Host Toolkit: Planning Your Way to a Successful AFP Fundamentals of Fundraising Course

Last Update: September 2014

AFP-IHQ congratulates and especially thanks the AFP Greater Philadelphia Chapter. Philadelphia volunteers developed and drafted The AFP Essentials of Fundraising Program. Thanks to their creative efforts, AFP was able to synthesize the best of both Essentials of Fundraising and the AFP First Course in Fundraising to create the new AFP Fundamentals of Fundraising Course for all of AFP’s communities.

AFP also thanks the following North American AFP Essentials/AFP First Course Task Force Members:

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# TABLE OF CONTENTS

**SECTION I – PROGRAM OVERVIEW**

1.1 Highlights of the AFP Fundamentals of Fundraising Course ................................................................. 4  
  1.1.1 Program Objectives: .......................................................................................................................... 4  
  1.1.2 Course Content: .............................................................................................................................. 5  
  1.1.3 Audience: ......................................................................................................................................... 5  
  1.1.4 Length: ............................................................................................................................................ 6  
1.2 Basic Information .................................................................................................................................... 7  
1.3 Instructor-Level Information .................................................................................................................. 8

**SECTION II – ADMINISTRATIVE INFORMATION**

2.1 Administrative Guidelines ...................................................................................................................... 9  
   2.1.1 Course Pricing Guidelines: ............................................................................................................. 9  
   2.1.3 Course Products: ............................................................................................................................ 10  
   2.1.4 Pricing & Ordering Information: .................................................................................................... 10  
   2.1.5 Where: .......................................................................................................................................... 11  
   2.1.6 Responsibilities: ............................................................................................................................. 12  
2.2 Planning Time Line and Checklist AFP Fundamentals of Fundraising Course ..................................... 13  
2.3 Sample Budget .................................................................................................................................... 15  
2.4 Sample Agenda ....................................................................................................................................... 16  
2.5 Planning Tips ......................................................................................................................................... 17  
2.6 Recruiting Faculty for the AFP Fundamentals of Fundraising Course ................................................. 18  
2.7 Marketing the AFP Fundamentals of Fundraising Course ..................................................................... 19  
2.8 Onsite Checklist for AFP Fundamentals of Fundraising Course Host(s) ............................................ 22  
2.9 Sample Brochure ................................................................................................................................... 23  
2.10 AFP Fundamentals of Fundraising Course Speaker Recommendation Form ...................................... 25  
2.11 AFP Fundamentals of Fundraising Course Sign-in Sheet Sample .................................................... 26  
2.12 AFP Fundamentals of Fundraising Course Agreement ........................................................................ 26-30
1.1 Highlights of the AFP Fundamentals of Fundraising Course

1.1.1 Program Objectives:

The AFP Fundamentals of Fundraising Course objectives help fundraisers to:

• Explain the culture of philanthropy and the role philanthropy plays in organizations.
• Name 8-10 key reasons people give.
• Describe the primary sources of contributions.
• Describe the essential components of an integrated development program and the primary purpose of each one.
• State key qualities that every fundraiser should possess and describe a basic path for personal professional development.
• Define and clearly articulate an organization’s case for support.
• Indicate the advantages of individual and group solicitation methods, and summarize how each is best incorporated into an integrated development program.
• Distinguish the differences between and uses for annual giving, major gifts, and planned giving.
• Develop appropriate policies and procedures to ensure integrity of donor intent and to honor donors and volunteers in ways appropriate to their contributions to the organization.
• Implement a development plan that supports the organization’s overall mission and strategic plan, and meets the needs of stakeholders.
• Identify and segment the pool of potential donors, using appropriate variables such as previous gift level and potential, interest areas and relationship to organization, and organizational needs.
• Initiate, maintain, and enhance continuing and mutually beneficial relationships with volunteers, donors, and qualified prospects.
• Ensure that relationships are supported and enhanced through effective donor records management and proper stewardship of funds.
• Develop a comprehensive marketing and communications plan, including appropriate events and activities to inform and engage donors and qualified prospects.
• Describe the roles of the Internet and social media in fundraising.
• Develop, implement, and evaluate solicitation strategies that will maximize the outcomes of solicitation efforts.
• Implement appropriate acknowledgement, acceptance, and recognition practices to honor donors and volunteers.
• Apply effective techniques for recruiting, training, managing, evaluating, and recognizing volunteers.
• Discuss ways to best utilize volunteers in the fundraising process.
• Describe the essential roles and responsibilities of board and staff members.
• Coordinate the budgeting and planning process of the fundraising department with that of the overall organization.
• Ensure accountability in fundraising activities through effective planning, reporting, and evaluation processes.

1.1.2 Course Content:
The AFP Fundamentals of Fundraising Course was developed with a foundation from the AFP Essentials of Fundraising Program and the AFP First Course in Fundraising course. The new course is composed of 7 modules that have been designed by experienced fundraising professionals to meet the real-world needs and challenges nonprofit organizations face every day. This 16 hour program includes case studies and projects for groups and individuals to make the learning experience both substantive and enjoyable. The AFP Fundamentals of Fundraising Course offers a complete overview of the development function, featuring the most current information and techniques. This 16 hour intensive program will provide an overview of skills, techniques, and program components for individuals with 0 to 4 years of fundraising experience.

The modules include:
Module I: Overview of Fundraising
Module II: Developing an Integrated Fundraising Program
Module III: Marketing for Ongoing Success
Module IV: Building and Sustaining Relationships
Module V: Securing the Gift
Module VI: Volunteers – Partners in Fundraising
Module VII: Management & Accountability

The AFP Fundamentals of Fundraising Course is presented through lecture, case studies, and the encouragement of participant dialogue. Printed participant manuals and faculty materials on a CD are ordered by the course host(s) for distribution to faculty members and participants.

1.1.3 Audience:
The AFP Fundamental of Fundraising Course is designed for fundraising professionals with 0 to 4 years of experience. This may also include others who have responsibility for the development function such as:
• executive directors;
• vice presidents of development;
• program managers;
• special event coordinators; and
• leadership volunteers for local nonprofits and foundations.

Individuals who are transitioning into the sector and those new to the development field will learn how to organize and manage fundraising programs, gain basic skills in a variety of techniques, and prepare for a career in development. Trustees and CEOs will discover useful tools to change the direction and clarify the expectation of the development office. Volunteers will find this course a valuable preparation for gift solicitation. Course attendance averages between 20 to 30 participants and CFRE continuing education points can be earned.
1.1.4 Length:
The *AFP Fundamentals of Fundraising Course* is a 16 hour CFRE approved course. The course can be offered in a variety of time lengths, over multiple days or weeks. The course host(s) may choose to offer the modules that are best for them and their participants. The recommended layouts of length are:

Day 1  8:00 a.m. – 5:30 p.m.  
Day 2  8:00 a.m. – 5:30 p.m.  
OR  1 module per day/session  i.e. 10:00 a.m. – 12:30 p.m.  
or 5:00pm – 7:30 p.m.

*Please reference sample Agenda in on page 15.*
1.2 Basic Information

**AFP Fundamentals of Fundraising Course**

The new *AFP Fundamentals of Fundraising Course* is now available for all AFP Chapters to offer to their members. This new course was developed with a foundation from the Essentials of Fundraising Program and the First Course and is composed of seven modules that have been designed by experienced fundraising professionals to meet the real-world needs and challenges nonprofit organizations face every day. This 16 hour program includes case studies and projects for groups and individuals, making the learning experience both substantive and enjoyable. The *AFP Fundamentals of Fundraising Course* offers a complete overview of the development function, featuring the most current information and techniques.

This intensive program will provide an overview of skills, techniques and program components for individuals with 0 to 4 years of fundraising experience. Full participation in the *AFP Fundamentals of Fundraising Course* is applicable for 16.0 points of CFRE Credit in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.

**The modules are:**

- **Module 1:** Overview of Fundraising
- **Module 2:** Developing an Integrated Fundraising Program
- **Module 3:** Marketing for Ongoing Success
- **Module 4:** Building & Sustaining Relationships
- **Module 5:** Securing the Gift
- **Module 6:** Volunteers – Partners in Fundraising
- **Module 7:** Management & Accountability

### Special thanks to the investing AFP Chapters

**AFP-IHO** congratulates and especially thanks the AFP Greater Philadelphia Chapter. Philadelphia volunteers developed and drafted *The AFP Essentials of Fundraising Program*. Thanks to their creative efforts, AFP was able to synthesize the best of both *Essentials of Fundraising* and the *AFP First Course in Fundraising* to create the new *AFP Fundamentals of Fundraising Course* for all of AFP’s communities.

**There is no validity period for the AFP Fundamentals of Fundraising Course.**
1.3 Instructor-Level Information

Preferred Instructor Qualifications:

- Hold either a CFRE, ACFRE, Masters Degree or PhD credential. Individuals who are retired but who held the CFRE credential at the time of their retirement are also eligible to teach
- AFP Faculty Training Academy graduate
- Experienced and generalist fundraiser – Have a broad range of fundraising experience with proven teaching abilities
- Most important is that each faculty member must be knowledgeable about the subject of the module he/she is to teach, and must be able to communicate effectively in front of a group
2.1 Administrative Guidelines

The following information highlights and clarifies significant administrative policies, procedures, and implementation guidelines as they pertain to the AFP Fundamentals of Fundraising Course. They are designed to assist course host(s) with the delivery of the Fundamentals course and will remain in effect until the program is revised or a future administrative policy or procedure that supersedes them is released.

The goals of the implementation process are to:

- Orient instructors and instructor trainers to the AFP Fundamentals of Fundraising Course products;
- Prepare instructors and instructor trainers to conduct the AFP Fundamentals of Fundraising Course;
- Standardize instructional content and methodology so that all instructors are conducting the courses in a consistently uniform manner;
- Help the course host(s) understand and implement their duties.

2.1.1 Course Pricing Guidelines:

<table>
<thead>
<tr>
<th><strong>AFP Fundamentals of Fundraising Course</strong></th>
<th><strong>Option A: Joint Venture</strong></th>
<th><strong>Option B: AFP Member Franchise Fee</strong></th>
<th><strong>Option C: Non-AFP Member Third Party Franchise Fee</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Full Course (all 7 Modules)</td>
<td>$390 AFP Member; $490 Non-member</td>
<td>$2,900.00 + $50.00 per participant manual</td>
<td>$5,000.00 + $50.00 per participant manual</td>
</tr>
<tr>
<td>Per Module</td>
<td>$89 AFP Member; $119 Non-member</td>
<td>N/A</td>
<td>N/A</td>
</tr>
</tbody>
</table>

- Please note that the AFP Member Franchise Fee and the Non-AFP Member Third Party Franchise Fee cover a **one time use of each module**, taught in a two-day time period or over an extended period of time.
2.1.3 Course Products:

<table>
<thead>
<tr>
<th>Products</th>
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</thead>
<tbody>
<tr>
<td><strong>AFP Fundamentals of Fundraising Course</strong></td>
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<tr>
<td>Participant Manual</td>
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<tr>
<td><strong>AFP Fundamentals of Fundraising Course</strong></td>
</tr>
<tr>
<td>Module I: Overview of Fundraising</td>
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<tr>
<td><strong>AFP Fundamentals of Fundraising Course</strong></td>
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<tr>
<td>Module II: Developing an Integrated Fundraising Program</td>
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<td><strong>AFP Fundamentals of Fundraising Course</strong></td>
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<td>Module III: Marketing for Ongoing Success</td>
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<td><strong>AFP Fundamentals of Fundraising Course</strong></td>
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<td>Module IV: Building and Sustaining Relationships</td>
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<td><strong>AFP Fundamentals of Fundraising Course</strong></td>
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<tr>
<td>Module V: Securing the Gift</td>
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<tr>
<td><strong>AFP Fundamentals of Fundraising Course</strong></td>
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<tr>
<td>Module VI: Volunteers – Partners in Fundraising</td>
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<td><strong>AFP Fundamentals of Fundraising Course</strong></td>
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<tr>
<td>Module VII: Management &amp; Accountability</td>
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<tr>
<td><strong>AFP Fundamentals of Fundraising Course</strong></td>
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<tr>
<td>Faculty CD</td>
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<tr>
<td><strong>AFP Fundamentals of Fundraising Course</strong></td>
</tr>
<tr>
<td>Faculty Manual</td>
</tr>
<tr>
<td>Host Toolkit</td>
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<tr>
<td>Marketing Toolkit</td>
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<tr>
<td>Participant completion certificate</td>
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<tr>
<td>Name badge stock</td>
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<tr>
<td>Course roster sign-in sheets</td>
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</table>

2.1.4 Pricing & Ordering Information:

The base registration fee for participants is $390 for AFP members and $490 for non-members. From this, the AFP International Headquarters receives $195 per member and $245 per non-member. The course host(s) may choose to charge a fee higher or lower than the base fee to subsidize the registration fee for some participants (charging less than $390) or to cover extra meals or other costs. In this case, AFP IHQ still receives $195/member and $245/non-member.

Additionally, there will be a $1,000.00 deposit in U.S. dollars made to AFP IHQ by a host chapter upon signing the course Agreement. This $1,000.00 will be applied to the total cost of your course and is required up front for AFP to ensure you receive all participant/faculty materials/products on time. **The deposit must be received at AFP IHQ no later than 60 days prior to the planned start date.** The course host(s) collects and tracks all registration fees. All invoices from AFP International are in U.S. Dollars. All payments to AFP International Headquarters must be in US Dollars. Canadian sites have the option of collecting registration fees in Canadian dollars and being invoiced by IHQ for fees in U.S. dollars prior to the event. Again, payment must be in U.S. dollars.
TO PLACE YOUR ORDER:

• Email your final faculty list to the AFP IHQ Professional Development Coordinator no later than 8 weeks prior to the course start date for faculty materials to be shipped.
• Email your nearly final participant list to the AFP Professional Development Coordinator 3 weeks prior to the course date for participant materials/manuals to be shipped.
• On the Agreement Form, PLEASE make sure you provide a street address and not a PO Box for the shipment of CD’s, manuals, certificates, etc. Shipments to you will come to your designated site either UPS or FedEx; and neither can deliver to a PO Box.

Course host(s) will not be charged for shipping & handling. However, if the AFP PAD Coordinator receives your faculty or participant lists past the recommended date above, an expedited shipping charge will be added to your final invoice.

Manual orders come from Omnipress in Madison, WI. These orders are shipped via UPS Ground, unless otherwise requested (and paid for).

NOTE: Materials being shipped to Mexico or Canada will incur separate shipping fees.

2.1.5 Where:
The course host(s) is responsible for securing a location to hold the course. Some course hosts’ choose to use hotel meeting rooms; others have a training room or conference room space that can be utilized without cost.

The course host(s) must select and submit the location for the AFP Fundamentals of Fundraising Course before the date will be listed on the AFP education schedule. When selecting the location, a course host should consider the following:

• The site should be accessible by any participants with a disability (i.e., ramps for wheelchairs; accessible restrooms, etc.)
• The site should be in a central location, with easy access to area highways, etc., and in close proximity to area hotels for out-of-town participants.
• Room set-up for the course should be set in rounds. A registration table should be set up outside the door to the room, or just inside the room, for easy participant registration.
• Audio visual requirements for the course include a computer, LCD projector, screen, flip chart, markers, podium (if desired), and possibly a microphone, depending on the size of the room. There should be a table at the front of the room for faculty materials.
2.1.6 Responsibilities:

Course Host(s) Responsibilities:
Ø Select a date approximately six (6) months in advance.
Ø Complete the agreement contract and submit to AFP IHQ along with the deposit as soon as a date and venue have been chosen; **but the deposit must be received at AFP IHQ no later than 60 days prior to the planned start date.**
Ø Select one person to coordinate details with AFP IHQ.
Ø Select a location to hold the course.
Ø Recruit faculty and provide list to AFP IHQ. Order faculty CDs from AFP IHQ (to be sent by Omnipress) to be sent to the course host(s) 4-6 weeks prior to course. The course coordinator is then responsible for dispersing the CDs to the individual faculty.
Ø Collect registration fees.
Ø Arrange for snack breaks and meals, if applicable.
Ø Order participant manuals from AFP IHQ (to be sent by Omnipress) 4 weeks prior to course.
Ø Provide participant list to AFP IHQ 2 weeks before your course so your final packet can be sent. Final packet includes: Completion certificate for each attendees, sign-in sheets for each day, badge stock, ethics code, and a return inventory checklist.
Ø Provide an on-site monitor (usually the course host(s)) to ensure that participants sign in, welcome and introduce faculty members, and sign and distribute certificates of completion to participants at the end of the course.
Ø Provide AFP IHQ with a financial summary (including number of AFP members and non-members in attendance), a final participant roster, and a copy of the course agenda with faculty names, upon completion of the program.
Ø Return unused participant manuals and all faculty CDs to AFP IHQ at the close of the course.

AFP International Headquarters Responsibilities:
Ø Post the course information on the AFP website.
Ø Contact the course host(s) for the faculty list (immediately after receiving agreement; follow-up if needed) and participant list (2 weeks prior to the course) in order to send faculty CDs and participant manuals.
Ø Provide the course coordinator with the final packet, once we receive the nearly final participant list (4 weeks prior to the course).
Ø Invoice course host(s) at the close of the course. Balance of payment due once course is completed and the financial summary and other materials are received from the course host(s).
Ø Send any additional/late registrant certificates to course host(s) for them to sign and send to participant.
## 2.2 Planning Time Line and Checklist AFP Fundamentals of Fundraising Course

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th># of Weeks Prior</th>
<th>PMR</th>
<th>Date Due</th>
<th>Date Done</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Choose preferred course dates and check calendar for conflicts</td>
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<td>2.</td>
<td>Appoint individual to be primary contact with the AFP IHQ and on-site coordinator</td>
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<td>3.</td>
<td>Submit deposit in U.S. dollars and signed agreement to AFP IHQ. <strong>Must be received at AFP IHQ no later than 60 days prior to planned start date.</strong></td>
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<td>4.</td>
<td>Select location, execute commitment</td>
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<td>5.</td>
<td>Develop a budget</td>
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<td>6.</td>
<td>Plan promotion campaign/target audience</td>
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<td>7.</td>
<td>Place newsletter article: advise surrounding chapters to do the same; date will be listed in on the website.</td>
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<td>8.</td>
<td>Prepare brochures for promoting course</td>
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<td>9.</td>
<td>Obtain mailing lists from course host(s)</td>
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<td>10.</td>
<td>Recruit faculty (should be done 4-6 weeks prior to course to allow time to prepare), collect faculty bios for introductions, and order faculty CDs from AFP IHQ. <strong>Ask each faculty member to sign and return to AFP IHQ the AFP Fundamentals of Fundraising Course faculty agreement form located on page 31 of this Host Toolkit or on the Faculty CD.</strong></td>
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<td>11.</td>
<td>Plan catering, A/V support and confirm arrangements</td>
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<td>12.</td>
<td>Mail/email brochure</td>
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<td>13.</td>
<td>Send follow-up postcard or letter to the initial list of prospects</td>
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<td>14.</td>
<td>Confirm catering</td>
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<td>15.</td>
<td>Order participant manuals from AFP IHQ (should be done 4 weeks prior to course)</td>
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<td>16.</td>
<td>Develop agenda, faculty roster and participant roster and make copies for participants</td>
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<td>17.</td>
<td>Prepare name badges or name tents for participants</td>
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<td>18.</td>
<td>Assemble materials needed onsite (receipt book, pens, sign-in sheet, CD with PowerPoint slides, agendas, rosters, certificates of completion, name badges, or name tents)</td>
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<td>19.</td>
<td>Provide financial summary and return <strong>ALL</strong> faculty CDs, extra manuals, and other materials to IHQ after course</td>
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**NOTE:** Faculty CDs and Participant Manuals should be ordered through Professional Advancement at AFP International Headquarters. Please contact afpinternationalconference@afpnet.org or (703) 519-8465 for
more information. The manuals/CDs may arrive from Omnipress, located in Madison, WI.
### 2.3 Sample Budget for Option A: Joint Venture

** AFP Fundamentals of Fundraising Course  
*(based on 12 participants)*

<table>
<thead>
<tr>
<th>INCOME</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>Course Registration Income</td>
<td>$4,680.00</td>
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<tr>
<td>Sponsorship/partnerships</td>
<td>$500.00</td>
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</tbody>
</table>

**TOTAL INCOME COULD BE $5,180.00**

<table>
<thead>
<tr>
<th>EXPENSES</th>
<th>Amount</th>
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</thead>
<tbody>
<tr>
<td>Marketing materials &amp; postage</td>
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<tr>
<td>Printing 500 brochures</td>
<td>$150.00</td>
</tr>
<tr>
<td>Postage (300 @ $0.42)</td>
<td>$126.00</td>
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<tr>
<td>Mailing</td>
<td>$50.00</td>
</tr>
<tr>
<td><em>AFP Fundamentals of Fundraising Course</em> fee @ $195 x 12 participants</td>
<td>$2,340.00</td>
</tr>
<tr>
<td>Meeting room fees @ $300 x 2 days</td>
<td>$600.00</td>
</tr>
<tr>
<td>Lunches and breaks @ $30 per person x 12 persons</td>
<td>$360.00</td>
</tr>
</tbody>
</table>

**TOTAL EXPENSES $3,626.00**

**TOTAL NET REVENUE $1,554.00**

**NOTE:** Budgets will vary according to attendee (member/non-member), printing, advertising costs, meeting space rental, and food costs in your area. All amounts above are in U.S. Dollars.
### 2.4 Recommended Agenda: Two-Day Course

**AFP Fundamentals of Fundraising Course**

#### DAY 1

<table>
<thead>
<tr>
<th>Time</th>
<th>Module</th>
<th>INSTRUCTOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00-9:30</td>
<td>Module I: Overview of Fundraising</td>
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<tr>
<td>9:30-10:00</td>
<td>Module II: Developing an Integrated Fundraising Program</td>
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<tr>
<td>10:00-10:15</td>
<td><strong>Break</strong></td>
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<tr>
<td>10:15-11:45</td>
<td>Module II: Continued</td>
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<tr>
<td>11:45-12:45</td>
<td><strong>Lunch Break</strong></td>
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</tr>
<tr>
<td>12:45-3:00</td>
<td>Module III: Marketing for Ongoing Success</td>
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<tr>
<td>3:00-3:15</td>
<td><strong>Break</strong></td>
<td></td>
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<tr>
<td>3:15-5:30</td>
<td>Module IV: Building &amp; Sustaining Relationships</td>
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</tbody>
</table>

#### DAY 2

<table>
<thead>
<tr>
<th>Time</th>
<th>Module</th>
<th>INSTRUCTOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00-10:00</td>
<td>Module V: Securing the Gift</td>
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</tr>
<tr>
<td>10:00-10:15</td>
<td><strong>Break</strong></td>
<td></td>
</tr>
<tr>
<td>10:15-11:45</td>
<td>Module VI: Volunteers – Partners in Fundraising</td>
<td></td>
</tr>
<tr>
<td>11:45-12:45</td>
<td><strong>Lunch Break</strong></td>
<td></td>
</tr>
<tr>
<td>12:45-2:45</td>
<td>Module VII: Management &amp; Accountability</td>
<td></td>
</tr>
<tr>
<td>2:45-3:00</td>
<td><strong>Break</strong></td>
<td></td>
</tr>
<tr>
<td>3:00-4:45</td>
<td>Module VII: Continued</td>
<td></td>
</tr>
<tr>
<td>4:45-5:30</td>
<td>Course Completion: Closing chapter comments, celebration, presentation of certificates, etc.</td>
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</table>
2.5 Planning Tips

Assign one person to act as a liaison with the AFP International Headquarters. You will also need an on-site program monitor to act as host during the event. (This may be the same person in both instances.)

In developing your own promotional materials, please forward a draft of your promotional brochure and other related materials for review to the AFP IHQ prior to printing/distribution.

If you’re choosing to hold the AFP Fundamentals of Fundraising Course over two days you should arrange for meal functions and beverage service in close proximity to the meeting room used for the AFP Fundamentals of Fundraising Course. Course host(s) traditionally provides one lunch and morning and afternoon beverage breaks during the course.

If the AFP Fundamentals of Fundraising Course is being offered as part of a conference where other sessions will be held, you may want to prepare specially marked badges for AFP Fundamentals of Fundraising Course attendees (e.g., badges printed on different colored paper or bearing colored dots) as a means of assuring that only AFP Fundamentals of Fundraising Course attendees receive course materials.

Scholarships: It may be helpful to create a scholarship fund to support individuals who, for financial reasons, may be unable to attend the AFP Fundamentals of Fundraising Course. Scholarships are not offered through the AFP International Headquarters. You will still pay AFP IHQ half of $390/$490. The scholarship comes out of the course hosts’ budget or through a local area partner.

The first sources for scholarship funding may well be the networks used to promote the AFP Fundamentals of Fundraising Course. These networks may be willing to sponsor the attendance of a number of employees from their own organizations. Requests to United Way, the State Arts Council and other state departments, as well as faith-based groups may generate funds for scholarships.

Another source for scholarship funds is local foundations or corporations. These funding sources often have a strong interest in providing technical assistance to encourage the fundraising capabilities of nonprofit organizations.
2.6 Recruiting Faculty for the AFP Fundamentals of Fundraising Course

Faculty for the *AFP Fundamentals of Fundraising Course* is selected by the course host(s).

- It is recommended that faculty members for the *AFP Fundamentals of Fundraising Course* hold either a CFRE, ACFRE, Masters Degree or PhD credential. Individuals who are retired but who held the CFRE credential at the time of their retirement are also eligible to teach.
- **Most important is that each faculty member must be knowledgeable about the subject of the module he/she is to teach, and must be able to communicate effectively in front of a group.**
- A list of individuals who have graduated from AFP’s Faculty Training Academy (FTA) is available from the AFP IHQ website: [http://www.afpnet.org/Professional/content.cfm?ItemNumber=772](http://www.afpnet.org/Professional/content.cfm?ItemNumber=772). FTA graduates have been trained in adult learning theory and teaching techniques. These individuals are willing to serve as instructors and as resources to your *AFP Fundamentals of Fundraising Course* faculty members. They are also available by phone to offer suggestions on how to select good instructors. Travel and lodging expenses for these individuals are the responsibility of the chapter.
- It is fine for one person to teach more than one module if he or she is an expert in those subject areas.
- You may wish to have a back-up speaker available in case someone arrives late or fails to arrive.
- In selecting faculty members, please strive for diversity in gender, ethnicity, and organizational type.
- At least 4-6 weeks prior to the course, complete recruitment of all faculty members, and provide each with a Faculty CD, to give them plenty of time to prepare.
- Please do impress upon all faculty that all of them need to return the CD’s directly to you by the last day of the class, so that you can return them all to AFP IHQ; and thus they can be used again by other chapters in the USA and Canada as they conduct their classes. Also, please ask everyone not to write on either the disc or the protective envelope.
2.7 Marketing the AFP Fundamentals of Fundraising Course

It is recommended that a local planning committee be established to promote the AFP Fundamentals of Fundraising Course. In addition to sponsoring the course with other AFP chapters, it can also be effective to create a partnership with other local chapters of related organizations (such as ALDE chapters, local Planned Giving Councils, AHP regions, etc.) or other local service providers such as the United Way, the Voluntary Action Center or Support Center, a continuing education program within an institution of higher education, etc.

Targeting the Market
The marketing effort begins as soon as a signed contract is forwarded to the AFP International Headquarters. Marketing this program is very much like marketing the fundraising effort for an institution. First, the general markets must be targeted, and then specific prospects within each market must be identified.

Primary markets are:
• members of area AFP chapters who have 0-4 years of experience;
• attendees of past AFP chapter programs;
• fundraising professionals in your chapter’s area who are not currently members of AFP, but may be on a prospect list.

Additional markets include:
• advocacy organizations;
• arts, cultural and historical organizations;
• educational institutions including private, parochial, alternative and public schools, and colleges and universities;
• environmental groups;
• health and human service organizations;
• religious groups, synagogues and churches;
• United Way agencies.

Marketing Strategies
After the prospects have been identified, the planning committee must develop appropriate marketing strategies. The planning committee should also brainstorm local networks that might be useful to help promote the program.

1. Developing promotional materials
   Sample language for AFP Fundamentals of Fundraising Course fliers can be found in this packet, along with camera-ready art for a self-mailer, with space to insert the dates and location of your program.
   • Remember: materials should be targeted to the needs of your audience. You can brainstorm effective promotional messages and then test them with likely audiences before going to print.
   • If you have a local individual who has attended the AFP Fundamentals of Fundraising
In the past, ask this individual to provide testimonial for use in promotional materials.

2. **Using local networks**
   An important marketing strategy is to secure endorsements of networks to which your members may belong. These networks may be able to provide promotional support. For example, make arrangements with a network leader to direct a personalized letter to members. The letter can recommend attendance at the *AFP Fundamentals of Fundraising Course*. The course host(s) should provide a draft letter and a registration reply card.

Local networks might include:
- Faith-based groups, Regional, state, provincial, national religious bodies for the denomination, including outreach groups of those denominational bodies, etc.
- State agencies/departments with subgrantees including the state council on the arts and humanities; departments of health, elderly affairs and human services;
- United Way and the United Way Management Assistance Program (MAP)

3. **Ensuring personal follow-up**
   Even after local networks have been used and the promotional materials released, it may be necessary to do personal follow-up to prospective participants in order to ensure maximum attendance.

   Targeted prospects within each market should receive a telephone call. A script of key points to cover in the telephone call can be developed by the planning committee. Members of the planning committee as well as the AFP chapter Board of Directors should be assigned to call the prospects they know best.

**Benefits to your Chapter/Organization**

1. **Enhances your Chapter/Organization’s Image**
   Adopting the *AFP Fundamentals of Fundraising Course* significantly enhances the image of your chapter as a leadership community organization responding to the need of fundraising professionals’ basic learning objectives to work towards their certification. As a partner in this program, your chapter demonstrates to your members a commitment to ensure quality basic fundraising knowledge.

2. **Generates Significant Income**
   The *AFP Fundamentals of Fundraising Course* can also generate significant revenue for your chapter/organization through:
   - Member/Non-member sales;
   - Enhanced authorized provider fees;
   - Developing cross marketing relationships in the local fundraising service area; and
   - Opening doors for interest in members of other AFP programs/courses that your chapter/organization may offer
3. **Easy Implementation**

By partnering with AFP IHQ, you have the assistance and experience knowledge to host a course without any hiccups. The support system you will receive from AFP IHQ or chapters who have hosted in the past will help you host a successful course easily. The related costs are minimal compared to the profit that is possible to achieve.
## 2.8 Onsite Checklist for AFP Fundamentals of Fundraising Course Host(s)

<table>
<thead>
<tr>
<th>Done</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>On the day of the <strong>AFP Fundamentals of Fundraising Course</strong>, arrive an hour and 15 minutes before the start of the course. Check that room set-up is correct. (tables, chairs, computer, LCD projector, and CD with PowerPoints, screen, flipchart(s), table for presenter in front of room, and registration table).</td>
</tr>
<tr>
<td></td>
<td>Place sign-in sheet, agenda copies, participant roster, and participant manuals on registration desk. Lay out name badges and/or name tents - alpha by last name makes finding a name easy. Have blank badges/tents and markers ready for on-site registrants.</td>
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<tr>
<td></td>
<td>Lay out faculty name badges.</td>
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<td></td>
<td>Set out any AFP promotional materials, etc.</td>
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<tr>
<td></td>
<td>As participants arrive, give them their name badge and/or tent, manual, agenda, and participant list. <strong>Important:</strong> Have participants sign the sign-in sheet. This sheet <strong>must</strong> be signed in order for a participant to receive a certificate. It is the responsibility of the on-site coordinator to be sure all participants sign the roster at the beginning of each day.</td>
</tr>
<tr>
<td></td>
<td>Any unregistered participants should complete an on-site registration form and sign in on the sign-in sheet. On-site registrants may pay on-site by check or credit card depending on how the chapter is able to collect money.</td>
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<tr>
<td></td>
<td>As faculty members arrive, give them their name badges. Have someone available to assist them setting up. Let each faculty member know you will signal them when they have five (5) minutes remaining in their session.</td>
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<tr>
<td></td>
<td>At the designated starting time, begin the <strong>AFP Fundamentals of Fundraising Course</strong> with introductions.</td>
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<td></td>
<td>Introduce each faculty member at the beginning of each module.</td>
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<td></td>
<td>Signal each faculty member when five (5) minutes remain in his/her session. At the end of the session, publicly thank the faculty member.</td>
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<td></td>
<td>Announce when breaks begin and end, and where food is being served if you are providing lunch. Be persistent in getting the program started on time after each break.</td>
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<td></td>
<td>After the last module of the day, thank participants for coming and remind them what time tomorrow’s session will begin.</td>
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<td>During the second day, remember to have each participant sign the sign-in sheet.</td>
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<tr>
<td></td>
<td>Towards the end of the day, sign the certificate of completion for each participant who has attended the <strong>entire AFP Fundamentals of Fundraising Course</strong>.</td>
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<tr>
<td></td>
<td>At the close of the <strong>AFP Fundamentals of Fundraising Course</strong>, remind participants to complete the online evaluation form within the next few days. The link to the evaluation can be found on the course evaluation forms at the end of each module or by visiting the following website: <a href="http://vovici.com/wsb.dll/s/c13g43da1">http://vovici.com/wsb.dll/s/c13g43da1</a></td>
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<tr>
<td></td>
<td>Distribute the certificates of completion, and thank everyone for attending.</td>
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<tr>
<td>Collect ALL Faculty CD’s from all faculty who have not yet returned them to you</td>
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<tr>
<td>Prepare materials for shipment back to the AFP IHQ within 5 days of the course. Be sure to return all of the following:</td>
<td></td>
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<tr>
<td>• All Faculty CD’s</td>
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<tr>
<td>• Class Roster</td>
<td></td>
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<tr>
<td>• Extra participant manuals</td>
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<tr>
<td>• AFP IHQ monies</td>
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</tbody>
</table>

**Congratulations and Thank You! Your AFP Fundamentals of Fundraising Course is completed!**
The AFP Fundamentals of Fundraising Course 2014

The AFP Fundamentals of Fundraising Course was developed with a foundation from the Essentials of Fundraising Program and the First Course and is composed of seven modules that have been designed by experienced fundraising professionals to meet the real-world needs and challenges nonprofit organizations face every day. This 16 hour program includes case studies and projects for groups and individuals, making the learning experience both substantive and enjoyable. The AFP Fundamentals of Fundraising Course offers a complete overview of the development function, featuring the most current information and techniques.

This intensive program will provide an overview of skills, techniques, and program components for individuals with 0 to 4 years of fundraising experience.

The modules are:
Module 1: Overview of Fundraising
Module 2: Developing an Integrated Fundraising Program
Module 3: Marketing for Ongoing Success
Module 4: Building & Sustaining Relationships
Module 5: Securing the Gift
Module 6: Volunteers – Partners in Fundraising
Module 7: Management & Accountability

For more information on AFP’s educational programs, contact the Professional Advancement Coordinator, AFP, 4300 Wilson Blvd., Suite 300, Arlington, VA 22203. Phone: (703) 519-8494; Fax: 703/684-0540; E-mail: proadv@afpnet.org.

Course Location and Cost Information

[Insert Course Information Here, including location, dates, instructors, and cost]
2.10 AFP Fundamentals of Fundraising Course Faculty Recommendation Form (Sample)

Whom would you recommend to serve as faculty for each of the following modules? (CFRE or ACFRE is suggested; if you haven't heard the individual speak, please provide the name of a reference for the person's speaking ability; please attach curriculum vitae, or ask the individual to send a curriculum vitae to the Professional Advancement Division at IHQ).

<table>
<thead>
<tr>
<th>Module</th>
<th>Full name(s)</th>
<th>Organization(s)</th>
<th>Street Address</th>
<th>City/State/Zip</th>
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<tbody>
<tr>
<td>Module I:</td>
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<tr>
<td>Overview of Fundraising</td>
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<td>Module II:</td>
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<td>Developing an Integrated Fundraising Program</td>
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<td>Module III:</td>
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<td>Marketing for Ongoing Success</td>
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<td>Module IV:</td>
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<td>Building and Sustaining Relationship</td>
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<td>Module V:</td>
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<td>Securing the Gift</td>
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<td>Module VI:</td>
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<td>Volunteers – Partners in Fundraising</td>
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<td>Module VII:</td>
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<td>Management &amp; Accountability</td>
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2.11 AFP Fundamentals of Fundraising Course Sign-in Sheet (Sample)

<table>
<thead>
<tr>
<th>Full Name (please print)</th>
<th>Address</th>
<th>City / State/Province / Zip/Postal Code</th>
<th>Member / Non-Member</th>
<th>Email</th>
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The **AFP Fundamentals of Fundraising Course** is a 16-hour intensive program that will provide an overview of skills, techniques, and program components for individuals with 0 to 4 years of fundraising experience. The course was developed with a foundation from the Essentials of Fundraising Program and the First Course in Fundraising. It is composed of seven modules that have been designed by experienced fundraising professionals to meet the real-world needs and challenges nonprofit organizations face every day.

The suggested fees for the **AFP Fundamentals of Fundraising Course** for 2014 are $390 AFP members and $490 nonmembers. The course host(s) may change the registration fees but the financial arrangements that follow remain the same.

- **Course Host definition:** Sponsoring entity (example – AFP Chapter, University, 501C3, Hospital, etc.) who is going to host the course after agreeing to the Authorized Provider requirements.

**Note:** A deposit fee of $1,000.00 in U.S. dollars must be received once the decision has been made to host the course to cover faculty and participant product. The deposit should be provided as early as possible; but it must be received no later than 60 days prior to the planned start date of the Course, or the course will not be conducted as scheduled. If a deposit is not received, and the course is cancelled after receiving faculty/participant materials, the course host(s) will receive an invoice for shipping and fulfillment and will be required to return all materials to AFP IHQ. Once paid, the deposit is not returned in the event of a cancellation but rather applied to a future course.

**Financial Arrangements**

All expenses related to the course (meeting room, meals, breaks, faculty travel expenses, faculty gifts) will be paid by the course host(s). The course host(s) may charge course registrants a fee higher than the normal course fee if extra funds are needed to cover expenses related to supplementary meals or functions (e.g., a special reception, full breakfast, exhibit hall, etc.). Materials being shipped to Mexico or Canada will incur separate shipping fees. All payments to AFP International Headquarters must be made in U.S. dollars, by credit card or check from a bank account in U.S. Dollars.

**Option A: Joint Venture** - Can be offered in conjunction with AFP IHQ by any sponsoring entity.

The course host(s) will collect the registration fees, and will reimburse AFP IHQ $195 member/$245 non-member per participant. This course includes complimentary faculty materials, blank badge stock with AFP logo, completion certificates, course roster sign-in sheets, and participant manuals (you will not be charged for manuals that are returned to AFP IHQ) at the close of the course to AFP IHQ). Unused participant manuals retained by the course host will be invoiced at $50 each.

**Option B: AFP Member Franchise Fee** - Can only be offered by an AFP Chapter and/or an AFP Business Member, to include Endorser and Executive Circle Business Members

The franchise fee is $2,900.00 per one-time use of the **AFP Fundamentals of Fundraising Course**. The course host(s) will collect all course registration fees. The course host(s) will payout $2,900.00 plus $50.00 per participant manual used (you will not be charged for manuals that are returned to AFP IHQ) at the close of the course to AFP IHQ). Unused participant manuals retained by the course host will be invoiced at $50 each. This course includes complimentary faculty materials, blank badge stock with AFP logo, completion certificates, and course roster sign-in sheets.

**Option C: Non-AFP Member Third Party Franchise Fee** – Can be offered by a non-AFP Chapter or Non-Business Member

The third party franchise fee is $5,000.00 per one-time use of the **AFP Fundamentals of Fundraising Course**. The course host(s) will collect all course registration fees. The course host(s) will payout $5,000.00 plus $50.00 per participant manual used (you will not be charged for manuals that are returned to AFP IHQ) at the close of the course, but course host will incur shipping costs for unused manuals. Unused participant manuals retained will be invoiced at $50 each. This course includes complimentary faculty materials, blank badge stock with AFP logo, completion certificates, and course roster sign-in sheets.
Course Host(s) Responsibilities:

- Completing, signing and submitting the Agreement form, along with $1,000 deposit (at least two months prior to the planned start date on the Agreement Form),
- Providing a street address and not a PO Box for the shipment of CD’s, manuals, certificates, etc. Shipments to you will come either UPS or FedEx; and neither can deliver to a PO Box.
- Selecting faculty
- Registering participants; collecting registration fees
- Selecting a meeting facility and making on-site food and beverage arrangements
- Marketing the program
- Designating an on-site coordinator to greet participants, introduce faculty, and handle other on-site logistics for the course
- Disperse faculty materials to individual faculty once materials are received from AFP IHQ
- Return all unused course materials to AFP IHQ
- return All Faculty CDs and non-disclosure form to AFP IHQ

AFP IHQ Responsibilities:

- Reviewing course faculty
- Shipping course materials to course host(s) (Faculty CDs and participant manuals, Non-disclosure agreement, blank badge sheets, certificates, sign-in sheets)

*Please see the AFP Fundamentals of Fundraising Course Host Toolkit for more detailed information on the responsibilities of AFP IHQ and the course host(s).

Intellectual Property (IP) - Authorized Provider

An Authorized Provider is a Course host - Sponsoring entity (example – AFP Chapter, University, 501C3, Hospital, etc.) that has a signed Authorized Provider Agreement with AFP IHQ to provide AFP instructional programs in accordance with the standards and objectives of the program they desire to teach. An approved Authorized Provider Agreement must be on file with AFP IHQ before you can host AFP IHQ courses. There is no fee, except where noted, to become an Authorized Provider. Becoming an Authorized Provider permits you to offer the specific AFP course on a one-time basis. Each time you wish to host an AFP course, you must sign on to another Authorized Provider and Course Agreement. As an Authorized Provider, you adhere to the fact that offering this course and/or any of the content within the course without previously signing a Course Agreement with AFP IHQ is against AFP IHQ standards and ethical codes. AFP IHQ has the official rights to this course and has the right to refuse your agreement due to instances that would/have broken the authorized provider regulations.

By signing this agreement, you agree to offer this course as an Authorized Provider and therefore adhere to the above statement.

IMPORTANT NOTE: BEFORE PLANNING THIS COURSE, PLEASE MAKE SURE YOU HAVE REVIEWED THE COMPLETE FUNDAMENTALS OF FUNDRAISING COURSE 2014 HOST TOOLKIT.
The _________________ Chapter(s)/Organization(s) agrees to host the AFP Fundamentals of Fundraising Course
in _________________ (city, state) on ________________________________ (date).

Choose a pricing model for your course:

- Option A: Joint Venture
- Option B: AFP Member Franchise Fee
- Option C: Non-AFP Member Third Party Franchise Fee

*See first page for definitions.

List the course host(s) contact that will be in charge of coordinating this course:

<table>
<thead>
<tr>
<th>Name</th>
<th>Organization</th>
<th>Address</th>
<th>City/State/ZIP</th>
<th>Phone</th>
<th>Fax</th>
</tr>
</thead>
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</table>

Where would you like the faculty and participant materials mailed? __________________________________________

Please list the course location, address, phone and fax numbers:

<table>
<thead>
<tr>
<th>Location</th>
<th>Address</th>
<th>City/State/ZIP</th>
<th>Phone</th>
<th>Fax</th>
</tr>
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</table>

If the course host(s) plans to charge participants an additional fee (for extra meals or services), please list the total fee amount:

- Base fee $390 + _____ = $_____ AFP Members
- Base fee $490 + _____ = $_____ All Others

I have discussed the option checked above with my Chapter/Organization Board and agree to the terms as stated. If the AFP Fundamentals of Fundraising Course is being co-sponsored with another host, the signature of each course host president is required.

<table>
<thead>
<tr>
<th>Signature of Chapter/Organization President</th>
<th>Chapter/Organization</th>
<th>Date</th>
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<table>
<thead>
<tr>
<th>Signature of Chapter/Organization President</th>
<th>Chapter/Organization</th>
<th>Date</th>
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</tbody>
</table>

The AFP Fundamentals of Fundraising Course is a copyrighted course and may not be reproduced without the express written permission of the Association of Fundraising Professionals.

Please complete the agreement form and return it to AFP, Attn: Professional Advancement Div., 4300 Wilson Blvd., Suite 300, Arlington, VA 22203; phone (703) 519-8465/fax (703) 684-0540 or email proadv@afpnet.org.
AFP Fundamentals of Fundraising Course Host Agreement Form

I hereby acknowledge that I understand the following:

1. That course materials provided on the AFP Fundamentals of Fundraising Course CD are the exclusive property of the Association of Fundraising Professionals (AFP).

2. This agreement does not imply a license or right, whatsoever concerning the intellectual property of AFP. For the purposes of this Agreement, “intellectual property” shall mean: all trademarks and service marks registered and/or used by AFP, as well as any right, invention (patented or not), industrial designs, utility models, confidential information, commercial names, commercial signs, copyrights, domains, as well as any other intellectual property right protected by law.

3. The course materials are the exclusive property of AFP and are protected by federal copyright law. They are for one-time use of faculty members for purposes of teaching the AFP Fundamentals of Fundraising Course, and they, and any other form of intellectual property of AFP, may not be reproduced or used for any other purpose without the written permission of AFP.

Print Name ___________________________ Signature ___________________________

Course Location ___________________________ Date ___________________________

Please sign and return this form to:
AFP Professional Advancement
4300 Wilson Blvd., Suite 300
Arlington, VA 22203
proadv@afpnet.org
Attn: Professional Advancement Division
4300 Wilson Boulevard
Suite 300
Arlington, VA 22203
Phone 703-519-8465 Fax 703-684-0540

To:
(Please indicate Chapter Coordinator of Course)

Comments or special instructions:

<table>
<thead>
<tr>
<th>QUANTITY</th>
<th>DESCRIPTION</th>
<th>UNIT PRICE</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Deposit - Instructor &amp; Participant Products (Fundamentals of Fundraising Course)</td>
<td>$1,000.00</td>
<td>$1,000.00</td>
</tr>
</tbody>
</table>

*Please return copy of invoice with payment – Thank you

Accounting code – 4500-40-430

Payment must be received prior to shipment of the AFP CFRE Review Course materials and be paid in US Funds.

Method of payment (check one):
- Check enclosed payable to AFP
- Credit Card (Specify type: VISA/MasterCard/American Express/Discover)

Credit Card # ______________________________________________

*CVV Code: ______________________ Expiration Date: ____________
3 digit code on back of card

Name as it appears on card: ________________________________

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