



## Fundraising Apprenticeship Programme Overview

### Summary

This apprenticeship programme is designed to give meaningful development by providing practical training, theoretical knowledge and industry awareness that can be implemented quickly to have a positive impact on learners and their organisations.

A fundraiser is a key role within third sector organisations. They are responsible for delivering day-to-day fundraising activities that provide the essential income and engagement with supporters needed to deliver the charitable purpose of the organisation.

Usually working within a fundraising team for a charity or not for profit organisation, fundraisers contribute towards the implementation and execution of the fundraising strategy, projects and plans. They raise awareness and support for their charitable cause and will carry out research on potential new opportunities, analysing and providing data to support proposals for fundraising activities.

In an ever changing and challenging landscape which sees an increase in demand for charitable services against a backdrop of various funding challenges, a fundraiser must be able to creatively problem solve, maintain a positive attitude and contribute to new ideas. Communication skills (including pitching, presenting and negotiating) are also vital as a fundraiser will regularly interact with various internal and external stakeholders.

This work-based programme develops these key skills alongside a solid foundational knowledge of the third sector and an understanding of the challenges the industry faces. It also provides increasingly important digital skills, from data management which supports, validates and/or reviews fundraising activity, to creation and use of multimedia content to enhance presentations and engagement with supporters.

The programme blends interactive face to face workshops with assignments, e-learning, coaching, mentoring and self-guided learning. Learners are given work related projects and assignments throughout to maximise the impact on working practices immediately and are supported by a teaching team of industry experts, academics, keynote speakers and a dedicated programme lead who can provide coaching and support throughout the programme.

Individual learning plans are created to ensure learners are stretched and challenged depending on their levels of experience and on successful completion of this programme, learners will have achieved the Fundraiser Apprenticeship Certificate.

### Who will this programme benefit?

Anyone working within a charity or not for profit organisation who is, or will be, responsible for delivering day to day fundraising activities, liaising with various stakeholders and contributing towards the implementation and execution of the fundraising strategy, campaigns, projects and plans.

It is a great entry role for anyone looking for a career within fundraising and potential progression into more senior fundraising roles.

### **The programme covers:**

- Industry awareness including regulations, funding methods and external / market factors that can impact performance
- Organisational knowledge
- Personal effectiveness
- Engaging new and existing supporters
- Communication, networking and negotiating skills including 'making an ask'
- Creative campaigns & Innovative ideas – concept, planning, execution and evaluation
- Pitch and presentation skills including use of multimedia storytelling to enhance impact
- Building relationships and collaborative partnerships
- Data management and analysis of products / campaigns / services / stakeholders
- Raising awareness of organisation's work
- Working with budgets
- Creative problem solving

### **Delivery Method:**

Your learning experience is made up of a combination of learning methods to give you an immersive and varied experience and sources to draw from, including:

- Monthly practical and interactive workshops (currently delivered remotely)
- Set assignments & independent learning exercises
- Project work
- Peer to peer learning
- Progress reviews and mentoring calls/meetings with programme lead
- Some elements of the programme may also include other methods such as e-learning, webinars, shadowing, job swaps or exchanges and additional mentoring, if and when relevant.

As this is an apprenticeship programme, your learning should equate to 20% of your normal working hours while on programme. We call this Dedicated Development Time. 20% may sound like a lot but the blend of methods used will be designed to weave and align naturally with your job role.

### **Apprenticeship Standard – Fundraiser**

This programme is based on the Fundraiser Apprenticeship Standard (Level 3) so it's important that you familiarise yourself with it and the knowledge, skills and behaviours that it covers. You can find a copy of the standard at the end of this document.

### **Entry/Eligibility Requirements**

The entry requirements for this programme are English & Maths at Level 2\* (GCSE A-C) plus confirmation that you:

- spend at least 50% of your working hours in England over the duration of the apprenticeship programme
- be a citizen of the UK or European Economic Area (EEA), or have lived in the UK or EEA for the past 3 consecutive years
- not already have significant skills and knowledge (through previous qualifications and/or work experience) related to this subject
- be fully supported and endorsed by your line manager
- have a contract of employment that is at least as long as the planned duration of the programme (*please note if you work less than 30 hours a week, your training*

*period duration will need to be extended to allow you sufficient time to progress through the programme)*

*\* Please note that maths & English at Level 2 (GCSE Grade C or above) are a condition of entry of all apprenticeship programmes and we need a copy of your qualification certificates when you register. If you don't have a copy anymore, we can help sign post you in how to request a replacement. If you have not previously achieved these grades you will need to do this as part of your apprenticeship training. We run short intensive boot-camps to help get you there with high pass rates. We make every effort to ensure these are relaxed and enjoyable. You'll be surprised what you can achieve in a few days!*

## **Assessments:**

### **Initial Assessments:**

- English & maths\* initial assessments will be carried out at the start of the programme. These are vital to determine the level that each learner is working at and to flag any additional support needed to complete the programme.
- In addition, a 'Skills Check' will be delivered to help to set a baseline of your current skills level in the areas covered in this programme.
- Both of these will be used alongside the information provided in the Individual Learning Plan (ILP) to set individual key milestone goals to be reached at various points throughout the programme.

### **On programme assessment:**

- Regular on programme assessment including reports, presentations, project work, research assignments etc.
- Development of a portfolio of evidence.
- Completion of monthly Dedicated Development Time (DDT) reflective logs
- Quarterly performance reviews between learner, line manager and Bauer Academy.
- Completion of a 'Case for Support' plan to cover subject, title and scope (this must be approved by End Point Assessment Organisation to allow you to proceed to End Point Assessment).

### **End Point Assessment:**

The End Point Assessment (EPA) is carried out by an external assessment organisation. It typically lasts around 2 months and takes place following successful completion of the 12 month programme.

For Fundraiser, the End Point Assessment consists of:

- Case for support pitch, presentation with questions & answers
- Professional discussion underpinned by a portfolio of evidence

## **Your Learning Commitment**

We've put together a fantastic, engaging and rewarding programme for you. However, it does take commitment from you to achieve and we expect all learners to take responsibility for their own learning. This includes being disciplined in your studies, flagging or identifying any issues early on so we can help support you where possible, tracking your learning hours, submitting assignments on time, attending all workshops and regularly reflecting on your learning. We are here to support you and facilitate the journey but you will ultimately get out of the programme what you put into it.

## **Duration:**

12 months on programme followed by the End Point Assessment period.

**Professional Fundraiser – Timetable (workshop dates TBC)**

<b>Module</b>	<b>Workshops</b>	<b>Date</b>
1. Communication 1: Personal Effectiveness & EQ	Intro, time management & communication basics	TBC
	Emotional intelligence & understanding donor / people motivation	TBC
2. Industry Awareness	Industry Awareness	TBC
3. Organisational Knowledge	Organisational Knowledge	TBC
	<i>**additional short finance/P&amp;L session included **</i>	
4. Creative Campaigns 1: Creativity & Idea Generation	Creativity & Idea Generation	TBC
5. Creative Campaigns 2: Pitch & present	Pitching / presentation basics	TBC
	Pitching / presentation advanced (incl. confidence)	TBC
6. Creative Campaigns 3: Project Management & Evaluation	Project Management & Evaluation	TBC
7. Problem Solving, Building Relationships & Negotiating	Problem Solving, Building Relationships & Negotiating	TBC
8. Engaging New & Existing Supporters	Engaging New & Existing Supporters	TBC
9. Communication 3: Raising Awareness of Organisation's Work (& EPA prep)	Raising Awareness of Organisation's Work	TBC
10. Case for Support Project (EPA prep)	EPA prep / revision workshop	TBC
11. EPA period commences		TBC

# FUNDRAISER

## Overview of the role

### Raise funds for charitable causes

#### Details of standard

##### Occupation summary

This occupation is found in the third sector in charities and not-for-profit organisations of all sizes. The role is usually based within a fundraising team internal to a charitable or not-for-profit organisation but on occasions can be with a specific agency that provides fundraising consultation and services.

The broad purpose of the occupation is to raise funds for charitable causes. Funds are raised from a range of sources including but not limited to trusts and foundations, digital media, major donors, corporate partners, raffles and lotteries, payroll giving, events, community engagement, individual giving, gift aid and legacies. A fundraiser will typically work within or have a focus on one or more of these areas. In addition, a fundraiser is also responsible for raising awareness and non-financial support for their charitable cause. As part of a fundraising team a fundraiser will contribute to the implementation and execution of the fundraising strategy, projects and plans. They will be responsible for delivering day-to-day fundraising activities that provide the essential income and engagement with supporters for the delivery of the charitable purpose of the organisation. They will also carry out research for opportunities and analyse and provide data to support any proposals for developing fundraising activities. The role is a common entry point for many looking for a career within fundraising and, potential progression into more senior fundraising roles.

In their daily work, an employee in this occupation interacts with a range of internal teams such as (but are not limited to) marketing, media, finance, service delivery, volunteering, advocacy, I.T and procurement. Externally, a fundraiser would interact, either autonomously or as part of a team, with clients, donors, supporters and prospective supporters of their charitable cause (e.g. corporate partners, high net worth individuals and the general public), as well as other stakeholders including suppliers, other charities, the media and professional bodies. The role is likely to be home or office-based, although they may spend time away from their base attending and supporting events, meetings with internal or external stakeholders, carrying out specific fundraising activities or carrying out research.

An employee in this occupation will be responsible for reporting to a fundraising manager they will undertake the required tasks for the fundraiser. These tasks may require planning and prioritising personal and team activities to meet organisation needs. Due to the nature and level of responsibility it is not anticipated that the role would have any budgetary responsibilities.

They will be responsible for:

- Building and maintaining relationships to acquire new supporters and retain existing ones

- Securing funds and raising awareness of their charitable cause in line with agreed targets and KPIs
- Managing a portfolio of external stakeholders including supporters, volunteers, corporate partners and eventers
- Contributing towards the management of suppliers
- Maintaining a database of supporters
- Conducting research in order to gain valuable insight
- Developing and delivering fundraising plans as directed
- Putting together creative content to build a case for support
- Contributing towards the development of fundraising plans and evaluating their effectiveness
- Promoting fundraising propositions and using innovation to develop new ones
- Compliance with Fundraising and Data Protection regulations
- Addressing and solving problems within their role
- Sales activities identified in fundraising plans

### **Typical job titles include:**

#### **Fundraising/Development/Income Generation**

**Officer Fundraising/Development/Income Generation Executive Major**

**donor/Major gift/Philanthropy Fundraiser Corporate Partnerships**

**Fundraiser Individual giving Fundraiser Events/Community Fundraiser Legacy**

**fundraiser Relationship Manager**

## **Occupation duties**

### **DUTY**

**Duty 1** Identify, build and maintain relationships to raise financial (such as funds) and non-financial support (such as raising awareness) of the charitable cause

**Duty 2** Develop proposals and recommendations for inclusion in the development and execution of fundraising plans, such as plans to identify and acquire new supporters or plans to maintain and develop a portfolio of existing supporters

**Duty 3** Recommend and autonomously carry out fundraising activities to achieve financial and non-financial targets and KPIs whilst keeping within agreed expenditure budgets where applicable

**Duty 4** Undertake external market research and analysis of fundraising activity to continuously improve performance and support innovation across the team, making recommendations where necessary

**Duty 5** Use a variety of different mediums to create material for an effective 'Case for Support' to acquire new supporters and/or retain existing ones

## DUTY

**Duty 6** Monitor, evaluate and report on fundraising activities using a range of metrics to identify and make recommendations for areas of development and opportunity

**Duty 7** Support the ongoing care and stewardship of supporters through recommending and implementing activities and initiatives that meet both the needs of the supporter and the organisation

**Duty 8** Produce high quality written and verbal communication material to engage internal and external stakeholders to maximise any opportunities, situations and issues that will impact on the charitable work, such as (but not limited to) approaches to and from prospective donors and partners, applications for funding from trusts or statutory bodies, planning for fundraising events and the development of fundraising campaigns

**Duty 9** Undertake, both autonomously and with others, data analysis and research of existing and prospective supporters in order to understand behaviour and motivation, to enable them to appropriately support the charitable aims of the organisation

**Duty 10** Carry out the accurate update and maintenance of IT and records systems to ensure data is compliant and appropriately used to inform fundraising activities

**Duty 11** Provide a high quality first point of contact with donors to identify and address complaints or problems and seek early resolution or escalation where required

## KSBs

### Knowledge

**K1:** Commercial understanding of the third sector and fundraising environment, such as external and market factors that impact fundraising performance and the role of competitors and collaborators

**K2:** The different types of fundraising methods and how they are used, such as Community, Events, Philanthropy, Major Gifts, Individual Giving, Legacy, Monthly Giving, Foundations, Corporate Fundraising, Gift Aid

**K3:** Regulation, legislation and codes of practice relating to the fundraising environment, such as fundraising regulations, data protection compliance and ethical codes of practice,

**K4:** Methodologies to undertake internal and external analysis and evaluation of fundraising products and services, such as cost benefit analysis, statistical evaluation, principles of surveys, stakeholder analysis, STEEPLE, SWOT and ERIC frameworks

**K5:** The elementary Financial principles, such as income streams, cash flow, taxation, budgeting, forecasting, cost control and applying best procurement practice

**K6:** : The key components of a 'Case for Support', such as organisational aims, creative content to showcase the cause to supporters, impact of the work of the organisation, strategic aims, stakeholders and how these meet the needs of a supporter

**K7:** The key components of a supporter journey, such as reward and recognition, maximising supporter commitment, appropriate communication, understanding donor

motivation and tailoring supporter journey accordingly

**K8:** The key components of a Fundraising Plan, such as recording fundraising activities over a period of time, including campaign dates, area marketing and acquisition strategies, impact analysis, evaluation and budgeting

**K9:** Organisational understanding, such as purpose, mission statement, organisational strategy, values, company policies, brand guidelines, volunteering policies, complaints policy, health & safety policy, cash handling, lone working policy

**K10:** Different methods of communication to internal and external stakeholders, such as verbal, non-verbal, building rapport, designing fundraising and marketing materials, digital, mailings and newsletters

**K11:** Importance of accurately recording supporter information on a supporter relationship management system, to help inform fundraising activities and ensure data is compliant

**K12:** The internal and external dependencies that influence the success of fundraising, such as legal, health & safety, finance, operations, volunteers and suppliers

**K13:** How to approach and engage new and existing supporters to ask for both financial and non-financial support

**K14:** The different forms of donor motivation and how they influence the method of fundraising employed, the impact that has on the donor and their continued engagement with the cause

**K15:** How to approach, analyse and address problems

**K16:** Regulation, legislation, codes of practice and policies relating to inclusion, safeguarding and whistle-blowing

## Skills

**S1:** Uses the most appropriate communication method for the message through the use of good questions and listening techniques

**S2:** Identify and apply pragmatic solutions using a range of methods to maximise value to the organisation

**S3:** Use data management (compliant with data protection regulation) and analysis to produce and present evidence to support, validate and/or review fundraising activity to different stakeholders, such as analysing the effectiveness of a fundraising event

**S4:** Evaluate and make unsupervised decisions quickly based on the current situation or environment

**S5:** Control, monitor and analyse expenditure and/or financial fundraising transactions to maximise spend on the organisation's charitable cause, including Gift Aid

**S6:** Use a variety of information sources (compliant with data protection regulation) to identify individuals, groups or organisations who can potentially provide effective support for the organisation

**S7:** Plan and prioritise time to ensure fundraising activities are managed well and fundraising potential is maximised

**S8:** Build relationships and identify, engage, sustain and satisfy the on-going needs of supporters and stakeholders by building rapport and trust, and resolve conflicts constructively

**S9:** Identify and apply appropriate technological solutions to improve the effectiveness of processes, procedures and development of fundraising activity

**S10:** Demonstrates self-awareness and recognises their own emotions and their impact on self and others.

**S11:** Adapt and tailor presentation style and technique to meet the needs of the audience

**S12:** Build a diverse network both internally and externally

**S13:** Articulate and communicate the mission, goals and activities of your organisation to influence others to engage with your cause, applying appropriate fundraising techniques such as networking, handling objections, negotiating and making an ask

**S14:** Adapt working style depending on the situation or needs of the other person

**S15:** Identify, evaluate and apply solutions to problems as they arise

## **Behaviours**

**B1:** Resilient and maintains a positive attitude

**B2:** Acts to put the organisation's cause, and the needs of stakeholders at the centre of their fundraising activity

**B3:** Sources effective solutions, and seeks to continuously improve and develop

**B4:** Reliable and acts with integrity, empathy, honesty and trustworthiness

**B5:** Works collaboratively to deliver fundraising activities

## **Qualifications**

### **English & Maths**

Apprentices without level 2 English and maths will need to achieve this level prior to taking the End-Point Assessment. For those with an education, health and care plan or a legacy statement, the apprenticeship's English and maths minimum requirement is Entry Level 3.

A British Sign Language (BSL) qualification is an alternative to the English qualification for those whose primary language is BSL.

## **Additional details**

### **Occupational Level:**

3

### **Duration (months):**

18

### **Review**

This apprenticeship standard will be reviewed after three years