



EFA Certification

Advanced Competence Framework

First edition

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FOREWORD

Fundraisers everywhere across Europe enter this profession because they want to make a difference, and develop a career in a sector where this is the primary focus.

For success, being equipped with the right skills and competencies is essential. This is a fast-moving world, where people's preferences, behaviours and needs, as well as technology, legislation and more are ever changing. As such, access to ongoing professional training and development is of the utmost importance to ensure that every fundraiser is able to respond to the challenges and opportunities that arise.

And, as careers develop, further education and training of an equally high standard is also essential for helping new leaders finetune the skills and competencies necessary for getting the very best out of their teams and organisations.

Since the 2007 launch of our EFA Standard Certification Framework, over 6,250 fundraisers in 14 countries have already completed EFA Certified courses. Many of those – and other fundraising professionals – will now be ready to take the next step into leadership.

This is where the new EFA Certification Advanced Competence Framework will play a vital role. Focusing on the management of fundraising functions and leading a fundraising organisation, it covers everything from strategic fundraising planning skills to team management.

As such, it enables dedicated educational programmes to be established that support fundraising professionals on their leadership journey, helping them develop, and be assessed on, the skills and competencies required to lead and manage a successful and contemporary fundraising operation.

We would like to thank everyone who has contributed their valuable time and expertise to the development of our two Frameworks. In developing this Advanced Competence Framework, the input received from EFA delegates and educational providers as well as from our members, and of course our Certification Committee, has been invaluable.

And, for associations and organisations that are considering developing fundraising qualifications, we hope that this handbook will help you to advance fundraising training in your country and inspire more fundraising practitioners to further their knowledge and skills.



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EFA President



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Chair of EFA Certification Committee

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INTRODUCTION

At EFA, our mission is to strengthen and develop fundraising across Europe and our Certification scheme – the first European qualification framework for fundraising – is a core part of that work programme. EFA Certification was first launched in 2007, developed with EU funding and modelled on the Institute of Fundraising's Certificate in Fundraising Management. Fundraising and academic experts from 15 nations fed into its creation, with the goal of establishing a European standard for fundraising qualifications, raising the bar and helping practitioners to become successful and resourceful fundraisers. The Certification scheme enables fundraising associations to develop qualifications that share one core syllabus and a set of fundraising competencies, while reflecting the cultural, economic and geographic backdrop of the national fundraising environment.

In 2018, after over a decade of change and with increasing appetite for professional fundraising development, a revision of the EFA's Certification scheme was initiated with the aim to ensure it reflects the growing social impact of philanthropy, advances in technology, new fundraising channels and trends, as well as changes to regulation and best practice. The review, led by Professor Adrian Sargeant, included in-depth interviews with European fundraisers and academics, a survey of the alumni who had completed EFA Certified training courses and dedicated symposiums to agree key areas of change, with EFA's Certification Committee working to finalise the details of the new programme.

As a result of the review a proposal for an Advanced EFA Competence Framework was also put forward. At the EFA Symposium in June 2019, where the new revised framework was first presented, the idea of also providing an advanced framework was well received by the delegates who clearly indicated there is a need for a framework which provides an educational programme focused on the management of fundraising functions and/or leading a fundraising organisation. The Certification Committee and the EFA Board decided to prioritize moving ahead with the standard competence framework, which was launched in September 2020.

The Certification Committee then began to work on the Advanced Framework, again starting with input from EFA delegates and educational providers, with ideas shared and discussed at the EFA Certification Symposium in 2021, which led to further refinements. Following a further year of work, the Advanced Framework is ready for launch in the autumn of 2022, and we eagerly await the first new certified courses under this framework.

ADVANCED FRAMEWORK – AREAS OF COMPETENCE

Fundraising Leadership Competencies

The “Fundraising Leadership” competencies are organised in groups:

CF6.0: Strategic Fundraising Planning and Control

CF7.0: Managing a Fundraising Organisation

CF8.0: Developing a Philanthropic Society

CF9.0: MODULAR CHOICE – Managing Capital Campaigns, Major Donor or Legacy Programmes

The leadership competencies are written to equate with Levels 5/6 in the European Qualification Framework. The detail is provided in Figure 1. As with the regular EFA Certification Framework, providers wishing to gain EFA accreditation should demonstrate a minimum of 70% coverage of the units outlined below. This leaves room for adapting the programmes to national needs and cultural aspects.

[Figure 1: Fundraising Leadership Competencies](#)

Fundraising Leadership Competencies

CF6: Strategic Fundraising and Control

CF6.1: Conducting a Strategic Fundraising Audit

CF6.2: Strategic Fundraising Planning

CF6.3: Resource Planning and Control

CF7: Leading a Fundraising Organisation

CF7.1: Managing Fundraising Teams

CF7.2: Leading Integrated Communications

CF7.3: Developing a Philanthropic Culture

CF7.4: Driving Fundraising Innovation

CF8: Developing a Philanthropic Society

CF8.1: Promoting Transparency and the Public Trust

CF8.2: Broadening Participation in Giving

CF8.3: Transformational Philanthropy

CF9: MODULAR CHOICE – Managing Capital Campaigns, Major Donor or Legacy Programmes

CF6.0: Strategic Fundraising Planning and Control

The first cluster of the management competencies focuses on strategic fundraising planning. In this cluster the focus is on planning the whole organisation's fundraising and thus the aggregate strategy that will be adopted. Fundraising managers will be expected to develop objectives for the fundraising function as a whole that are consistent with organisational needs. They must also be able to develop fundraising strategy that is capable of achieving the stated objectives. In doing so they will demonstrate competence in designing, implementing and managing a portfolio of fundraising activities. They are also expected to develop processes, procedures and metrics for providing strategic control of these activities and for appropriately stewarding the organisation's resources.

The focus of activity in this cluster is largely the generic set of competences associated with strategy formulation, implementation and control, but included is also a separate set of competencies associated with management and strategic planning. The execution of capital campaigns, major donor or legacy programmes is part of Module CF9 intended as a choice of one of the three, whatever is deemed to be most relevant or applicable.

CF6.1: Conducting a Strategic Fundraising Audit

Requirement

Fundraising managers should be able to conduct a strategic fundraising audit. Such an audit can be the first component of a strategic fundraising plan, or it can be a control mechanism for assessing the organisation's current strategy and fit with the fundraising environment, both external and internal. Fundraising managers should be able to critically evaluate the health of their current fundraising strategy and make informed recommendations for change if and when necessary.

Underpinning Knowledge

The purpose of a strategic fundraising audit, structure and content. Use of audit mechanism as a strategic control.

External fundraising audit: PESTLE Analysis, competitor analysis, collaborative analysis, market analysis/research, supporter/stakeholder analysis.

Fundraising Strategy Audit: Methods of assessing the appropriateness and effectiveness of current objectives and the strategic approach. Portfolio management. Analytical tools e.g. product/service lifecycle, nonprofit portfolio analyses, advantages/disadvantages of a range of portfolio models. Underlying assumptions.

Fundraising Organisation Audit: Methods of assessing the structural capability of the organisation and its suitability for implementing the strategy needed for the developing environment. Structural types and associated strengths/weaknesses.

Fundraising Systems Audit: Methods for assessing the quality of the organisation's systems for analysis, planning and control. Systems for payment processing, acknowledgement, stewardship etc.

Fundraising Productivity Audit: Methods for evaluating fundraising cost-effectiveness. Performance of fundraising by expenditure level.

Fundraising Functions Audit: Methods for the strategic evaluation of each form of fundraising.

SWOT Analysis: strengths, weaknesses, opportunities and threats analysis, methods of prioritising factors, interpretation of findings. Threat matrix

CF6.2: Strategic Fundraising Planning

Requirement

Fundraising managers should be able to design, develop and implement a strategic fundraising plan for a focal organisation. They should be able to synthesise information from the audit to derive fundraising objectives consistent with both the needs of their organisation and the constraints of the environment (both internal and external). They should also be able to derive strategies to meet those organisational objectives including the derivation of an appropriate portfolio of fundraising activities. All recommendations should be informed by evidence and consistent with legal and ethical requirements.

Underpinning Knowledge

Planning: benefits and drawbacks of planning, approaches to planning, alternatives to planning, incrementalism, fit of planning process with organisational environment. Planning as a process.

Fundraising objectives: importance of SMART objectives, processes for objective setting, categories of fundraising objectives. Primary and secondary objectives. Relationship between fundraising objectives and organisational objectives and mission/vision. Nature of corporate objectives.

Fundraising strategy: overall direction. Segmentation - *a priori* and *post hoc* approaches. Criteria for evaluating segment viability and attractiveness. Positioning: value proposition, sources of distinctiveness, product positioning matrix. Case for Support: methods for derivation of case for support. Importance of securing institutional buy-in.

The Fundraising Mix: methods for selecting appropriate fundraising activities, channels and products. Best practices in relation to each. Sector benchmarks for performance and associated timescales.

Developing a Fundraising Budget/Plan: methods of budget setting, categories of costs (fixed, variable, joint), behaviour of costs. Accounting for risk and uncertainty.

Scheduling: use of Gantt charts or alternatives.

Monitoring/Control: control defined, control concepts, approaches to control, key fundraising controls, behavioural factors, contingencies, management reports.

CF6.3: Resource Planning and Control

Requirement

Fundraising managers should be able to secure, plan and control the resources necessary to achieve selected fundraising objectives. They should be able to effectively manage risk in the fundraising function, implementing and supervising a range of appropriate controls. In comparison to their more junior colleagues, fundraising seniors should be able to secure proportionally larger and a more diverse set of resources to achieve a more comprehensive set of fundraising objectives. They should also be able to manage more significant risks across a range of fundraising functions, which means that they should be able to implement and supervise a more complex range of controls.

Underpinning Knowledge

Assessing Fundraising Performance: return-on-investment models, post-investment appraisals, actual performance versus objectives, lifetime value models, range of metrics appropriate for each form of fundraising, importance of measuring drivers of longer-term value. Role of stakeholder satisfaction and commitment.

Behaviour of fundraising costs: definitions, differences between fundraising, programme, governance and administration costs (note: categories will vary by jurisdiction), average versus marginal costs, key drivers of fundraising cost, key fundraising ratios and how to calculate them. Weaknesses of such ratios. Principles of effective benchmarking and reporting. Sector benchmarking initiatives – Fundraising Effectiveness Project.

Securing Investment: ROI models, payback period, discounted cash flow, net present value, profitability index and rate of return. How to present a case for investment to a range of stakeholders.

Risk Management: definitions, risk assessment, analysis and evaluation, risk control and treatment and risk communication.

Resource Planning: resource planning techniques, critical path analysis, management reporting.

Management Controls: control defined, basic control concepts, responsibility accounting, approaches to control, controls, behavioural aspects of control, taking corrective action.

CF7.0: Leading a Fundraising Organisation

This cluster of units is concerned with the nature and scope of fundraising leadership. Fundraising managers should be able to lead and manage their own fundraising teams, but they should also be capable of managing their organisations to release the full potential of fundraising. This requires sufficient understanding of how marketing is practiced in other specialisms. In particular, they should understand how campaigning/advocacy and the marketing of service provision is typically undertaken and how organisations manage and leverage their brands. Fundraising managers should be able to speak the same language as colleagues in other functions and be able to identify and exploit opportunities to work collaboratively for the benefit of the whole organisation.

Fundraising managers should also be capable of critically evaluating an organisation's culture, identifying key components that are relevant for fundraising success. They should be familiar with how culture is developed and influenced and (subject to senior management buy-in and agreement) be capable of leading the creation of a philanthropic culture that will support the fundraising strategy and enhance the quality of the supporter experience. Philanthropic culture is dynamic, donor centric, places philanthropy at the heart of the organisation and recognises the contribution the whole organisation can make to donor cultivation, stewardship and development. It is also a culture that is supportive of philanthropic innovation.

CF7.1: Managing Fundraising Teams

Requirement

Being equipped with the knowledge, skills and behaviours to manage and lead in a variety of organisational settings is essential if an individual and their organisation are to succeed. Fundraising managers must understand how to train, lead and motivate their teams. They should be able to recruit, induct, develop, retain and empower/capacity building/ fundraising talent, whether staff or volunteers. They will have a command of relevant theoretical models, management and leadership styles and approaches designed to promote respect of diversity. They should be able to generate mutual trust, respect and support from others.

Underpinning Knowledge

Motivation at work: nature of motivation, the McClelland studies, Maslow's hierarchy of needs, Two Factor Theory, Expectancy Theory, Reinforcement Theory, Equity Theory.

Volunteer motivation: characteristics of volunteers, motives for involvement, barriers to involvement, sources of dissatisfaction, retention strategies.

Conflict: definition, sources of conflict, levels of conflict, strategies for managing conflicts (e.g. increasing constructive conflicts and reducing destructive conflicts), styles of conflict management.

Leadership: definitions, attributes associated with leadership, approaches /aspects of/ to leadership, links between leader behaviour and employee attitudes and performance,

relationship between subordinate maturity and leadership style, decision-making styles, evaluation of leadership styles, leadership models.

Performance Appraisal: reasons for appraising performance, methods of performance appraisal, sources of tension in feedback interviews, elements of a successful feedback interview, characteristics of an effective appraisal system.

Group Dynamics: the nature of groups, types of teams, stages of team development, impact of team properties on performance, team roles. Group decision making, groupthink, group decision-making techniques.

Volunteer and Employee Recruitment and Retention: characteristics of volunteers, volunteer/employee motivation, job descriptions, person specifications, screening, selection methods. Induction, training, and need for further development. Key legal and ethical considerations, equal opportunities, discrimination, importance/role of remuneration. Key reasons for volunteer/employee attrition and strategies for prevention.

CF7.2: Leading Integrated Communications

Requirement

Fundraising managers should be able to develop effective and collaborative working relationships with the managers of other marketing related functions. They should have an understanding of the cultures and professional perspectives of the different functions and be able to lead on the development of an integrated communications plan. They should also understand the relationship between brand and fundraising and how to leverage the brand to boost fundraising success.

Underpinning Knowledge

Integrated Marketing Communications (IMC): communications strategies, objectives, communications mix (including digital communications mix), communications media and best practice in relation to each, communications planning, media neutral planning, benefits of appropriate campaign integration. IMC metrics and control.

Communications Functions: fundraising, campaigning, marketing of services, social marketing, advocacy. Aims, objectives and considerations in the marketing communications mix for each. Media strategy, media budgeting.

Creativity in marketing communications: definitions of creativity, approaches to creativity, management of creativity. Creativity in marketing communications. Creativity processes.

Elements of consumer psychology, perception, motivation, learning, attitudes and behaviour change (with emphases on campaigning and advocacy behaviour). Consumer behaviour analyses.

Branding: definitions, role and nature of a brand. Benefits and drawbacks of branding. Models of brand, approaches to branding, evaluating and enhancing brand value. Brand development and testing, including importance of stakeholder consultation and buy-in. Brand personality and values.

External and internal branding. Stakeholder identification with the stakeholder's map. Strategic brand management.

Working with external agencies: structure of the communications industry, categories of agency, agency selection and evaluation, agency briefing, structure, review, role of key agency personnel, relationship management. How agencies are remunerated.

CF7.3: Developing a Philanthropic Culture

Requirement

Fundraising leaders should understand the nature and role of organisational culture and its impact on fundraising performance. Fundraising managers should also be able to appraise the suitability of a given culture and promote and lead on ideas for appropriate change. They should be cognisant of the role of a philanthropic culture in creating an environment conducive to giving and the effective stewardship of fundraising relationships. They should pay particular attention to how culture can deliver sustainable value for fundraising that formal structures and teams cannot.

Underpinning Knowledge

Orientation: product, sales, market and philanthropic orientation. Components of a philanthropic culture.

Organisational culture: definition, frameworks for understanding culture, typologies of organisational culture, relationship between culture and strategy, impact of culture on performance at individual, departmental and organisational levels.

Working with other stakeholder groups. understanding of the link between organisational structure and fundraising performance. Relevant types and sources of conflict, conflict awareness and management. Negotiation, influence and power.

Organisational Values: values as a key component of culture. The importance of values in underpinning individual and organisational performance.

Influences on Culture: internal and external factors that influence organisational culture, including national cultures.

Managing Change: the principles and methods of managing culture change within organisations.

CF7.4: Driving Fundraising Innovation

Requirement

Fundraising managers should be able to identify and exploit appropriate opportunities for innovation either focused within their organisation or within the sector as a whole. This requires an understanding of the process of innovation, the sources of new ideas and how alternatives might be

evaluated. Fundraising managers should also be able to support their teams in taking necessary and appropriate risks.

Underpinning Knowledge

Innovation: definition of innovation, categories of innovation, the innovation process, the value of innovation in staying competitive and building stronger relationships with existing audiences or developing new ones. Differences between creativity and innovation.

Learning Culture: definition, antecedents and consequences of. Sources of potential learning in the profession of fundraising, national and international. Rewards for learning, leading by example. The role and nature of failure.

Idea Generation: sources of new fundraising ideas. Role of secondary research, competitor benchmarking and formal/informal internal sources. Methods for new idea generation (e.g. brainstorming, quality circles, mind mapping, customer feedback, customer and market research, co-creation, sharing prototypes, data interrogation and analysis, emulation of competitors, supplier/partner involvement, formal suggestion or incentive schemes).

Evaluation Process: process may include but is not limited to research, design, development of business case (including objectives, success criteria and key performance indicators, cost benefit, analysis/investment appraisal, timescales), approvals, developing, pilot/testing, feedback and monitoring.

Securing Investment: identification of decision-makers and influencers. How to develop, document and present proposals.

Managing Innovators: How to show that ideas contributed by others are valued and appropriately recognised. Systems for recognition, remuneration and reward.

CF8.0: Developing a Philanthropic Society

The purpose of this final cluster is to have fundraising leaders reflect on some of the key challenges facing the profession today. The focus of this cluster is on the role fundraising managers can play in bringing about positive change at a system level. Units encourage reflection on what it means to be a fundraiser and the relationship between fundraising and philanthropy as articulated by Bob Payton, Hank Rosso and other culturally appropriate sources. This is expanded into a broader perspective on professional ethics and the impact that fundraisers can have on the public trust.

Units also examine the potential to grow philanthropy by developing new audiences, channels and modes of giving, reviewing the latest trends and critically evaluating extant research in relation to each. The cluster concludes with an examination of how the emerging science of donor psychology might be used to create more meaningful supporter experiences and enhance their wellbeing through truly transformational philanthropy.

CF8.1: Promoting Transparency and the Public Trust

Requirement

Fundraising managers should act in a manner consistent with the development of the public trust. Managers therefore need to understand the nature of trust and its antecedents and consequences. They also need to understand the role of trust in the sector and trust in a focal organisation, why these are different and why they matter. Fundraising managers should also play an active role in stewarding the public trust/confidence through the development of appropriate systems of transparency, professional ethics and self-regulation.

Underpinning Knowledge

Promoting Public Trust and Confidence: definition, distinction between the two terms, determinants of trust in the sector, determinants of trust in a nonprofit organisation, measures to build trust and confidence, importance of transparency/representing fundraising of the organisation to the wider public.

Fundraising Reporting: definition. Importance of accountability and transparency. Adequately communicate the definitions of fundraising costs, fixed/variable costs, methods of cost allocation, definition handling and documentation of joint costs. Accounting and audit requirements appropriate to the focal jurisdiction.

Fundraising ethics: ethical frameworks and codes of conduct and how to critique them. Applied and normative fundraising ethics. Bases for normative approaches to fundraising ethics. Ethical decision-making processes related to fundraising within the organisation. Implications for the relationships with a variety of sector stakeholders. Ethics in the context and definition of a profession.

Fundraising Regulation/Self-Regulation: patterns of regulation and self-regulation. Forms of self-regulation and the strengths and weaknesses of each. Critical evaluation of self-regulatory methods and appropriateness for the focal jurisdiction(s). Role of the fundraising profession in the design, implementation and development of appropriate regimes.

CF8.2: Broadening Participation in Giving

Requirement

Fundraising managers should be able to contribute to national and European debates on how to stimulate philanthropy and grow giving. They should be able to apply a detailed understanding of donor behaviour to offer suggestions for growth in each fundraising market. They should also be able to reflect on both supply and demand side factors with the capacity to grow philanthropy and evaluate their relevance for (and application to) a focal fundraising market.

Underpinning Knowledge

Trends and Issues in Giving: current trends and issues in relation to each major form of giving (individual, corporate and foundation) and segment of supporters. Participation in giving and national

and European trends. Profile of different categories of supporter and potential audiences under-represented in giving.

New and emerging forms of giving: new forms of giving. New fundraising markets/audiences. How different generations differ in their approach to the charitable sector. The social role of the sector in developing a societal culture of philanthropy. Role of government and other agencies in developing giving. Current initiatives to foster giving.

Lessons from other countries: philanthropy in different traditions and cultures, giving patterns, forms of giving. Sources of secondary data on giving from other jurisdictions. Advantages/disadvantages of different forms of research. How to critique a research paper or report.

Government policy and influence: responsibilities of relevant government departments, their policies, and the application thereof. Role of taxation, regulation of fundraising practice, regulation of professional fundraisers.

CF8.3: Transformational Philanthropy

Requirement

The focus of this unit is on transformations. Fundraising managers will be able to optimise philanthropy's transformative function for individuals, groups, organisations and societies. They should be capable of creating and managing approaches to fundraising that genuinely enrich the lives of stakeholders and contribute meaningfully to their personal wellbeing.

Underpinning Knowledge

Transformational Philanthropy: definitions. Applications in the context of mass and major donor philanthropy. Ability of gifts to be transformation for stakeholders and a focal organisation. Nature of transformations and the factors that drive them.

Stakeholder Wellbeing: definitions of wellbeing. Components, antecedents and consequences of wellbeing. How to design communications and interactions that stimulate feelings of wellbeing.

Stakeholder Identity: definition of Stakeholder identity, degrees and types of identities, the value of identity to a non-profit, the meaning of identity to an individual, and how a stakeholder's identity might lead to more behaviours beneficial to the organisation. How beneficial behaviour to the organisation reinforce stakeholder's identity. Key determinants of strong stakeholder identification with an organisation.

Identity fundraising/marketing: principles of identity-based marketing/fundraising, plan stakeholder's identity development, establish stakeholder empowerment programme (as a way of strengthening stakeholder identification with an organisation) and create behavioural transitions of committed involvement within the organisation (during life and after death). Monitoring and evaluation: calculation and interpretation of key identity metrics.

Models of social change: theories of social change – Evolutionary, Cyclical, Economic, Conflict and Technological. How to create change for organisations and society. How to create transformative change for the profession of fundraising.

CF9.0: MODULAR CHOICE - Managing Capital Campaigns, Major Donor or Legacy Programmes

Choose one of the three Items: Capital Campaigns, Major Donors or Legacy Programmes

Requirement

Fundraising leaders should be able to plan a capital campaign, major donor or legacy programmes, working with senior organisational and board leadership guidance (as appropriate for the jurisdiction). They should also be capable of conducting or commissioning an assessment of readiness to test the viability of a campaign or programme. They should then be able to develop systems and procedures to support the campaign or programme and to track and evaluate its effectiveness.

Underpinning Knowledge

Capital Campaigns, Major Donor or Legacy Programmes: definition of capital campaign, major donor or legacy programme, campaign or programme types (comprehensive, traditional bricks and mortar, endowment, project-based, etc). Silent and public phases and activities associated with each.

Campaign Feasibility: constituency, market involvement, gift support history, prospect development plans, systems/record keeping, involvement of board, staff/volunteer capacity, potential for lead gifts.

Planning: strategy, structure, systems, implementation, research, CAP (Capacity, Affinity, Philanthropy) donor evaluation, prospect evaluation programme. Volunteer engagement and management, volunteer and staff roles and responsibilities.

External Counsel: hiring process, management, accountability and feasibility study components.

Campaign Processes: banking, thanking/acknowledgement, criteria for award of naming or other recognition opportunities, processes for donor stewardship and development. Development of campaign policies e.g. gift acceptance policies.

Organisational integration: interdepartmental and programme collaboration, staff/volunteers, ongoing fundraising activities vs. campaign or programme duration.

European Fundraising Association

The European Fundraising Association (EFA) is a network of 21 national fundraising associations and organisations from across Europe working together with the collective goal of raising fundraising standards. Our members represent the national fundraising community in Austria, Belgium, Czech Republic, Finland, France, Germany, Ireland, Italy, Lithuania, Netherlands, Norway, Poland, Slovakia, Slovenia, Spain, Sweden, Switzerland and United Kingdom.

Together, we represent the European fundraising community with one voice, one collective body and one shared goal of facilitating better fundraising. EFA aims to strengthen and develop the fundraising profession across Europe.

We welcome applications from national fundraising associations and organisations to join our member base. For enquiries about EFA's membership services, please contact info@efa-net.eu

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