

The revised Advanced Framework

Launch webinar

19 March 2026



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THE FUNDRAISING THINK TANK

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Cast your minds back to 2019



2019



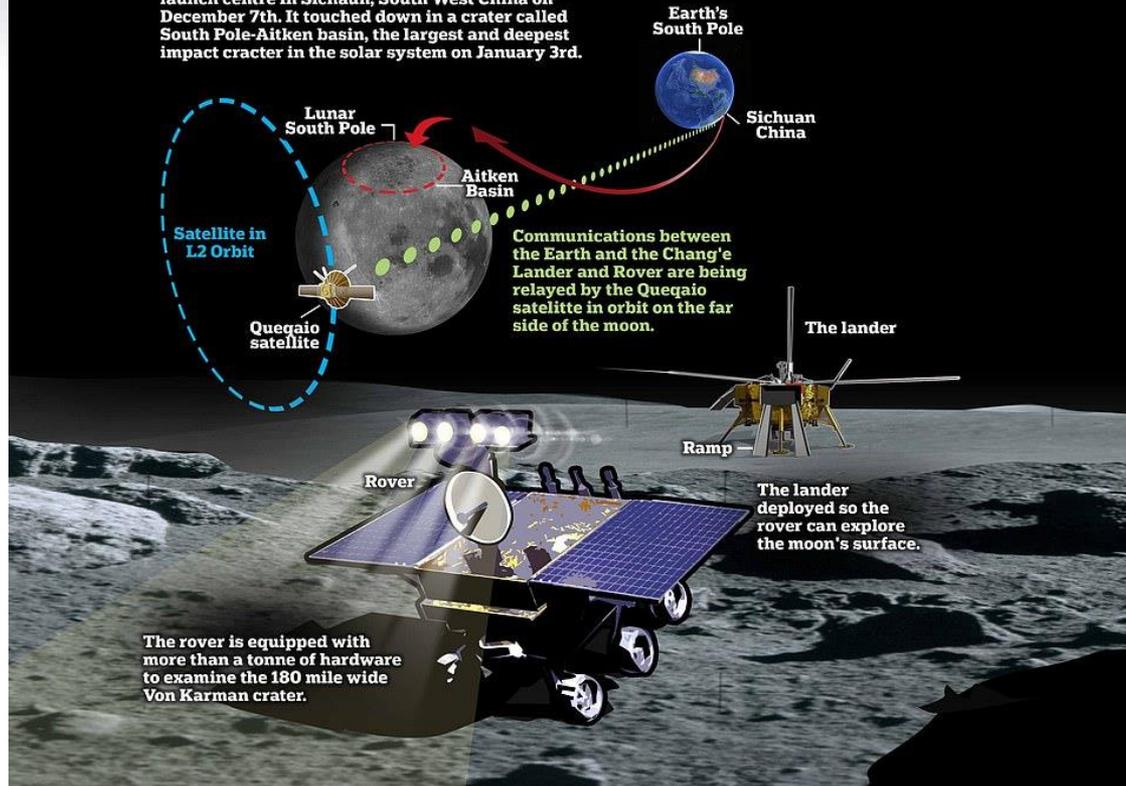
2019



2019

CHINA'S MISSION TO THE MOON

Chang'e-4 took off from the Xichang satellite launch centre in Sichuan, South West China on December 7th. It touched down in a crater called South Pole-Aitken basin, the largest and deepest impact crater in the solar system on January 3rd.



2019



2019



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2019



EFA Certification

Advanced Competence Framework 2022



Advanced Framework

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, or major donor or legacy programmes

Advanced Framework

CF6.0 Strategic fundraising planning and control

CF6.1 Conducting a strategic fundraising audit

CF6.2 Strategic fundraising planning

CF6.3 Resource planning and control

Advanced Framework

CF7.0 Managing a fundraising organisation

CF7.1 Managing fundraising teams

CF7.2 Leading integrated communications

CF7.3 Developing a philanthropic culture

CF7.4 Driving fundraising innovation

Advanced Framework

CF8.0 Developing a philanthropic society

CF8.1 Promoting transparency and the public trust

CF8.2 Broadening participation in giving

CF8.3 Transformational philanthropy

Advanced Framework

Underpinning knowledge

CF6.2 Strategic fundraising planning

- 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.

Advanced Framework

Underpinning knowledge

CF8.1 Promoting transparency and the public trust

- 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.



Advanced Framework

2022 – officially adopted

2023 – we decided to review it

WHY?!

Fundraising since 2019

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THE CHRONICLE OF PHILANTHROPY

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NEWS

Sexual Harassment Is Widespread Problem for Fundraisers, Survey Shows

By [Timothy Sandoval](#) | APRIL 5, 2018

Donors are a big source of the sexual harassment that fundraisers face, according to a survey by the Chronicle of Philanthropy and the Association of Fundraising Professionals.

Two-thirds of people who reported sexual harassment on the job blamed donors, mostly those in senior positions.

About one in four female fundraisers has experienced sexual harassment, compared to one in five male fundraisers have. Almost all the harassers — 96 percent — are men.

Men Only: Inside the charity fundraiser where hostesses are put on show

FT investigation finds groping and sexual harassment at secretive black-tie dinner



Guests at the Presidents Club charity dinner at the Dorchester hotel take a break outside © Tolga Akmen/FT

At 10pm last Thursday night, Jonny Gould took to the stage in the ballroom at London's Dorchester Hotel. "Welcome to the most un-PC event of the year," he roared.

Mr Gould — who presented Channel 5's Major League Baseball show — was there to host a charity auction, the centrepiece of a secretive annual event, the Presidents Club Charity Dinner.

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My experience of being a woman in the charity sector

Guest Blogger | 14 July 2017 | Blogs

Tagged with: [diversity](#) [equality](#) [safeguarding](#)



Women in fundraising leadership panel. Photo: Howard Lake

Discussion about women in leadership in fundraising at the Institute of Fundraising on Tuesday 4 July. I was excited by the session, it was going to be one of my

favorite sessions. The Chair of the panel called out for names that would make the panel more diverse. The Chair of the IoF's Convention Board, Liz Tait, wrote a [personal account of her experience](#) and a [full-time Director of Fundraising](#) — one of the barriers I have battled in my fundraising career. And our new Chair of the Institute of Fundraising, Amanda Giddens, interviewed the previous day in the Guardian about [five big challenges facing all fundraisers](#) and diversity.

Fundraising since 2019

MIT Scandal Exposes a Crisis of Ethics at All Nonprofits

By Heather R. Hill | SEPTEMBER 12, 2019



RICK FRIEDMAN/CORBIS VIA GETTY IMAGES

The handling of donations from Jeffrey Epstein didn't surprise some seasoned fundraisers, who have long thought there was a growing need for change in the nonprofit world.

When news of the MIT Media Lab's coverup of donations from [Jeffrey Epstein](#) was revealed by the [New Yorker](#), we saw reactions of outrage and shock.

There's outrage. There's shock. Then there's my reaction: I'm not all that surprised.

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SPECIAL ISSUE ARTICLE

WILEY

Normative fundraising ethics: A review of the field

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The ethics of fundraising has received scant attention in the academic literature, while there is not a huge amount in the grey and practitioner literature either. There is little that explicitly describes normative theories of fundraising—broad concepts of how fundraising ought to be practised, from which recommendations for applied ethical practice can be drawn. This is the first review of the literature on fundraising ethics, articulating, synthesising and naming (often for the first time) 14 ethical theories/lenses that can be inferred (few are explicitly stated as normative ethical theories) from the literature. In so doing, this review provides scholars and practitioners with a much firmer conceptual foundation for examining and developing professional fundraising ethics, and for analysing applied practice and finding solutions to the ethical dilemmas in applied practice.

KEYWORDS
ethics, fundraising

1 | INTRODUCTION

The ethics of fundraising is a topic that has received scant attention from scholars and academics. When ethics is addressed by fundraising practitioners, it generally focuses on solving applied ethical dilemmas, but it often does this without basing this guidance in scholarship. As is expounded below, writing about the ethics of fundraising tends to focus on the domain of applied ethics—what to do in particular ethical dilemmas—rather than normative ethics—general theories about how to practice fundraising ethically.

This is the first review of the field of normative fundraising ethics that attempts a comprehensive review. As such, it is collating the field from scratch, and thus some parameters have been set on the type of papers and other sources that have been included.

First, this review considers only normative theories of fundraising ethics. While the concepts of applied and normative ethics are explored further below, for the purposes of this review, a normative theory of fundraising ethics is one that can be formulated in general terms that could be applied to specific situations, for example:

Fundraising is ethical when it promotes and protects trust in fundraising and unethical when it harms trust.

More formally, these ethical theories can be stated as: Fundraising is ethical when X and unethical when NOT X—where X is a set of conditions such as 'protects trust in fundraising.'

Few papers state that their purpose is to describe a normative theory of fundraising ethics (or a theory of normative fundraising ethics). Only Kelly (1998) and MacQuillin (2016a)/MacQuillin and Sargeant (2019) state this as their aim. Therefore, this review infers, draws out and synthesises the normative theories—sometimes naming them for the first time. For example, while many writers talk about the importance of trust in and to fundraising ethics, this idea was described and named as a formal theory (the example above) by MacQuillin (2016a).

These normative lenses can be applied to any number of ethical decisions. But the review does not consider in detail examinations of specific ethical dilemmas and how these might be solved—two perennial examples being so-called 'tainted money' and commissioned-based remuneration for fundraisers—even if it could be possible to

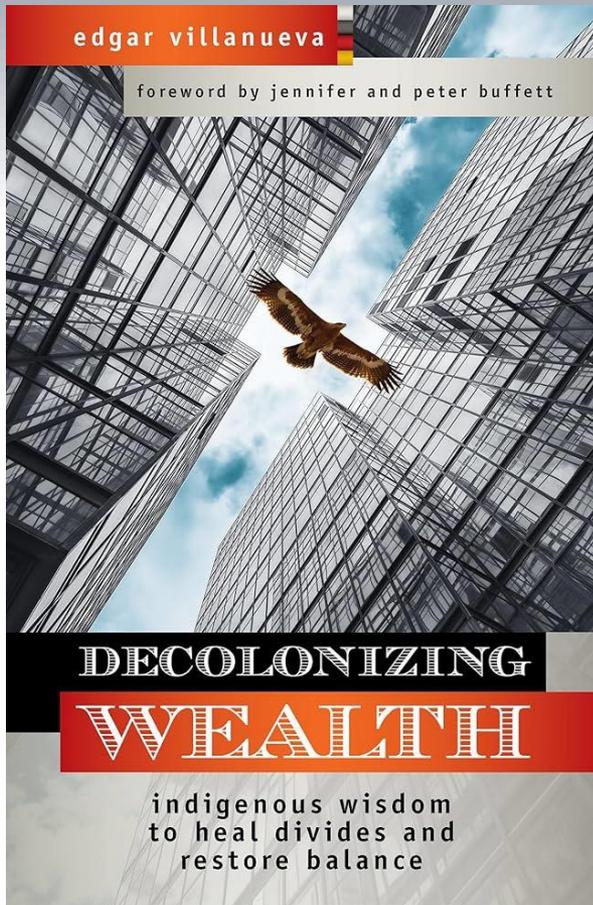
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<https://doi.org/10.1002/nvsm.1740>

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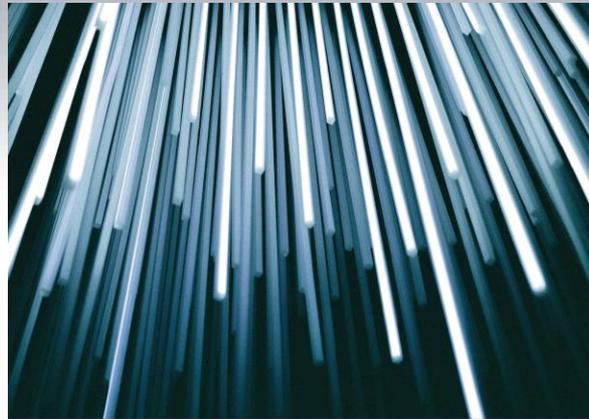


Fundraising since 2019



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Fundraising since 2019



Artificial intelligence and fundraising ethics

A research agenda

What do we know and what don't we know about the ethical use of AI in fundraising?

● FUNDRAISING ETHICS

Cherian Koshy (editor) &
Rogare Critical Fundraising Network
February 2024

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FundraisingAI

About FAI Summit Resources Podcast **The Framework**

Building a Responsible and Beneficial AI Community for Fundraising

We are a fully independent collaborative that exists to understand and promote the development and use of Responsible and Beneficial Artificial Intelligence for Nonprofit Fundraising.

Endorse the Framework

Revising the Framework

The Certification committee is of the opinion that the Advanced Framework needs to be revised and updated to incorporate these and other developments in fundraising.

Because these are all matters, issues a challenges a fundraising leader will need to contend with.

Yes, but...

...all the things I have just spoken about (accept AI) have happened in the English-speaking world.

What relevance are they to the rest of Europe?

European decolonisation

ARGUMENT *An expert's point of view on a current event.*

As Europe Reckons With Racism, Italy Still Won't Confront Its Colonial Past

Italian forces used chemical weapons and committed war crimes in Africa—but the country's sordid history is not taught in schools and is rarely discussed by politicians or intellectuals.

By [Giorgio Ghiglione](#), a freelance writer in Milan.



Hundreds of demonstrators march to support the Black Lives Matter movement during a protest against United States and other parts of the world in Turin, Italy, on June 27. MAURO UETTO/NURPHOTO VIA GETTY IMAGES

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RAPID RESPONSE: DECOLONIZING ITALIAN CITIES

By [discoversociety](#) February 06, 2021 2020, QuickFire

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Annalisa Frisina and Elisabetta Campagni



SOCIOLOGICAL FORUM

Original Article | [Open Access](#) | [CC](#) [i](#)

The Spreading of the Black Lives Matter Movement Campaign: The Italian Case in Cross-National Perspective*

Donatella Della Porta [✉](#) Anna Lavizzari [✉](#) Herbert Reiter [✉](#)

First published: 31 May 2022 | <https://doi.org/10.1111/socf.12818> | Citations: 1

* The research has been conducted within two parallel projects on the Black Lives Matter Movement at Center on Social Movement Studies (Cosmos) at the Scuola Normale Superiore and at Deutsche Zentrum für Integrations- und Migrationsforschung (DeZIM).

† [Correction added on July 28, 2022, after first online publication: In [Table 1](#), Social center/local action group has been moved after BLM Group. "Old" (left) organizations has been updated from 1 to 17.]

SECTIONS

PDF TOOLS SHARE

Revising the Framework

Incorporating these ideas in the framework:

- Is the right thing to do
- Futureproofs the framework
 - Allows those countries where these are live issues to include them in the syllabus and other countries to incorporate them as and when they think it relevant, if they ever do
- Obviates criticism that we have not considered these ideas.

The new framework



Main changes

- Clearer definitions of 'leader' and 'manager', demarcation between these two roles, and guidance about which competencies apply to which role
- Stronger focus on fundraising ethics

Main changes

CF6.0 Strategic fundraising planning and control

CF7.0 Leading [NOT managing] in a fundraising organisation

CF8.0 Fundraising and philanthropy in context, trends, and stakeholder engagement

CF9.0 Incorporated in CF6.0

Main changes

- Guidance on which level to deliver the AF according to the European Qualifications Framework

Manager and leader

- **Fundraising management**
 - enables a nonprofit organisation to achieve its fundraising goals effectively and efficiently through planning and organising
- **Fundraising leadership**
 - creating and improving the environment and context in which fundraising management can thrive

Fundraising leader

In addition to management competencies, leaders need deeper knowledge and skills in areas such as:

- diversity issues
- fundraiser wellbeing
- building an organisational culture of philanthropy
- new and emerging trends
- advanced fundraising ethics

The CF modules – CF6.0

CF6.0 Strategic fundraising planning and control

- Largely the same
- But CF9 has been moved here

The CF modules – CF6.0

CF6.0 Strategic fundraising planning and control

CF6.1 Conducting a strategic fundraising audit

CF6.2 Strategic fundraising planning

CF6.3 Resource planning and control

CF6.4 Managing capital campaigns, major donors or legacy programmes (formerly CF9.0)

The CF modules – CF7.0

CF7.0 Leading in a fundraising organisation

CF7.1 Leading (NOT 'managing') a fundraising team

CF7.2 Ethical and regulatory issues for fundraising leaders NEW

CF7.3 Driving fundraising innovation (ex CF7.4)

CF7.4 Leading integrated communications (ex CF7.2)

CF7.5 Developing a philanthropic culture (ex CF7.3)

The CF modules – CF7.0

CF7.2 Ethics and regulation

- Fundraising regulation & self-regulation
- Corporate responsibility
- Ethics 101
- Ethical dilemmas in fundraising
- Normative fundraising ethics
- Ethical decision making
- Gift acceptance and refusal
- Use of images and stories
- Ethical implications of using AI in fundraising
- Fundraiser remuneration

The CF modules – CF8.0

- CF8.0 Fundraising and philanthropy in context, trends, and stakeholder engagement
- CF8.1 Context for fundraising and the fundraising profession NEW
- CF8.2 Developments in fundraising and philanthropy NEW
- CF8.3 Stakeholder engagement NEW

The CF modules – CF8.0

CF8.1 Context for fundraising and the fundraising profession

- What is fundraising
- Stakeholders to the fundraising and fundraisers
- The fundraising profession
- Fundraising history
- Different approach to/lenses of philanthropy
- Government policy and influence
- Relationship with the state
- Models of social change

The CF modules – CF8.0

CF8.2 Developments in fundraising and philanthropy

- Trends and issues in giving
- New and emerging forms of giving
- New and emerging forms of fundraising
- Lessons from other countries

The CF modules – CF8.0

CF8.3 Stakeholder engagement

- Stakeholder engagement theory
- Donor-centred approaches to fundraising
- Community-oriented approaches to fundraising
- Critiques and defences of philanthropy
- Disintermediation
- Artificial intelligence
- New and emerging forms of stakeholder engagement

A note about AI

- No specific competence section
 - i.e. there's no 'CFX.X – using AI in fundraising'
- Instead, AI is incorporated into relevant parts of framework

A note about DEI

- Matters pertaining to diversity, equity and inclusion are embedded throughout the framework
 - EFA acknowledges Silvia Fontana, head of organisation, labour relations and HR at MSF Italy, for her insight in contributing to these additions

Manager or leader focus

- 70 per cent coverage of the AF for accreditation
- CF6.0 and CF7.0 – manager
 - probably level 5 or 6 on EQF
- CF7.0 and CF8.0 – leader
 - probably at level 6 on EQF
- We recommend teaching at level 6.

What we didn't do – AF-Plus

CF9.0 Elective module (level 6 or 7)

CF9.1 Emerging practices and issues in fundraising

CF9.2 Critical exploration of a fundraising issue
(centre-devised)

CF9.3 Private study (student-driven)

- We yet might introduce AP Plus in the future

Review period

- Still thinking about that, but possibly every three years.

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