



# **EFA Certification Advanced Framework Programme Delivery and Assessment Guidelines**

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## CONTENTS

<b>PROGRAMME DELIVERY GUIDELINES .....</b>	<b>3</b>
<b>ASSESSMENT GUIDELINES .....</b>	<b>6</b>

## PROGRAMME DELIVERY GUIDELINES

Study for an EFA Certified Fundraising Training Programme requires a serious commitment from candidates. Those successfully completing courses will be capable of designing and implementing a fundraising programme and providing others with the support necessary to be able to fundraise effectively.

### Induction

It is strongly recommended that an induction session is run for students to explain the course approach, attendance requirements, tutorial support, assessment processes, submission deadlines, and so on. The individual learning contract can form part of this process.

### Syllabus Coverage

To achieve EFA Certification it is necessary for associations and organisations to evidence that in aggregate, their qualification frameworks deliver at least 70% of the knowledge and skills outlined within the Fundraising Competencies. CF6, CF7, CF8 are compulsory, while at least one of the topics of CF9 is mandatory. All EFA accredited programmes must include coverage of these units.

### Course Duration

EFA Certified Fundraising Training Programmes should comprise of at least 300 national learning hours. There is no formal upper limit. This figure represents the estimated learning time taken by the average student to achieve the specified learning outcomes of the programme, and thus earn the qualification. It is deliberately not a precise or prescriptive measure – but is meant as an indication of the magnitude of the commitment being taken on by students, in terms of study and assessment load. Even though the figure of 300 hours is not prescriptive, training providers should be able to demonstrate that the amount of study associated with any programme leading to an EFA qualification is sufficient to ensure achievement of the appropriate learning outcomes and standards. As a professional qualification, study time can include relevant work-based activities as well as academic or independent learning.

Notional learning time includes:

- Teaching contact time (e.g. lectures, seminars, tutorials, workshops);
- Preparation for and carrying out assessments (e.g. written coursework, oral presentations, in-class questions and problem solving in groups or individually, examinations);
- Private study sessions (e.g. library research, term-time and vacation reading and information retrieval online or in a direct social context); and
- Work-based activities which lead to assessment, including practice, gaining, applying and refining skills to achieve the threshold level of competence.

## **Group Size**

Because of the specialised professional nature of an EFA Certified Fundraising Training Programme, it is strongly recommended that a maximum group size of one tutor to 20 students is not exceeded.

## **Learning Contracts**

Given the professional commitment of the candidates, it is highly recommended that EFA Certified Fundraising Training Programmes include individual learning contracts with their students regarding study hours both inside and outside their formal teaching sessions so that expectations are as explicit as possible.

## **Managerial Support**

Because of the work-related nature of the assessment for EFA Certified Fundraising Training Programmes, there are resource implications beyond basic classroom or distance learning delivery. Individual students will need to be guided on their choice and interpretation of assignment topics and supported in their research and gathering of evidence for such assignments as appropriate.

## **Links with Employers**

Wherever possible, links with fundraising organisations should be encouraged so that students can apply their learning in a practice context, fully supported by colleagues and managers. A supportive atmosphere at work will help students embed their learning, as well as facilitate access to information and examples to be used in their assignments.

This has the effect of creating a learning community who can share their insights and network effectively outside as well as inside organisations. It may also encourage employers to sponsor or contribute to the fees of students as well as giving them help with study time or equipment. Linking employers to a programme is not only good marketing for the training programme, but also an excellent learning resource in its own right.

## **Tutor Support**

As with any adult learning situation, a facilitative style of teaching where candidates can learn from and with each other is preferable to a didactic approach. As well as group teaching (whether face-to-face or online), each student should receive individual tutorial support.

## **Tutor Profile**

Parts of the EFA Certification syllabus relate to generic management topics and most suitable educational partners will have tutors that are experienced in teaching such material. However, the specialist fundraising elements of the programme will need to be taught by trainers with relevant

fundraising expertise, which includes:

- At least five years fundraising experience; or
- Significant experience of managing fundraising staff as a line manager or consultant; or
- Training experience within a fundraising environment.

All trainers must demonstrate a commitment to continuing professional development as a fundraising tutor or specialist tutor within a programme including:

- Keeping up with relevant practitioner and academic literature on fundraising and/or their specialist subject;
- Keeping updated on advances in best practice in teaching and tutoring; and
- Interacting with other fundraising tutors on EFA Certified courses to share best practice.

Trainers must be able to provide a reference from a senior member of the profession in good standing with his or her national fundraising association or organisation.

## **Administrative Support**

As well as tutorial experts responsible for teaching and assessment, training providers must have administrative support for managing the programme, as follows:

- Registering students on the programme and providing full and accurate details of the assessment strategy and timetable;
- Ensuring that hand-out and hand-in dates are adhered to; and
- Informing EFA via the national fundraising association or organisation of any changes to an accredited fundraising training programme and/or assessment schedule.

## **Development Costs**

Development costs for training can be quite high. National fundraising associations and organisations will need to consider how to raise start-up funding. Thereafter, local fundraising groups and the training provider will determine the price of the programmes. The cost should be based on the local market and general costs. EFA's advice is that fundraising training programmes should be profitable and not directly subsidised at source, as this is the most likely business plan to ensure the programme's longevity and add value to the training for candidates. If funding is available, it is advisable to create bursaries allocated to students on a needs-led basis.

## ASSESSMENT GUIDELINES

EFA Certification aims to introduce and maintain common standards for training across Europe. The training is intended to cater for people who fundraise in a wide range of organisations, areas and situations within the European civil society sector.

Those successfully completing an EFA Certified Advanced Fundraising Training Programme will be capable of leading a fundraising office through strategic fundraising planning and control, by leading a fundraising organisation and developing a philanthropic society. In addition, they will have a strong knowledge and understanding of theoretical principles of fundraising through their application in practice of those fundraising techniques that could bring transformational resources to an organisation as capital campaigns, major donor campaigns and legacy programmes.

### Reading List Guidelines

The point of reading lists is to provide students with the knowledge they need to pass their courses. Therefore, it's not simply a matter of giving them any reference that relates to the topic. To ensure students get the best available knowledge, EFA therefore recommends the following hierarchy for the inclusion of literature in course reading lists:

- a) Textbooks – textbooks are designed as teaching aids, and so provide a good grounding current best theory or practice. Specific chapters can be recommended rather than the entire book. Ensure that the title is a textbook and not practitioner literature (see d.)
- b) Grey literature – grey literature consists of non-peer reviewed publications from academics (e.g. working/white papers), umbrella bodies, government departments, market research companies etc. It often includes the latest thinking that has not yet made it into textbooks or academic journal articles. Particularly useful are literature reviews and papers that provide an overview or review of a subject or field.
- c) Academic journal articles – academic papers are highly specialised, so these should be included in the recommended reading if they provide more specialist information that makes an essential and significant contribution to knowledge, if this can't already be found in a textbook or the grey literature.
- d) Practitioner literature – the quality of practitioner literature is variable, so it should be recommended only if it is really good enough and makes an essential and significant contribution to knowledge, and it is well evidenced.

### Entry Requirements

While there should be no formal academic entry requirements, candidates should have completed secondary education or demonstrate substantial experience and current involvement in fundraising activities.

## Achieving Course Outcomes

At the end of an EFA Certified Fundraising Training Programme candidates will have demonstrated the skills, knowledge and understanding outlined in the EFA Certification Competence Framework. In general terms, assessment strategies should be designed to capture and/or measure (as appropriate) each candidate's ability to:

1. Demonstrate knowledge and understanding of:
  - models, theories, forms and techniques relevant to the development of fundraising in a domestic and international context;
  - the role of fundraising at an organisational and societal level; and
  - the cultural and ethical dimensions of fundraising.
2. Think critically and make judgements:
  - evaluation: e.g. of fundraising and campaigning strategy and practice;
  - analysing and researching information to support strategy; and
  - critical and creative thinking in contexts relevant to fundraising.
3. Demonstrate core skills:
  - information technology: e.g. using IT as a research tool;
  - teamwork;
  - effective communication orally and in writing in a range of media;
  - use of numbers: e.g. in analysing fundraising opportunities from a budgetary perspective; and
  - problem solving.
4. Manage and develop professional skills:
  - developing fundraising that is legal/ethical and appropriate for the focal fundraising environment;
  - planning, organising and allocating resources for fundraising;
  - utilising a range of channels and/or forms of fundraising to raise funds from individuals;
  - cultivating and soliciting appropriate forms of support from corporates and foundations; and
  - building meaningful and rewarding supporter relationships.

## General Principles of Assessment

Assessment for EFA Certified Fundraising Training Programmes should aim to maximise the opportunity for learning and provide opportunities for students to experiment with and reflect on concepts as applied to their working practice.

Students should receive structured feedback from tutors thus demonstrating their knowledge and the understanding gained by attending the fundraising training programme. It should also seek to demonstrate to external stakeholders (such as employers or donors) the highest standards of rigour and objectivity.

### Assessment Must:

1. Determine the standards defined in the EFA Certification Advanced Competence Framework;
2. Assess students' attainment of course outcomes;
3. Be as transparent as possible about assessment criteria and processes and have an appeals process available; and
4. Be appropriately varied – if at all possible, a mixture of assessment methods should be used.

### Assessment Should:

1. Guide and inform students' learning: this mainly refers to feedback, but also implies that students are guided by assessment to what they should prioritise in a course;
2. Be reliable: two candidates with the same levels of skills and knowledge should do equally well in the same assessment (across providers); and
3. Be valued by students as part of the learning process.

## Routes to Assessment

EFA Certified Fundraising Training Programmes should include elements of the following assessment techniques as appropriate to the various course outcomes being assessed.

### Academic Assessment

EFA recognises that assessment strategies will vary reflecting the cultural norms of the focal country. Assessment may be informal (conducted during classes – e.g. through groupwork) or formal (written assignments and/or an examination).

Oral assessment, such as professional conversations and presentations, are also valid and it is likely a combination of different methods will be used within each course. In summary, the assignments can be used either for formative assessment and/or summative assessment as well as potentially opening up opportunities for the use of peer and self-assessment. Providers are encouraged to incorporate the use of technology with regard to assignment preparation, presentation and/or marking and providing feedback to students. To gain EFA accreditation it is necessary to demonstrate that broad coverage of the performance outcomes will be provided.

### Vocational Assessment

Vocational Assessment is the process of judging evidence of competence against specified criteria. To meet the requirements of this type of assessment candidates combine performance evidence and evidence of knowledge and learning and present them in a chronicled Portfolio of Evidence. Specialist assessors who are linked to a formal qualification structure normally undertake this form of assessment.

### Accrediting Prior Experience and Learning

It is one of the fundamental principles of vocational assessment that credit should be given to those who can clearly demonstrate their competence outside of a learning programme by reviewing and presenting existing evidence of achievement.

This process is called Accrediting Prior Experience and Learning (APEL). The following should be considered when designing APEL options for EFA Certification:

- The APEL process should not devalue the taught programme. APEL should not be seen as an easy route to the qualification.
- Programme designers should be clear regarding qualification for this route. If it is for experienced fundraisers there should be a clear definition of what is required.



- APEL candidates should not be embarrassed by their inability to reflect the materials that have been taught. To prevent this, there should be a formal briefing process for those taking part in the APEL process.

The provision of APEL routes to any qualification will be at the discretion of the national fundraising associations and organisations.

## Assessment

The precise content and detailed format of the assessment can vary between countries and providers (subject to validation), but all must satisfy the following points:

- A clear link between the workplace and the assessment;
- Minimum coverage of the syllabus (70%);
- Address all of the course outcomes;
- Include a combination of formative and summative assessment; and
- Provide a clear demonstration of the independence of the assessment process.

## Quality Assurance

As EFA Certification aims to establish commonality for fundraising training across Europe, it is essential that the level of skills and knowledge being tested are of a consistent level between providers. This is likely to involve systems of first and second marking, and the active participation of EFA Certification Committee members to act as an external moderator.

## Process of Certification

Through the Certification process, EFA will seek to verify that Fundraising Training Programmes submitted by EFA members will cover the content required to ensure consistency of standards.

The first step is developing a Fundraising Training Programme or framework that meets EFA's Certification criteria, as set out in the Advanced Competence Framework. EFA members will then be responsible for recognising suitable programmes and recommending those to EFA for approval. EFA's Certification Committee will ratify local recognition, validate eligible programmes and accredit those training programmes. The successful programmes will carry the mark "EFA Certified".

Where there is no national fundraising association or organisation, educational providers are encouraged to contact EFA directly at [info@efa-net.eu](mailto:info@efa-net.eu).

**Contact EFA:**

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