasm and emphasising what the proposed fundraising will accomplish. It must be stated in terms that reflect the interests and concerns of potential supporters, as well as those of the project itself. The case addresses important questions such as: What is the need? Why are we raising funds? What is the best and simplest solution? How to make the change?

It should answer the initial questions that any potential supporters might have. One organisation can have several cases for support. Fundraisers should work to develop an appropriate case for each target audience.

Key Area 1 (CF 1): COMMUNICATING A CASE FOR SUPPORT

CF 1.1: IDENTIFY AN ORGANISATION'S FUNDRAISING REQUIREMENTS

Requirement

In order to develop effective fundraising strategies it is vital to understand the organisation and reasons for fundraising. Fundraisers should demonstrate an understanding of their organisation in relation to the charity/voluntary sector and of the link between its service provision and its fundraising requirement.

Performance Criteria

Fundraisers should be able to:
a) Describe the organisation's primary purpose and mission
b) Demonstrate how the organisation's legal and constitutional powers impact upon its fundraising potential
c) Identify the costs of current organisational needs and service programmes
d) Describe the organisation's branding strategy
e) Identify fundraising objectives

Fundraisers should demonstrate knowledge of:

- Information sources to identify an organisation's fundraising requirements
- The importance of maintaining the organisation's identity
- Tools for analysis

CF 1.2: ESTABLISH A CASE FOR SUPPORT

Requirement

Fundraisers should produce a case for support for a specific event or campaign. These should be based on the organisation's mission and when applicable on a larger campaign.

Performance Criteria

Fundraisers should be able to:
a) Identify relevant stakeholders and their needs
b) Prepare a case for support that emphasises the facts and benefits of the proposal
c) Recognise the benefits/limitations of the fundraising event/campaign proposed

Fundraisers should demonstrate knowledge of:

- Donor relationships, their motives and roles, approaches to asking for money
- Materials and time
- Established methods of fundraising
- Creating case statements for support
- Issues, policies, legislation and regulations within the fundraising sector
- The principles of ethical fundraising

CF 1.3: COMMUNICATE A CASE FOR SUPPORT

Requirement

How a fundraising proposal is presented and to whom will have a major effect on the likelihood of success. Fundraisers should demonstrate their knowledge of a range of communication skills in written, verbal, audio, video or other format and justify its use.

Performance Criteria

Fundraisers should be able to:
a) Prepare a campaign for a discrete piece of work
b) Select the communication method most appropriate to the needs of the campaign
c) Demonstrate effective communication skills when preparing a publicity programme
d) Follow the organisation's communication policy (or good practice) when preparing a publicity programme

Fundraisers should demonstrate knowledge of:

- The range of methods and media required to communicate arguments and the reasons for the campaign
- Support to different audiences
- Different methods for communicating the fundraising case
- The relative cost benefits of reaching individuals through different communication media
- The psychology of communication

Key Area 2 (CF 2): MANAGING RESOURCES FOR FUNDRAISING

CF 2.1: RESEARCH AND ANALYSE INFORMATION TO SUPPORT AN ORGANISATION'S FUNDRAISING STRATEGY

Requirement

Research is vital to any successful fundraising operation. Fundraisers should demonstrate that the fundraising strategy is based on well-researched, up to date information. Fundraisers should research and analyse the organisation's stakeholders, identifying their motivations and linking this to a range of fundraising activities. Research should be carried out using a variety of methods.

Performance Criteria

Fundraisers should be able to:
a) Identify the organisation's stakeholders and their needs
b) Analyse information regarding the current and future fundraising environment
c) Analyse sources of historical income
d) Analyse information to identify potential sources of financial support

Fundraisers should demonstrate knowledge of:

- Research and analysis methodologies
- The management of data
- Competitor analysis
- The motivational needs of a range of stakeholders
- The external fundraising environment
- A range of fundraising techniques
- Criteria for selecting appropriate fundraising programmes/campaigns
- Creating and maintaining donor records and databases

CF 2.2: PLAN, ORGANISE AND ALLOCATE RESOURCES FOR FUNDRAISING

Requirement

No fundraising operation will succeed without a clear and structured plan. Fundraisers should demonstrate how the fundraising event/campaign will be developed into an executable operation.

Performance Criteria

Fundraisers should be able to:
a) Identify the fundraising objectives of the event/campaign
b) Establish a level of cost effectiveness acceptable to the organisation
c) Create a time-scaled plan of resource allocation linked to a specific fundraising event/campaign
d) Create an income/expenditure forecast based on the proposed fundraising plan
e) Organise resource allocation to ensure that expenditure does not compromise the organisation's financial procedures.
f) Identify particular elements of the fundraising plan that are to be serviced by a supplier
g) Gain approval for the fundraising plan

Fundraisers should demonstrate knowledge of:

- Planning techniques
- Budgetary control systems and forecasting
- Objective setting

CF 2.3: MANAGE A PRODUCTIVE WORKING RELATIONSHIP WITH SUPPLIERS

Requirement

Fundraisers should demonstrate how and why suppliers are used to support the fundraising operation. The term supplier should generally be interpreted as a third party who is providing a service in support of the fundraising plan. This might be internal (another individual or department within the organisation) or external (another organisation).

This requirement does not demand evidence of formal contract management skills in establishing contracts with suppliers. However, it does require that, at the minimum, the candidate has prepared a brief or specification that will lead to the formulation of an agreement with an internal or external supplier.

Performance Criteria

Fundraisers should be able to:
a) Identify the roles and responsibilities of suppliers within a discrete piece of work
b) Prepare a brief for a discrete piece of work to be provided by the supplier
c) Maintain accurate and complete records of the suppliers' contribution
d) Liaise with and co-ordinate the work of suppliers
e) Evaluate the service provided against the original criteria

Fundraisers should demonstrate knowledge of:

- Selecting, briefing and working with suppliers
- Writing specifications
- Evaluation techniques
- Fundraisers who are suppliers should demonstrate how they respond to the fundraising plan

Key Area 3 (CF 3): MANAGING FUNDRAISING

CF 3.1: DEVELOP A FUNDRAISING STRATEGY

Requirement

To provide a fundraising operation that meets the needs of the whole organisation depends on developing fundraising strategies closely aligned to organisational objectives. The fundraising strategy should not focus simply on fundraising plans for individual pieces of work. Rather it should take a holistic view of the contribution of fundraising to the attainment of the organisation's overall objectives.

Performance Criteria

Fundraisers should be able to:
a) Design a fundraising strategy, within the specific area of responsibility
b) Identify those required to implement the fundraising strategy
c) Identify barriers to fundraising
d) Establish an ethical framework for fundraising
e) Demonstrate how the fundraising strategy is informed by business objectives
f) Prepare an action plan describing how the fundraising strategy will be implemented
g) Analyse any risk involved in implementing the fundraising strategy

Fundraisers should demonstrate knowledge of:

- A range of fundraising techniques
- Criteria for selecting appropriate fundraising programmes/campaigns
- Issues, policies, legislation and regulations of the fundraising environment
- Issues and principles of ethical fundraising
- Factors to consider when formulating strategic/operational business plans
- Objectives, targeting potential supporters/resources/facilities
- The effective use of human and other resources

CF 3.2: PROBLEM SOLVING

Requirement

Fundraisers should demonstrate competence by using recognised methods and techniques to resolve problems associated with the fundraising strategy.

Performance Criteria

Fundraisers should be able to:
a) Identify and articulate problems associated with the fundraising strategy
b) Analyse key issues to identify their cause
c) Apply established techniques designed to solve clearly identified problems
d) Generate options based on systematic and rational judgments using a creative approach
e) Evaluate options and make recommendations for the resolution of the problem

Fundraisers should demonstrate knowledge of:

- Creative techniques for problem solving

CF 3.3: IMPLEMENT THE FUNDRAISING OPERATION

Requirement

Fundraisers should demonstrate that they have delivered the fundraising plan, that the fundraising methodology has been consistently applied and that the appropriate legal obligations have been fulfilled.

Performance Criteria

Fundraisers should be able to:
a) Apply fundraising methods appropriate to the situation
b) Integrate the legal requirements appropriate to the fundraising activity into the fundraising operation
c) Monitor and manage targets

Fundraisers should demonstrate knowledge of:

- Established methods of fundraising
- Issues, policies, legislation and regulations within the fundraising sector
- Ethical issues relevant to fundraising activity
- Codes of practice and other relevant material

CF 3.4: EVALUATE THE EFFECTIVENESS OF THE FUNDRAISING STRATEGY

Requirement

Fundraisers should evaluate and consolidate past and present fundraising performance and demonstrate that fundraising has met the organisation's current needs. Evaluation and consolidation should be undertaken not simply in the context of the fundraising process itself but also from a broader organisational perspective.

Performance Criteria

Fundraisers should be able to:
a) Describe how the motivational needs of the supporter (individual, corporate or otherwise) have been reconciled through the fundraising strategy
b) Assess the non-financial contribution of fundraising to the attainment of organisational objectives
c) Identify the outcomes of the fundraising strategy
d) Recommend changes to the fundraising strategy
e) Forecast the future contribution of fundraising

Fundraisers should demonstrate knowledge of:

- Evaluation techniques
- The nature of change

CF 3.5: EVALUATE THE EFFECTIVENESS OF FUNDRAISING

Requirement

Fundraisers should be able to show that fundraising activities meet the objectives identified in the fundraising strategy and that the cost benefit ratio of the campaign is acceptable.

Performance Criteria

Fundraisers should be able to:
a) Identify the level of cost effectiveness of the fundraising event/campaign
b) Assess the effectiveness of a fundraising event/campaign
c) Make recommendations for the future

Fundraisers should demonstrate knowledge of:

- Evaluation techniques

CF 4.1: SELF-MANAGEMENT

Requirement

Fundraisers should know what makes them an effective member of a fundraising team.

Performance Criteria

Fundraisers should be able to:
a) Collaborate with colleagues to achieve common goals
b) Communicate effectively with others
c) Display effective and efficient prioritisation skills
d) Identify opportunities to establish productive relationships with volunteers and others (COUPES)
e) Demonstrate awareness of the boundaries of their role

Fundraisers should demonstrate knowledge of:

- Team working
- Communication skills
- Working with volunteers
- Skills of prioritisation
- Equal opportunities
- The role of the fundraiser in the organisation

CF 4.2: WORKING WITH OTHERS TO ACHIEVE ORGANISATIONAL OBJECTIVES

Requirement

Fundraisers should demonstrate their ability to work effectively with a range of staff, volunteers, stakeholders and donors to achieve the fundraising objectives.

Performance Criteria

Fundraisers should be able to:
a) Induct others into the fundraising operation
b) Delegate appropriate tasks to others
c) Adapt their working style to enable others to perform effectively
d) Involve others in the decision-making process
e) Review the performance of others

Fundraisers should demonstrate knowledge of:

- Principles of team roles and working
- Leadership styles
- Delegation and empowerment
- Motivation theory as it relates to individuals, groups, staff and volunteers
- Principles of constructive feedback
- Negotiation skills

-