

# INTERNATIONAL ADVANCED DIPLOMA IN FUNDRAISING

STUDENT HANDBOOK



## WELCOME FROM JASON LEE



It gives me great pleasure to congratulate you on your decision to pursue the International Advanced Diploma in Fundraising. On behalf of the Association of Fundraising Professionals, I welcome you to a rigorous and essential course that defines new standards for fundraising education based on global trends and cultural influences in charitable giving.

This is a critical investment in your professional development. As the world – and the fundraising profession – become increasingly interconnected, those of us in the charitable giving sector need a broad world view of giving to heighten our ability to think critically, strategize and analyze. These are no longer preferred skills for senior fundraisers in an interdependent global community; they are requisite skills to generate real impact in your organization and in a complex and interconnected world.

**Jason Lee,**  
**Interim President & CEO**  
**Association of Fundraising Professionals**

## WELCOME FROM PETER LEWIS



I am delighted to be welcoming students from across the globe joining the International Advanced Diploma in Fundraising (IADF) qualification course. Following its successful launch in 2014 this ground-breaking course is the result of a truly international alliance which has combined expertise and knowledge from three fundraising associations - The Association of Fundraising Professionals (AFP), European Fundraising Association and the Institute of Fundraising (IoF). Students joining this course are helping us build an exceptional, world-class workforce capable of leading and shaping the future of fundraising.

A particularly exciting development for 2016-17 is that the UK and US teaching timetables have been arranged to enable much greater engagement between students. For the first time, students will have regular opportunities to collaborate online via interactive discussion boards while they cover the same topics. This development will further strengthen the international outlook our students will develop as they advance their fundraising knowledge and practice and build a range of high level transferrable thinking skills.

I wish students every success in their learning and fundraising. Together, we can achieve excellent fundraising for a better world.

**Peter Lewis,**  
**Chief Executive**  
**Institute of Fundraising**

## WELCOME FROM PROFESSOR NIKOLAOS TZOKAS



I am delighted to welcome you to the International Advanced Diploma in Fundraising (IADF). I am particularly delighted that you have chosen to study with the team from the Centre for Sustainable Philanthropy at Plymouth University. Our world-class faculty and our creative scholarly community put us at the forefront of new developments in fundraising research and teaching and we are proud to bring these to bear on the delivery of your course. You've embarked on a significant program of study that equates (in terms of the number of hours of study and the level of that study) with a third of a Masters degree. Although the course isn't taught for university credit per se we would be proud to welcome graduates from the International Advanced Diploma in Fundraising to top up to one of a range of Masters Degrees that we offer in Plymouth Business School.

The IADF is a multi-disciplinary course drawing on the fields of economics, psychology, organizational behaviour, social psychology and marketing. We are proud to have constructed a program that is both academically rigorous, drawing on the latest research, but also practically relevant equipping you with the skills you will need to achieve excellence in fundraising in your organization.

Each student we admit contributes a special element of the exciting scholarly dialogue we experience in our classrooms, in our labs, online and in the internationally regarded publications of faculty and students. We hope you will enjoy your time studying with us and take full advantage of the opportunities to deepen and enrich your learning provided by the course team.

Should you have questions about topping up to a full Masters on completion of your IADF studies I encourage you to contact the academic team directly and inquire how we may be able to help you further.

In the meantime the very best of luck with your course! I hope you have an enjoyable learning experience and that the program not only meets but exceeds your expectations.

**Professor Nikolaos Tzokas**  
**Executive Dean, Faculty of Business**  
**Plymouth University**

## PROFESSOR ADRIAN SEARGENT



Adrian Sargeant is Professor of Fundraising at Plymouth University and Director of the Centre for Sustainable Philanthropy. He is the world's foremost fundraising academic, formerly holding the Hartsook Chair in Fundraising at the Lilly Family School of Philanthropy at Indiana University. He also holds visiting appointments at Avila University and the Australian Centre for Philanthropy and Nonprofit Studies, Queensland University of Technology. He has received many awards for his services to the profession, notably being named to the prestigious Nonprofit Times Power and Influence List in the United States in 2010. In the UK he received a Civil Society Award for his Outstanding Contribution to Fundraising.

He is probably best known for his work on donor retention and loyalty, although he has also studied nonprofit branding, e-fundraising and bequests. His work has been funded by the Economics and Social Research Council, the Aspen Foundation, Indiana University, the Association of Fundraising Professionals and the Institute of Fundraising.

His work has also been funded by a plethora of different nonprofits in the United Kingdom and the United States including organisations as diverse as the American Cancer Society, Habitat for Humanity, the Royal Society for the Prevention of Cruelty to Animals, the Royal National Lifeboat Institution, Concern Worldwide and Sightsavers.

His work has appeared in many scholarly journals including the Journal of Business Research, Journal of Marketing Management, European Journal of Marketing, Nonprofit and Voluntary Sector Quarterly and Nonprofit Management and Leadership.

Professor Sargeant developed the UK's National Occupational Standard for Fundraising (specifying the skills and knowledge required of fundraisers working in a variety of different roles within the profession) in 2006 and a new suite of fundraising qualifications for the Institute of Fundraising in 2010. Also in 2010 he received the Civil Society Award for his Outstanding Contribution to Fundraising and was named to the prestigious Nonprofit Times' Top 50 Power and Influence List. He was also voted the 3rd most influential person in fundraising by readers of Fundraising magazine.

## PROFESSOR JEN SHANG



Jen Shang is a Philanthropic Psychologist and Director of Research at the Centre for Sustainable Philanthropy at Plymouth University. Her research and teaching focus on the 'Why's' in understanding the psychology of philanthropy as the only true way of enhancing its practice.

Her past research studies how identity (one's sense of who we are) influences giving and how giving enriches identity. This work has been published in journals including *Economic Journal*, *Experimental Economics*, *Journal of Marketing Research*, *Marketing Science*, *Organisational Behavior and Human Decision Processes*, *Marketing and Psychology* and *Nonprofit Management and Leadership*. It has been awarded by the National Science Foundation, The Aspen Institute, the Corporation for Public Broadcasting, the Association of Fundraising Professionals, the Hewlett Foundation and the Rockefeller Foundation. This work has been covered by the BBC, Guardian, New York Times, the Chronicle of Philanthropy, *Advancing Philanthropy*, *Nonprofit Times*, *Professional Fundraising* and the Third Sector. She is the author of *Fundraising: Principles and Practice*.

Jen is genuinely passionate about forging the link between academic research and professional practice and would see her research as contributing to the quality of nonprofit marketing/fundraising, increasing participation in philanthropy, and enhancing the quality of individual's philanthropic experience. She has worked with over 100 nonprofit organisations including internationally respected organisations such as American Red Cross, National Public Radio and PBS in the US and United Christian Broadcasters,

British Red Cross, WWF, British Heart Foundation, NSPCC, Save the Children, British Legion, Cancer Research UK and RSPCA in the UK.

Jen is deeply committed to promoting the teaching of philanthropic psychology and fundraising. "Teaching in my view, should go beyond simple techniques or knowledge transfer and provide students with the values, visions and passions that have the potential to transform real-world practice." Jen utilises modern teaching approaches including active-learning, Just-in-Time teaching, Decoding-the-discipline and group-based techniques.

These techniques enable the educator to promote transformative lifelong learning in their students. Jen's commitment to teaching was recognised by Indiana University through its annual Trustee's Teaching Award and was recognised by the professional body of fundraising (Institute of Fundraising in the UK) by the appointment to be their Chief Examiner.

## SIMONE P. JOYAUX



Simone P. Joyaux, ACFRE is described internationally as one of the nonprofit sector's "most thoughtful, inspirational and provocative leaders". She's an expert in fund development, board and organisational development, strategic planning, and management. Clients – located throughout the U.S. and in other countries – include all types and sizes of nonprofits / NGOs.

For Simone, philanthropy is both an avocation and vocation. She's a regular volunteer and financial donor. Simone and her life partner have bequeathed their entire estate to charity.

Simone speaks internationally, developing seminars, keynotes and plenaries for conferences in places like The Netherlands, Mexico, Australia, New Zealand, France, Italy, Slovakia, and throughout North America. Since 2000, she has served as a faculty member for the Master of Arts in Philanthropy and Development at Saint Mary's University, Minnesota.

Her book, *Keep Your Donors: An Essential Guide to Better Communications and Stronger Relationships*, co-authored with Tom Ahern, receives rave reviews. Her book *Strategic Fund Development: Building Profitable Relationships That Last* – called a classic – was first published in 1997, and is now in its 3rd edition. *Firing Lousy Board Members – And Helping the Others Succeed*, is her newest book, published in 2014. Simone has also contributed chapters to several other books, including *The Nonprofit Consulting Playbook*.

Simone blogs at [www.simonejoyaux.com](http://www.simonejoyaux.com) (Simone Uncensored) and writes a regular web column for the *Nonprofit Quarterly*, [www.nonprofitquarterly.org](http://www.nonprofitquarterly.org). Her website includes a free resource library, weekly blogs that offer tips and resources, and a monthly e-news.

Simone has 40 years' experience as staff (executive director and chief development officer), consultant, and board member in the nonprofit sector. She began her own fulltime consulting practice in January 1988. As a volunteer, Simone serves regularly on boards. Currently, she chairs the Advisory Board of the Centre for Sustainable Philanthropy, Plymouth University, U.K. She chairs the Board of Directors of Planned Parenthood of Southern New England. Simone is a former chair of CFRE International, the baseline-credentialing program for fundraisers.

Simone has founded two NGOs, the Women's Fund of Rhode Island (2000), a social justice organisation, and in 1984, the first statewide arts advocacy organisation in Rhode Island.

In 1994, Simone was one of the first to achieve the credential of Advanced Certified Fund Raising Executive (ACFRE). In 2015, as a member of the first cohort, Simone completed the International Advanced Diploma in Fundraising with distinction.

Simone has an MA in English and French literature from Michigan State University and participates in various trainings in the nonprofit sector.

## PESH FRAMJEE



Pesh Framjee is a partner at Crowe Clark Whitehill where he has led the not-for-profit unit since September 2008. Before that he was a partner and head of non-profits at Deloitte.

He is a chartered accountant and a member of the Charity Law Association. He sits on the board of the Institute of Risk Management and the Institute of Contemporary Art.

He writes and lectures internationally on issues facing the charity sector and is joint author of *Charities – The Law and Practice*, and has written a book on the tax, accounting and legal implications of charity trading. He is also a special advisor to the Charity Finance Group (CFG) and a member of the Charity SORP Committee.

# MODULE 1: DEVELOPING A STAKEHOLDER FOCUSED ORGANISATION

This module explores how senior management can inculcate an institutional focus on stakeholders. It explains that delivering such a focus requires both new systems and procedures to ensure that stakeholder needs are at the core of the organisation, but also a change in culture to value the new paradigm.

The module then moves on to examine practically what a focus on stakeholders requires, including the development of service standards and procedures.

The module concludes with a consideration of the primary benefits that an institutional focus on stakeholders can deliver most notably building loyalty and enhancing lifetime value. We will examine the roles of satisfaction, commitment and trust in delivering these benefits and the tangible steps that organisations can take to manage them.

Finally, the module will explore the latest research and thinking on identity and how fostering the bond of identification be it with the nonprofit, cause or beneficiary group, can also build loyalty and lifetime value, while at the same time enhancing the value returned to supporters.

## ADVANCED KNOWLEDGE AND UNDERSTANDING

### Orientation

Product, sales and market orientation. Societal orientation, determinants of degree of societal orientation. Principles of change management. Organisational culture: definition, frameworks for understanding culture, typologies of organisational culture, relationship between culture and strategy, impact of culture on performance at individual, departmental and organisational levels.

### Principles of effective stakeholder service

The factors that make stakeholders satisfied, the importance of achieving stakeholders satisfaction, how to measure the level of stakeholders service being provided. Best practice in integrated stakeholder service, techniques and reward strategies for motivating staff and volunteers. Process/ systems design and management. Service blueprinting. Principles of effective complaint handling.

### Stakeholder loyalty

Definition of loyalty, degrees and types of loyalty, the value of loyalty to a non-profit, concept of donor lifetime value, loyalty ladder/ frameworks, types of bonding (financial, structural, social), need to focus on higher value donors. Drivers of loyalty: reasons for stakeholder (mainly donor attrition, underlying relationship factors including satisfaction, trust and commitment). Key determinants of satisfaction and commitment. Relationship fundraising/ marketing: principles of relationship marketing/fundraising, planning donor journeys, establishing retention programs (welcome, upgrade, cross-sell, engagement, stewardship and reactivation). Collecting and using volunteered and behavioural information for personalisation, use of LTV to drive differentiated propositions. Monitoring and evaluation: calculation and interpretation of key loyalty metrics.

### Stakeholder identity

Definition of stakeholder identity, degrees and types of identities, the value of identity to a nonprofit, the meaning of identity to an individual, and how a stakeholder's identity might lead to more behaviours beneficial to the organisation and how a beneficial behaviour to the organisation reinforces stakeholder's identity. Key determinants of strong stakeholder identification with an organisation. Identity fundraising/marketing: principles of identity based marketing/fundraising, planning stakeholder's identity development, establish stakeholder empowerment program (as a way of strengthening stakeholder identification with an organisation and create behavioural transitions of committed involvement within the organisation during life and after death). Monitoring and evaluation: calculate and interpretation of key identity metrics.

## Stewardship

Concept of stewardship, obligations of the nonprofit, obligations of the fundraising team. Design of stewardship processes and procedures. Stakeholder recognition and development. The strategic application of identity-based principles in stewardship.

Representing fundraising to the Board (and other high-impact stakeholder groups)

Principles of accountability and transparency. Fundraising legislation, regulation, ethics and codes of fundraising practice. How to calculate and explain the costs of fundraising incurred by an organisation. The difference between restricted and unrestricted funds and the fundraising/legal implications. The importance of donor retention, loyalty and empowerment. Current trends in public perceptions of nonprofit organisations and current fundraising practice. Current trends in media perceptions of nonprofit organisations (and their sub-sectoral differences) and current fundraising practice.

Working collaboratively with the Board

Assessment of Board profile and development needs. Recruitment and selection of Board membership. Cultivation of Board leadership. Working with ineffective leadership. Development of under-performing Board members. Understanding, monitoring and management of changes in Board expectations and roles. Supporting the CEO in managing the Board.

## ADVANCED FUNDRAISING SKILLS

By the end of this module you should be able to:

1. Critically evaluate the degree and the effectiveness of an organisation's societal orientation.
2. Identify how the degree and the effectiveness of societal orientation might be improved in a nonprofit organisation.
3. Design, supervise, evaluate and improve, appropriate systems to deliver high quality stakeholder service.
4. Design, supervise, evaluate and improve appropriate complaint handling systems.
5. Design, implement, evaluate and improve a relationship fundraising strategy.
6. Design, supervise, evaluate and improve identity-based stakeholder empowerment strategy.
7. Design, supervise, evaluate and improve stakeholder care, recognition and stewardship processes.
8. Critically analyse a range of long-term performance metrics and creatively design strategy as a result.
9. Represent fundraising issues appropriately to the Board and manage Board member understanding (and expectations) of the fundraising function and their own role in enhancing its performance.

## **MODULE 2: INTEGRATED MARKETING COMMUNICATIONS**

This module sets fundraising in its wider institutional context and develops the theme of integration from the Diploma. It examines the other major forms of communication likely to be initiated by a nonprofit, discusses the planning and operationalisation of each and explores opportunities for integration, drawing activities together into a national campaign. A wide range of marketing communications is considered. It also considers how fundraisers can overcome the more common barriers to working collaboratively with other departments. Types and sources of potential conflict and misunderstandings and their potential resolutions are explicitly explored. The course is designed to prepare you for a senior role managing integrated marketing communications.

### **ADVANCED FUNDRAISING KNOWLEDGE**

Integrated marketing communications

Communications strategies, objectives, communications mix (including online communications mix), communications media and best practice in relation to each, communications planning, media neutral planning, benefits of appropriate campaign integration. Legal and ethical requirements for nonprofit communications including privacy and data protection.

Working with other stakeholder groups

Understanding of the link between organisational structure and fundraising performance. Types and sources of conflict, conflict awareness and management. Negotiation, influence and power. Development of an organisational learning culture.

### Creativity in marketing communications

Definitions of creativity and creative systems, management of creativity in self, others and teams (motivational theories, sources of control and constraints). Management of creativity in organisational strategy: open systems, continuity and change.

### Branding

Definitions, role and nature of a brand. Benefits and drawbacks of branding. Models of brand, approaches to branding, evaluating and enhancing brand value. Brand development and testing, including importance of stakeholder consultation and buy-in. Brand personality and values. External and internal branding. Stakeholder identification with the brand. Strategic brand management.

### Social marketing and campaigning

Distinction between social marketing, campaigning and education. Social marketing mix, upstream and downstream social marketing activity. Design activity. Design and implementation of social marketing communications, campaigning, lobbying. Elements of consumer behaviour, perception, motivation, learning, attitudes and behaviour change.

### Working with external agencies

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

## ADVANCED FUNDRAISING SKILLS

By the end of this module you should be able to:

1. Critically evaluate an organisation's current approach to marketing communication planning and its impact on philanthropic performance and outcomes.
2. Design, supervise and evaluate an integrated marketing communications plan.
3. Develop communications consistent with best practice and relevant legal/ethical requirements.
4. Create an appropriate working environment to foster creativity to strengthen the philanthropic capabilities of the organisation.
5. Develop, design and implement a social marketing mix to achieve a specified behaviour change.
6. Brief, select, work productively with and critically evaluate a range of communications agencies.
7. Develop, manage and evaluate an organisation's brand(s).
8. Calculate, interpret and utilise a range of communications metrics.
9. Understand how different forms of communications can impact on fundraising performance.
10. Work synergistically with other communications functions to optimise performance.
11. Work synergistically with other communications functions to optimise their performance.
12. Represent the fundraising function to other stakeholders within the organisation.

## MODULE 3: STRATEGIC FUNDRAISING MANAGEMENT

The third module continues the planning theme begun in the Diploma. In the International Advanced Diploma in Fundraising the focus is firmly on fundraising strategy and the management of a fundraising portfolio. We are no longer concerned with the planning of one area of fundraising activity, but rather the complete range of activities in which an organisation might engage. There is a strong numerical component and you will be expected to set and justify a detailed budget that accounts appropriately for risk. You will also be expected to make a case for investment in new or embellished aspects of the fundraising mix. There is a similarly strong input on assessing fundraising performance and the design, implementation and interpretation of performance metrics. The module then concludes with a detailed consideration of how the performance of fundraising should be reported, both to the public and to the Board. You will also learn of the wider implications of their reporting for public trust and confidence in the sector at large.

### ADVANCED FUNDRAISING KNOWLEDGE

#### Strategic fundraising audit

Purpose of a fundraising audit, structure and content. Principles of market research, correlational versus causal relationships, secondary versus primary data, internal and external sources of secondary data, qualitative/quantitative research methods, commissioning of primary research, interpretation of research data, evaluation of research conclusions. External fundraising audit: PESTLE Analysis, competitor analysis, collaborative analysis, market analysis, supporter/stakeholder analysis. Internal fundraising audit: product/service lifecycle, nonprofit portfolio analysis, reasons why for-profit portfolio models are inappropriate, calculation of simple fundraising metrics (e.g. response rates, ROI, historic/lifetime value), strengths/weaknesses of organisational structures and cultures. SWOT Analysis: strengths, weaknesses, opportunities and threats analysis, methods of prioritising factors, interpretation of findings.

#### Fundraising planning

Benefits and drawbacks of planning, approaches to planning, structure(s) for an integrated fundraising plan. Fundraising objectives: importance of SMART objectives, objective setting, categories of fundraising objective. Fundraising strategy: fundraising cycle, overall direction, segmentation, positioning, targeting and fundraising portfolio management fundraising tactics – advantages, disadvantages and best practice in relation to each key form of fundraising. Monitoring/Evaluation: importance of fundraising metrics. Use of Key Performance Indicators (KPIs) and contingency planning. Real-time improvement updates.

#### Assessing fundraising performance

Return-on-investment models, post-investment appraisals, actual performance versus objectives, brand valuation, RFM, RFV models, donor lifetime value models, impact on brand attributes, cross-selling rates, upgrade rates, loyalty/attrition rates, stakeholder satisfaction and commitment. Behaviour of fundraising costs: definitions, differences between fundraising administration and program costs, average versus marginal costs, key drivers of fundraising cost, fundraising ratios (including FCE and FACE ratios) and how to calculate them, reasons why ratios produced from published accounts cannot be used as the basis for comparison between organisations, principles of effective benchmarking.

#### Resource planning and control

Cost-benefit analysis, resource planning techniques, critical path analysis, budgeting, performance measures, management reporting, full cost recovery. Risk Management: risk assessment, analysis and evaluation, risk control and treatment and risk communication. Management controls: control defined, basic control concepts, responsibility accounting, approaches to control, controls, behavioural aspects of control, taking corrective action.

## **ADVANCED FUNDRAISING SKILLS**

By the end of this module you should be able to:

1. Supervise and conduct a strategic fundraising audit.
2. Synthesise and analyse audit data in order to abstract meaning.
3. Critically evaluate the fit between an organisation and its environment.
4. Conduct and interpret detailed SWOT analysis.
5. Critically evaluate a range of strategic fundraising options.
6. Develop and supervise the implementation of a strategic fundraising plan or campaign.
7. Evaluate fundraising activity by strategically employing a range of fundraising metrics.
8. Make a case for investment in fundraising, employing a range of modeling techniques or procedures.
9. Critically assess, control, balance and communicate fundraising risk.
10. Design, implement and interpret a range of strategic fundraising controls.
11. Manage expectations and encourage involvement of senior leadership regarding fundraising performance.

## MODULE 4: DEVELOPING A PHILANTHROPIC SOCIETY

The final module continues the theme of the wider role that fundraisers play in the development of a more generous society. Despite all the developments in our profession these past forty years and the development of a plethora of new digital communication channels, payment methods, etc. giving as a percentage of GDP has been stubbornly static since records began and there is some evidence that participation in giving is actually falling. The purpose of this module is to reflect on what might be done to change this and to develop philanthropy in your home country.

It begins by studying the nature of what it means to be a profession and whether, indeed, fundraising meets the criteria. It also looks at the relationship between fundraising and philanthropy as articulated by Bob Payton, Hank Rosso and others. This is developed into a detailed examination of ethics, public trust and confidence, the distinction between the terms and how they operate at both a sector and an organisational level. We will also consider why they are important and their role in developing philanthropy and look at our fundamental approach to fundraising and how this impacts our donors.

We introduce a number of ideas from the domain of philanthropic psychology and encourage you to reflect on how their professional practice could be modified to add more value for donors. The course then moves on to consider the potential to grow philanthropy by developing new audiences, channels and modes of giving, reviewing the latest trends and assessing any extant research in relation to each. The module concludes by examining the relationship of the sector with government and sector 'umbrella' bodies and what might be done to achieve a favourable policy environment to further stimulate giving.

### ADVANCED FUNDRAISING KNOWLEDGE

#### Philanthropy

Definitions, role of philanthropy in society, philanthropic traditions, (individual, organisational, social, cultural and historical) determinants of philanthropy.

#### The profession of fundraising

Requirements for a profession, current developments within the profession, role of sector bodies, roles and responsibilities of the professional fundraiser and the role that volunteers play as key components of the professional team. The transition of professional education from skill-based, to knowledge-based, to competence based.

#### Philanthropic psychology

Difference between short and long term approaches. Need to grow giving by developing value returned to donors (e.g. warm glow and ego enhancement) and how their support is key to the success of organisations. Actions that develop philanthropy by reinforcing a donor's sense of self, versus actions that detract from it. Utility of different psychological theories of giving through different vehicles (social influence, persuasion, identity, morality, ethics and empowerment).

#### Promoting public trust and confidence

Definition, distinction between the two terms, determinants of trust in the sector, determinants of trust in a nonprofit organisation, measures to build trust and confidence, importance of transparency / representing fundraising to the wider public. Sector initiatives: current sector initiatives and learning from overseas, e.g. charityfacts.org, the work of the ImpACT Coalition, codes of fundraising practice and regimes of self-regulation.

### Fundraising ethics

Ethical frameworks, codes of conduct, ethical and values based decision making, ethical policies and processes for their development.

### Corporate Social Responsibility (CSR)

Definitions, models of CSR, applicability of CSR to the nonprofit sector, stakeholder analysis, the impact of fundraising on stakeholders and wider society, importance of achieving a societal orientation. Development of a personal philanthropic philosophy as a way of relating to individual stakeholders and achieving a societally oriented organisational culture.

### Broadening participation in giving

Current trends and issues in relation to each major form of giving (individual, corporate and foundation), participation in giving, profile of different categories of supporter and potential audiences under-represented in giving. New forms of giving, new fundraising markets/ audiences. How different generations differ in their approach to the charitable sector. The social role of the sector in developing a culture of philanthropy, role of government and other agencies in developing giving. Current initiatives to foster giving. Lessons from other countries, giving in other countries, traditions and cultures.

### Transformational philanthropy

Strategic optimisation of philanthropy's transformative function for individuals, groups, organisations and societies. Transformation of individual fundraisers to a team of highly motivated donor-centred professionals who understand how to design donor care programs that enrich the lives of their donors. Transformation of organisational culture and structure. Transformation of a society by clearly articulating how an organisation's case for support is in alignment with societal needs.

### Government policy and influence

Responsibilities of relevant government departments their policies, and their application. Role of taxation, regulation of fundraising practice, regulation of professional fundraisers.

## ADVANCED FUNDRAISING SKILLS

By the end of this module you should be able to:

1. Identify, formulate and establish criteria in order to creatively develop individual, corporate and trust/ foundation philanthropy.
2. Critically reflect on the requirements of a profession and the current status of fundraising and professional development for fundraisers.
3. Contribute to the development of public trust in the nonprofit/charity sectors.
4. Develop trust in your own organisation through their personal approach to fundraising management and reporting.
5. Contribute to the development of public confidence in the sector through participation in a range of sector initiatives.
6. Critically evaluate the potential of new fundraising audiences, channels and modes of giving.
7. Suggest strategies to attract and retain new fundraising audiences/ markets.
8. Understand the transformational role that philanthropy can play for individuals, groups, organisations and societies and the implications for their own fundraising strategy and approach to fundraising management.
9. Critically evaluate the current role of sector bodies in stimulating giving.
10. Critically evaluate government policy in relation to growing philanthropy in their respective country.
11. Articulate the roles that you might play personally in helping develop philanthropy in their respective country.

## ADVANCED LEVEL TRANSFERABLE SKILLS

Fundraising knowledge and understanding aside, the International Advanced Diploma in Fundraising aims to help you develop a range of higher level thinking skills and competencies. Our pre-class assignments have been specifically designed with these in mind.

On completion of the International Advanced Diploma in Fundraising you should be able to:

1. Think critically and be creative: manage the creative process in self, others and teams; organise thoughts, analyse, synthesise and critically appraise. This includes the capability to identify assumptions, evaluate statements in terms of evidence, detect false logic or reasoning, identify implicit values, define terms adequately and generalise appropriately.
2. Solve complex problems and make decisions: establish criteria using appropriate decision making techniques including identify, formulating and solving fundraising problems; and create, identify and evaluate options; implement and review decisions.
3. Use information and knowledge effectively: scanning and organising information; synthesising and analysing in order to abstract meaning from information and to communicate knowledge.
4. Communicate effectively: listening, oral and written communication of complex ideas and arguments using a range of media including the preparation of business reports.
5. Demonstrate high personal effectiveness: critical self-awareness, self-reflection and self-management; time management; sensitivity to diversity in people and different situations and the ability to continue to learn through reflection on practice and experience.
6. Recognise and utilise individual contributions in team processes and to negotiate and persuade or influence others.
7. Recognise and address ethical dilemmas, applying ethical and organisational values to situations and choices.

# COURSE ASSESSMENT AND EVALUATION

The assessment regime for the International Advanced Diploma in Fundraising consists of seven assignments. These are outlined below.

**ASSIGNMENT 1:** Review your most challenging managerial problem in order to create fundraising success in your organisation (1500 words):

You are required to:

1. Identify the most challenging managerial problem you feel you face in order to create fundraising success in your organisation and briefly explain your current approach to dealing with this problem. (150 words)
2. Analyse this problem with appropriate course models or frameworks (i.e. Checkland, 2000; 2005; Andreasen and Kotler, 2008 - Chapter 2 and 4; Nardon and Steers, 2011; Mintzberg, 2011 and Quinn 2011). For each theory you should say why it is, or is not relevant and if it is, how. (500 words) Identify and/or create a potential new solution to this problem, i.e. new opportunities for change. (150 words)
3. Critically evaluate the potential effectiveness and efficiency of this new solution using the relevant course models and frameworks you identified earlier (e.g. Kotter and Cohen, 2011; and Kotter and Schlesinger, 2008). (500 words)
4. Critically appraise whether your change plans/ strategies will create positive organisational level change according to Schein (2011). If so, how? And if not, why not? (200 words)
5. Critically appraise whether your change plans/ strategies will create positive organisational level change according to Schein (2011). If so, how? And if not, why not? (200 words)

To achieve a good grade in this assignment you should demonstrate a sound synthesis of the complexity of your organisation and properly position your own role in it. Good assignments will also make it clear how the identified problem is the most challenging and why its successful resolution will have a key impact on the organisation. All the sources of information you employ will be appropriately referenced.

Your description of the most challenging management problem and its current solution should provide sufficient detail such that course-content informed analysis can be effectively and efficiently conducted.

Your critical evaluation of the new solution should properly acknowledge its strengths and weaknesses and its impact on your role, relevant teams and the organisation as a whole. You should make sure that you address how this solution might impact on the organisational culture.

The length of this assignment will clearly vary by the breadth of management activity analysed and the manner in which you choose to summarise your information.

**Guidelines for word counts however should be followed whenever possible. It is the precision and depth of your writing that counts in this assignment, not the length of your writing.**

The grade for this assignment will be calculated as follows:

Criteria	% of Grade
Description of the most challenging management problem and its current solution	5%
Analysis of the problem	30%
Identification and creation of a potential new solution	10%
Critical evaluation of the new solution	25%
Critical appraisal of potential impact on organisational culture	20%
Presentation	10%
<b>TOTAL</b>	<b>100%</b>

**ASSIGNMENT 2: Working with the Board (1100 words):**

You are required to apply the four tools for design thinking (Liedtka and Ogilvie, 2010) in this assignment. Although you are not required to reproduce how you used these tools, your description of the conflict and each of your answers to the questions below will show us the depth of your understanding in applying these four tools. Specifically, you are required to:

1. Identify the most difficult conflict you feel you face in order to create fundraising success in your organisation and briefly explain the degree to which your board could be involved in dealing with this problem. (150 words)
2. Analyse your board composition and any roles they could play in relation to this most difficult conflict. (Pfeffer and Sutton, 2011). (150 words)
3. Critically analyse the focal conflict within the power structure of all relevant stakeholders and indicate any power board members could have in helping you resolve it (Robbins and Judge, Chapter 13). (150 words)

You are then required to use the following papers to improve the quality of your analysis using the four tools you've read about in design thinking. Specifically, you are required to:

4. Critically evaluate how Pierce and Jussila's (2010) theory on collective psychological ownership could help you improve the value chain analysis you conducted of your most difficult conflict. (150 words)
5. Critically evaluate how Hernandez (2012)'s theory on the psychology of stewardship could help you improve the mind mapping you conducted of your most difficult conflict. (150 words)
6. Critically evaluate how Heskett, Sasser and Wheeler (2008)'s article may suggest creative ways to involve the board in creating an organisation's ownership culture and impact on your mind mapping; (150 words)
7. Critically evaluate how involving the board might backfire as a result of the learning anxiety (Coutu, 2002) of some Board members and how you might be able to overcome this (Heifetz and Linsky, 2002). (200 words)

The grade for this assignment will be calculated as follows:

Criteria	% of Grade
Identification of the most difficult conflict and brief explanation of current board involvement in this conflict	<b>10%</b>
Analysis of the board composition and any potential roles the board members could play	<b>15%</b>
Analysis of the power structure involved in the conflict and potential power possessed by the board	<b>15%</b>
Critical evaluation and application of Theory on Collective Psychological Ownership	<b>10%</b>
Critical evaluation and application of The Psychology of Stewardship	<b>10%</b>
Critical evaluation and application of Heskett, Sasser and Wheeler (2008)	<b>10%</b>
Critical evaluation and application of Coutu (2002)	<b>10%</b>
Critical evaluation and application of Ronald and Marty (2002)	<b>10%</b>
Presentation	<b>10%</b>
<b>TOTAL</b>	<b>100%</b>

To achieve a good grade in this assignment you should demonstrate a sound synthesis of the complexity of existing conflicts within your organisation and properly position your own role within them. Good assignments will also make it clear why the identified conflict is the most difficult one to resolve and why its successful resolution is important. All the sources of information you employ will be appropriately referenced.

Your description of the most difficult conflict should provide sufficient detail for a course-content informed analysis to be effectively and efficiently conducted. In particular, you will want to properly identify any potential involvement of the board in this conflict and any characteristics of the power structure that might have contributed to this conflict.

Your critical evaluation and application of course readings should be based on your correct understanding of them, your proper application of this understanding in the analysis of your own organisation, and any creative solutions that might have been suggested by these analyses. You need to concisely and precisely explain the logical steps that you take in the application of course-content in your analysis.

The length of this assignment will clearly vary by the breadth of management activity analysed and the manner in which you choose to summarise your information. **Guidelines for word counts however should be followed whenever possible. It is the precision, depth and creativity of your writing that counts in this assignment, not the length of your writing.**

**ASSIGNMENT 3:** Supporter stewardship and loyalty (2500 words):

You are required to apply the four tools for design thinking (Liedtka and Ogilvie, 2010) in this assignment. Although you are not required to reproduce how you used these tools, your review of your organisation’s current performance in respect of supporter retention will demonstrate the depth of your understanding in applying these four tools. Specifically you are required to:

1. Identify a distinct segment of supporters on which this assignment will focus and critically evaluate why the selection of this segment of supporters is important in creating fundraising success. (200 words)
2. Critically evaluate your organisation’s current approach to securing loyalty from this segment and outline the pattern of performance achieved. (500 words)
3. Apply relevant course ideas, theories and concepts to identify and prioritise possible ways in which the loyalty of this segment could be improved. (1000 words)
4. Identify and prioritise the barriers you will encounter in making the changes you propose a reality? You must justify your prioritisation. (300 words)
5. Specify how you propose to overcome the most critical barrier using Kotter and Schlesinger (2008) to justify your selection of change strategy and Kotter and Cohen (2011) to design the steps that you will take. (500 words)

A good assignment will synthesise the latest academic research and industry best practice and leverage that knowledge to identify both an appropriate focal segment and strengths and weaknesses in the current approach to stewardship. A good assignment will clearly reference the source of each idea and relate that idea well to the depicted scenario.

A wide range of course ideas and models will be used in suggesting how loyalty could be fostered and the prioritisation of the most likely barriers should be similarly based on theory and your understanding of the quality of evidence provided.

Your approach to overcoming the most critical barrier should be based on a correct understanding of the required readings. A good assignment will do more than simply apply any frameworks or ideas, however, it will demonstrate a detailed understanding of the underlying principles or rationale.

The grade for this assignment will be calculated as follows:

Criteria	% of Grade
Identification and justification of appropriate focal segment	<b>10%</b>
Critical evaluation of current approach to securing supporter loyalty from focal segment	<b>20%</b>
Identification and prioritisation of potential solutions	<b>20%</b>
Identification and prioritisation of possible barriers to implementation	<b>20%</b>
Identification and justification of possible solutions to overcoming the critical barrier	<b>20%</b>
Presentation	<b>10%</b>
<b>TOTAL</b>	<b>100%</b>

**ASSIGNMENT 4:** Intergrated marketing communications (2000 words):

You are again required to apply the four tools for design thinking (Liedtka and Ogilvie, 2010) in this assignment. Although you are not required to reproduce how you used these tools, your answers should reflect a level of thinking that can only occur with the meaningful application of these four tools.

1. You are required to identify one key relationship that you have with another marketing department or team (e.g. campaigning or service provision marketing). In the context of that relationship what actions might that team take to assist you in achieving fundraising goals and what actions might you (and your team) take to better assist them in achieving theirs? (800 words)
2. You should then identify what you see as the most critical barrier that would need to be overcome for that level of collaboration and integration to take place. You must make the case for focusing on this issue using course ideas and/or frameworks. (400 words)
3. You should then identify, create and evaluate alternative solutions (that you don't presently adopt) that might overcome this barrier. You should also evaluate whether these solutions are superior to what you do now. (800 words)

To achieve a good grade in this assignment you should demonstrate a sound synthesis of the complexity of existing collaborative opportunities within your organisation and properly position your own role in them. Good assignments will also make it clear why the identified opportunity is most crucial to seize and why this success will impact positively on the organisation. All the sources of information you employ will be appropriately referenced.

Your description of the most important opportunity should provide sufficient detail such that a course-content informed analysis can be effectively and efficiently conducted. In particular, you will want to properly identify the potential barriers all relevant stakeholder groups might face.

Your critical evaluation of alternative solutions should be properly positioned in these potential barriers. This critical evaluation should also demonstrate correct

understanding of all relevant course-content, a proper application of this understanding in the analysis of this opportunity, and any creative actions that might have been suggested by these analyses. You need to concisely and precisely explain the logical steps that you take in the application of course-content in your analysis.

The length of this assignment will clearly vary by the breadth of management activity analysed and the manner in which you choose to present your arguments. **Guidelines for word counts however should be followed whenever possible. It is the precision, depth and creativity of your writing that counts in this assignment, not the length of your writing.**

The grade for this assignment will be calculated as follows:

Criteria	% of Grade
Identification of opportunities to enhance integration	<b>25%</b>
Identification and justification of most critical barrier	<b>25%</b>
Critical evaluation of alternative solutions	<b>40%</b>
Presentation	<b>10%</b>
<b>TOTAL</b>	<b>100%</b>

**ASSIGNMENT 5: Strategic fundraising audit (max 5000 words):**

You are again required to apply the four tools for design thinking (Liedtka and Ogilvie, 2010) in the audit. Although you are not required to reproduce how you used these tools, your audit will demonstrate the depth of your understanding in applying these four tools.

1. You are required to develop a strategic fundraising audit for your organisation. Your audit should include:

- a) External Analysis (Macro-environmental Analysis, Competitor Analysis, Market Analysis)
- b) Internal Analysis (including Performance Analysis and Determinants of Strategic Options)

Since you have used the four tools for design thinking to help you conduct your external and internal analysis, you should now be able to continue using the fifth tool for design thinking:

- c) Rapid Concept Development (Liedtka and Ogilvie, 2010)

During this process, you should generate at least one potential new fundraising opportunity that has not been recognised by your fundraising team before. Typically, you will generate more than one as a consequence of this analysis.

- d) SWOT Analysis

In the light of your audit and your rapid concept development exercise, you should identify and prioritise the key opportunities that are open to you to achieve growth your voluntary income.

2. In a separate document you must then make a case for investment in the most promising of these alternatives to your Board.

To achieve a good grade in this assignment you should demonstrate a sound knowledge of a wide range of sources of sector information and conduct a comprehensive analysis in each component of your audit. Good assignments will also make it clear how each of the factors identified will be likely to impact on the organisation and all the sources of information you employ will be appropriately referenced.

Your case for investment should include a detailed budget and investment appraisal using course techniques and concepts. It should also use other design tools that assist in making the case (e.g. storytelling).

The length of this assignment will clearly vary by the breadth of fundraising activity analysed in the audit and the manner in which you choose to summarise your information. **Task 1 will probably be of the order of 3000 words. Task 2 should be no longer than 2000 words (plus tables).**

The grade for this assignment will be calculated as follows:

Criteria	% of Grade
External Analysis	15%
Internal Analysis	15%
Rapid Concept Development	10%
SWOT and critical evaluation of strategic alternatives	20%
Case for Investment to the Board	30%
Presentation	10%
<b>TOTAL</b>	<b>100%</b>

**ASSIGNMENT 6:** Critical reflection on new opportunity (2000 words):

In this assignment you are expected to utilise a number of the remaining design tools to assist you in the development of a plan to seize the opportunity you identified in Assignment 5. Specifically, you are required to:

1. Explain how you might use the prototyping and customer co-creation tools to help you test some of your underlying assumptions about this opportunity. Please be as specific as possible in your answer. (500 words)
2. Provide a brief synthesis of any available academic and/or practitioner research which in your opinion might offer insight into how best to design and implement this new form of fundraising (or fundraising approach). (1000 words)
3. In the light of your answers to (1) and (2) critically evaluate how elements of a 'learning launch' could be built into your fundraising plan for this new form of fundraising or fundraising approach. What would you test, why would you test it and how would you test it? (500 words)

To achieve a good grade in this assignment you should demonstrate correct understanding of all relevant course-content, your proper application of this understanding in the analysis of this opportunity, and any creative actions that might have been suggested by these analyses. You need to concisely and precisely explain the logical steps that you have taken in the application of course-content in your analysis.

Different from previous assignments, where you were required to synthesise real world information, this assignment requires that you demonstrate the ability to successfully synthesise available academic research. Your synthesis of the academic literature should begin with a sufficient yet concise description of what you utilised. A sound synthesis of the academic literature however goes beyond a simple and correct understanding of isolated readings, it requires that you demonstrate the ability to examine the same real-world situation through multiple theoretical lenses and in light of multiple (and sometimes

contradictory) pieces of empirical evidence. It is through the comparison and contrasts of these perspectives that you may gain otherwise impossible insights into how to seize an important real world opportunity. Your critical evaluation of the learning launch should be properly positioned in the perspectives that you synthesised. You need to concisely and precisely explain the logical steps that you took in the application of course-content in this analysis.

The length of this assignment will clearly vary by the breadth of management activity analysed and the manner in which you choose to present your arguments. **Guidelines for word counts however should be followed whenever possible. It is the precision, depth and creativity of your writing that counts in this assignment, not the length of your writing.**

The grade for this assignment will be calculated as follows:

Criteria	% of Grade
Analysis of prototyping and customer co-creation tools	25%
Synthesis of available research	25%
Critical evaluation of options for learning launch	40%
Presentation	10%
<b>TOTAL</b>	<b>100%</b>

**ASSIGNMENT 7: Stewarding the public trust (2600 words):**

In this final assignment you are required to conduct an analysis of opportunities within your own professional practice to develop public trust within the wider nonprofit sector. You should utilise the thinking model introduced during this course to help you generate, prioritise and implement potential solutions. Specifically you are required to:

1. Critically evaluate your organisation’s current approach to fundraising and identify areas where your contribution to developing public trust in the sector is weak or could potentially be having a harmful effect. (800 words)
2. Prioritise changes in strategy that according to relevant theory might bolster the public trust. (800 words)
3. Identify any issues that might need to be addressed within the organisation to implement your proposed changes and suggest how these difficulties might be overcome. (1000 words)

To achieve a good grade in this assignment you should demonstrate a sound synthesis of the complexity of your organisation and properly position your own role in it. Your critical evaluation of the current approach should begin with a sufficient yet concise description of the current approach, and your critically evaluation should demonstrate a sound and holistic mastery of all relevant course content.

Your identification and prioritisation of potential solutions should be equally grounded in a sound synthesis of the real world and the academic literature. It should properly acknowledge strengths and weaknesses from all relevant perspectives.

A good assignment will also make it clear why the identified change management issues are the most important and why their successful resolution will be likely to impact positively on the organisation. All the sources of information you employ will be appropriately referenced.

The length of this assignment will clearly vary by the breadth of management activity analysed and the manner in which you choose to present your arguments. **Guidelines for word counts however should be followed whenever possible. It is the precision, depth and creativity of your writing that counts in this assignment, not the length of your writing.**

The grade for this assignment will be calculated as follows:

Criteria	% of Grade
Critical Evaluation of Current Approach	<b>25%</b>
Identification and Prioritisation of Potential Solutions	<b>25%</b>
Identification of Change Management Issues and Potential Solutions	<b>40%</b>
Presentation	<b>10%</b>
<b>TOTAL</b>	<b>100%</b>

## CALCULATION OF COURSE GRADES FOR EACH TEACHING BLOCK

To achieve the International Advanced Diploma in Fundraising it is necessary to pass the assessment for each teaching block.

**For Block 1 your grade will be calculated as follows:**

Assessment	% of Grade
Assignment 1	20%
Assignment 2	20%
Assignment 3	20%
Assignment 4	40%
<b>TOTAL</b>	<b>100%</b>

Those candidates achieving a score of 49% or less in an assignment would be deemed to have failed that assignment. If an assignment is failed, a further three months will be allowed for resubmission. Further extensions of time will be considered on a case by case basis by the Institute of Fundraising or the Association for Fundraising Professionals (further details on page 41). Candidates are permitted two attempts at completing each assignment, although in the case of a resubmission the score would be capped at 50%.

Those candidates achieving 50% or more in an assignment will be deemed to have passed.

**For Block 2 your grade will be calculated as follows:**

Assessment	% of Grade
Assignment 5	30%
Assignment 6	30%
Assignment 7	40%
<b>TOTAL</b>	<b>100%</b>

## CALCULATION OF FINAL GRADES FOR THE ADVANCED DIPLOMA

Your overall grade for the International Advanced Diploma in Fundraising will be an average of your grade for the two blocks.

Those candidates failing one or more blocks will be deemed to have failed the International Advanced Diploma in Fundraising.

Those candidates achieving an average score of between 50% and 59% will be deemed to have passed the International Advanced Diploma in Fundraising.

Those candidates achieving an average score of between 60% and 69% will be deemed to have passed the International Advanced Diploma in Fundraising with Merit.

Those candidates achieving a score of 70% or more will be deemed to have passed the International Advanced Diploma in Fundraising with Distinction.

Upon completion of the requirements an official certificate for the International Advanced Diploma in Fundraising will be awarded to you at the annual graduation ceremony held by the Association for Fundraising Professionals and the Institute of Fundraising. You will also be entitled to use the post-nominal MInstF(AdvDip).

## STUDENT APPEALS

The Association for Fundraising Professionals and the Institute of Fundraising (IoF) is committed to providing an accessible and fair assessment process for all candidates undertaking their qualifications. If you feel you have cause to appeal an assessment decision please follow the guidelines below.

### APPEALS PROCEDURE

Step One: Refer to the Course Handbook

In the first instance, you should refer to the course handbook which highlights how your assignment was marked. However if you still have further questions on your assignment, follow the relevant step(s) below.

Step Two: Course participants have the right to appeal against any or all grades awarded. This must be made in writing via email no more than 14 days after the receipt of the grade (unless there are extenuating circumstances). Appeals must be lodged with a member of the academy team.

In the UK, please email [academy@institute-of-fundraising.org.uk](mailto:academy@institute-of-fundraising.org.uk)

In the US, please email [diploma@afpnet.org](mailto:diploma@afpnet.org)

Step Three: Appeals will be heard by a panel of three comprising:

- A senior representative of the Professional Development team
- The senior examiner
- The external examiner

The decision of that group will be final.

Individuals who have failed the program can retake in its entirety and full fees will be payable.

# ACADEMIC MISCONDUCT

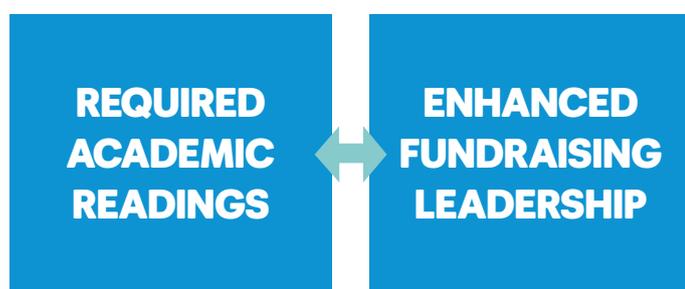
Students are responsible for upholding and maintaining academic and professional honesty and integrity. All course faculty have the responsibility of fostering the intellectual honesty as well as the intellectual development of students and part of this responsibility means that faculty must investigate cases of potential academic misconduct promptly and thoroughly. The course team take their responsibilities seriously and do not tolerate cheating, plagiarism, or any other form of academic misconduct. Participants found guilty of plagiarism or cheating will be subject to sanction, including the lowering of a grade or removal from the programme.

Prohibited activities and actions include the following:

1. Cheating. A student must not use or attempt to use unauthorised assistance, materials, information, or study aids in any academic exercise, including, but not limited to, the following:
  - A) A student must not use external assistance on any “in-class” or “take-home” assessment, unless the tutor has specifically authorised this assistance.
  - B) A student must not use another person as a substitute in the taking of an examination or other form of assessment.
  - C) A student must not allow others to conduct research or to prepare work for him or her without advance authorisation from a member of the course team.
  - D) A student must not collaborate with other persons on a particular assignment and represent that work as wholly their own work.
2. Plagiarism. A student must not adopt or reproduce ideas, words, or statements of another person without appropriate acknowledgment. A student must give credit to the originality of others and acknowledge the source whenever he or she does any of the following:
  - A) Quotes another person’s actual words, either oral or written;
  - B) Paraphrases another person’s words, either oral or written;
  - C) Uses another person’s idea, opinion, or theory.

# YOUR ROADMAP TO SUCCESS IN IDAF

Your tutors view their role in this programme as your companion and guide. They view your learning as a journey in which you travel between two destinations back and forth: the knowledge and understanding from the academy (i.e. required academic readings) and your daily practice in fundraising leadership. Hopefully, through this travel your fundraising leadership will be enhanced (i.e. enhanced fundraising leadership)!



In the language of building general thinking skills, it is through the synthesis of the academic knowledge and your daily experience that we hope to enhance your fundraising leadership. Synthesis is represented as the solid line connecting the two destinations.

On a daily basis, we hope that you will travel between these two destinations every time you read a theory from the course, and every time you take a leadership decision in your job. So if you read a couple articles a day or make a couple decisions a day, we would expect that you would be traveling between the two destinations a few times a day! Yes, it might sound tedious for now, but once you get used to it, it can be quite fun!

If we now think about the two destinations as the entire body of work that you need to read for this course and the overall enhancement in your fundraising leadership by the time you complete the program, then you can think about all the course activities that we designed for you as rest stops and milestones that you can use to travel from the entire set of required academic readings to your enhanced level of fundraising leadership.

In addition to all the activities that we plan to do with you, you are welcome to email, skype or ring your tutors for additional support. These additional supports are optional. More information is provided below on each learning activity.

## 1) Required academic readings

These readings are represented as your starting destination in the two figures.

Most of the readings will be provided on the online learning platform and are included in the course fees. Students are however required to purchase the below essential readings individually as they have not been included in the course fees:

Sargeant A and Shang J (2010) *Fundraising: Principles and Practice*, Jossey Bass, San Francisco.

Osland J and Turner M (2010) *Organizational Behaviour Reader*, Prentice Hall, Boston.

## 2) Preparation tasks

Compulsory preparation tasks are provided for you to release the boredom of academic readings and to deepen your understanding of them. You may view preparatory tasks as the road we build for you to connect your readings to your enhanced fundraising leadership. Within the context of this course, successful completion of these tasks allow you to achieve the highest marks possible on your seven major assignments.

All preparatory tasks will be submitted by 23:59 on Sundays from your own time zone. Of course, if you choose to submit them on any other days prior, you should feel free to do so. This programme is built to accommodate your schedule as flexibly as possible.

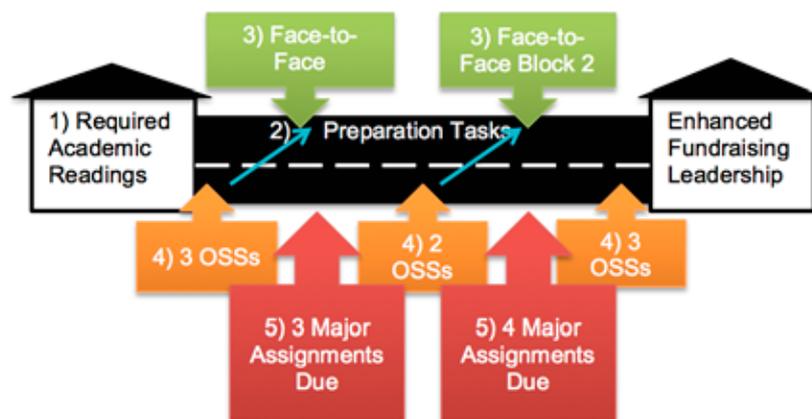
All preparatory tasks are downloadable from your online learning platform. All submissions are also completed online.

## 3) Face-to-face Block 1 & 2

Face-to-face blocks and Online Synchronised Sessions (OSS) are resting stations that we build along the way to help you synthesise your learning, receive support and socially connect with your peers and tutors.

## 4) Online Synchronised Sessions (OSS)

Online group discussions will be held by your tutors throughout the programme. We call them Online Synchronised Sessions (OSS). Your completed and submitted preparatory tasks will be reviewed by your tutors team during these sessions.



You may view these OSSs as the resting stations tutors built for you as you walk on the road from “your required academic readings” to your “enhanced fundraising leadership”. Within the context of this course, successful participation and reflection on your preparatory tasks during these OSSs allow you to achieve the highest marks possible on your seven major assignments.

All OSSs will be arranged on Tuesdays. The exact time will differ by your time zone and by cohort. But in general, we book it for 12:00pm-1:00pm Eastern Standard or Summer Time in the United States for AFP cohorts or 12:00pm-1:00pm London time in the United Kingdom for IoF cohorts. During the weeks leading up to the first face-to-face teaching block, there will be 3 OSSs. During the weeks between the first and the second face-to-face teaching block, there will be two OSSs. During the weeks after the second face-to-face teaching block, there will be four OSSs. Please find the exact date and time in your course timetable.

You will participate in these sessions through your online learning platform. All OSSs will be taped and made available to you through the online learning platform in case you miss a session. Post 3-4) Online Posting Board (OPB)

Online Posting Boards are not represented in road map. After OSS sessions 2, 3, 4, and 5, we ask you to post online the three most difficult concepts or theories that you still don't understand after completing preparatory tasks and after participating in OSSs. The tutor team will design Face-to-Face blocks based on your postings.

All OPBs will be submitted by 23:59 on the Sundays following their corresponding OSS sessions from your own time zone. You will do so in your online learning platform. Of course, if you choose to submit them on any other days, you are welcome to. This programme is built to accommodate your schedule as flexibly as possible.

#### 5) Seven major assignments

The seven major compulsory assignments you are required to complete in IADF are proxies of how much your fundraising leadership is enhanced through your learning. Achieving distinction in these assignments, we hope, will serve as a powerful predictor for your future success in leading fundraising transformations in your organisations.

Submission deadline for all your major assignments are provided in your timetable. All due dates have deadlines of 23:59 from your own time zone. All submissions are done also online. Of course, if you choose to submit them on any other days prior, you are welcome to do so. This programme is built to accommodate your schedule as flexibly as possible.

# FURTHER GUIDANCE

## TIMETABLE

The best way to see your learning journey from a birds eye view is through your course timetable. They are downloadable from your online learning platform. The busiest time will be between the two teaching blocks when you will be required to submit the first three major assignments and the preparatory tasks, in addition to participating in OSSs and online posting. Please ensure you have planned enough time for your studies between the two teaching blocks.

## Online Learning Environment

Please familiarise yourself with the online learning platform in order to attend these sessions. Learning platforms may be different depending on the cohorts that you are in. So instructions on learning platforms will be provided to each cohort after the course begins.

## How to Submit Assignments

Please always refer to the guidelines about the online learning platform for your cohort to make sure you do not get penalised for submitting an assignment in the wrong format.

If for any reason these instructions are not followed your assignment will be returned to you for correction and will be treated as a late submission. The penalties below will apply.

## Penalties for Late Submission of Assignments

When an assignment is handed in late without prior permission or where no formal extension has been granted the piece of work will receive a deduction of 5% from the mark awarded for everyday that the work is late, including Holidays and weekends.

## Deadline Extensions for Assignments

Do not postpone starting work on your assignment, because it is important to meet the submission deadlines. Extensions will only be granted under exceptional circumstances such as an illness. Illness must be supported by a doctor's medical note. If you are encountering problems in managing your workload make use of the IoF's 'How to' guides to improve your time management skills included as part of the course resources.

## Guidelines for Assignment Extensions

Candidates who wish to apply for an extension, on medical or compassionate grounds, must first fill in an assignment extension request form, available under the general resources section in your learning platform.

The non-submission of an assignment will mean that a candidate has failed to complete the requirements of a unit and may therefore not be permitted to proceed with the next assignment.

- Extensions will NOT be granted if the reason is pressure of work.
- Requests should be made in as far advance of the deadline as possible.
- Extension requests will not be granted retrospectively.

If you believe that you will need an extension and have good cause to apply, please follow this procedure:

Complete the 'Assignment Extension Request Form' obtained from your online learning platform.

Submit the completed assignment extension request form to the tutors together with a medical certificate or other appropriate supporting documentation. The tutors will give you a prompt decision on any application for extension by email and your record will be updated accordingly by professional associations through which you registered.

## COMPLAINTS

A complaint is defined as: “an expression of dissatisfaction either about the qualification courses, facilities or services provided by the International Advanced Diploma Program or about actions or lack of actions by the Association for Fundraising Professionals, Institute of Fundraising or its staff”. This guide details the steps you should follow if you feel you have a complaint. This procedure does not cover appeals against academic assessment, for which separate procedures exist.

### STEP ONE: MAKE AN INFORMAL COMPLAINT

If there are reasonable grounds to make a complaint, the first step is to make an informal complaint. The Association for Fundraising Professional and the Institute of Fundraising believe that, if possible, complaints should be resolved through informal discussions. Our experience is that the vast majority of complaints are resolved at this stage.

For UK participants, complaints should be addressed to the Head of Professional Development and emailed to: [academy@institute-of-fundraising.org.uk](mailto:academy@institute-of-fundraising.org.uk).

For US participants, complaints should be addressed to the Center for Fundraising Innovation at the Association of Fundraising Professionals and emailed to: [diploma@afpnet.org](mailto:diploma@afpnet.org).

In addition to describing the nature of your complaint you should also inform us of your desired outcome. Complaints should not be made in online discussions or other public forums. You should not proceed to the next step unless you have been unable to resolve the complaint informally.

### STEP TWO: SUBMIT A FORMAL WRITTEN COMPLAINT TO INSTITUTE OF FUNDRAISING OR ASSOCIATION OF FUNDRAISING PROFESSIONALS

If you cannot resolve your complaint informally you should request a ‘Complaints Form’ and send the completed form by email to:

[academy@institute-of-fundraising.org.uk](mailto:academy@institute-of-fundraising.org.uk) (if you are participating in the UK cohort)

or

[diploma@afpnet.org](mailto:diploma@afpnet.org) (if you are participating in the US cohort).

We ask you to use this form to ensure you provide all information required to carefully review your complaint. In the form you will be asked to describe what attempts you have made to resolve the complaint informally; if you do not appear to have made a satisfactory attempt to do this you will be asked to do so before the complaint progresses to the formal stage. You will receive confirmation that the complaint has been received. At this point the IoF Academy or AFP Education and Training team may contact you for further information. Academic complaints (e.g. complaints regarding course content) will be assigned to an appropriate academic staff member for resolution. Service complaints (e.g. complaints regarding communications) will be assigned to the relevant senior member of the Academy team at IoF or Education and Training team at AFP.

The assigned member of staff will then contact you and endeavour to resolve your complaint.

## FREQUENTLY ASKED QUESTIONS

### Q: Do I need to do anything before my course starts?

Yes, it is essential you have identified from the outset that you are ready for the program. The IADF assumes that you have either gained the Diploma in Fundraising (or equivalent) or have a similar baseline of fundraising knowledge.

To help you assess whether you are ready for the course we have produced a Knowledge Audit that will help you, test all the relevant aspects of your knowledge and properly prepare for the Advanced Diploma.

If you need to complete the Knowledge Audit (and assuming once you have done so you feel you are ready to proceed) or your initial application has been accepted based upon your previous qualifications and experience as highlighted on your CV, you will need to be formally enrolled on to the course by the Academy team at IoF or the Education and Training team at AFP.

You will need to allow around 5-6 weeks to complete the preparation for teaching block one. Please see further details in the timetable.

You will receive an invitation from our e-learning platform which you will be using to access all the required materials and support for your course. Please accept this invitation.

### Q: What is expected of me?

To ensure you are not placed at a disadvantage when studying for your IADF qualification you should have a good command of written and spoken English to complete assignments to the required standard.

If you are in doubt about the standard of your spoken and written English please let us know before you begin your course. As a guide, you will need to have an International English Language Testing Service (IELTS) level 6.0 score or, Test of English as a Foreign Language (TOEFL) score of 550 or equivalent.

### Q: Who are my tutors?

Your tutor's details are included in the first section of this handbook; you will receive a personally addressed welcome email from them before the course begins.

### Q: How long will the course take to complete?

The length of time of completion of Advanced Diploma in Fundraising qualification is one full academic year, approximately twelve months.

### Q: How much time do I need to allow for my studies?

You will need to allow around 5-6 weeks to complete the preparation for teaching block one.

This course is designed to be a "student-led" educational experience and thus you are expected to take responsibility for your own learning, investing a great deal of time and effort in preparing for every session. You will probably find that you will need to spend about two hours preparing for each hour of classroom contact – and you will need a further two hours per hour of classroom contact to work on your course assignments when each teaching block ends.

As an example, in order to prepare for the first three-day block of the Advanced Diploma (i.e. 24 hours of teaching) it will be necessary for you to allocate around 48 hours of study time to prepare. This preparation is critical for success because your faculty will analyse the preparation you submit and design their sessions around what your peers have understood, and what they haven't about the focus of the sessions. The faculty will also draw on the examples supplied by students to help them orient the material towards the circumstances you and your colleagues are actually facing. This approach is known as 'Just in Time' teaching.

So, as you plan your preparation for the course you might want to set aside 3-4 weekends to read the necessary readings, complete the associated exercises and send your completed pre-class assignments through for analysis. Equally, you will need to spend two hours per hour of contact working on the formal class assessments for each of the four modules of the course. For example, you will receive eight hours of classroom contact related to Assignment 1 so you will need to spend about 16 hours working on it after class.

## Attendance

This innovative qualification is a blended learning programme and includes face-to-face training which takes place over six days (in two blocks of three full days). It's compulsory for all students to attend these training blocks.

### Q: What happens if I miss one of the sessions or one of the days?

You are expected to attend every session, every day; failure to attend any of the sessions will seriously disrupt your learning experience and the shared learning experience of your group. If, for unforeseen circumstances, you are unable to attend a session please contact the team by emailing [academy@institute-of-fundraising.org.uk](mailto:academy@institute-of-fundraising.org.uk) or [diploma@afpnet.org](mailto:diploma@afpnet.org) as soon as possible so that we can inform your tutors. Failure to attend is likely to have a negative impact on your ability to complete the course successfully; you will be expected to take responsibility to find out what you have missed.

### Q: What are the timings for the face to face training days?

Approximately 09:00 – 17:00, please arrive promptly to ensure the course can begin on time.

### Q: What is 'Just in Time' teaching?

The face to face training sessions are constructed using a series of exercises students must complete and submit before each block. Sessions will then be developed based on where participants are with their learning and using their examples. This eliminates the need to rebaste basic material that all participants grasped. This results in a better learning experience for all.

### Q: What support can I expect?

As you will be working towards a recognised professional qualification at a Master's level there is a strong emphasis on independent learning. This course is designed to be a "student-led" educational experience and you are expected to take responsibility for your own learning, investing a great deal of time and effort in preparing for every session. All our course tutors have expert knowledge of their field and relevant teaching experience, so you are sure to get professional advice and support.

You will be guided to topics and encouraged to explore them further. We encourage students to reflect on course materials, critique them and form their own ideas. Rather than learning about fundraising concepts/ideas for their own sake, you should aim to reflect on their relevance to your own professional practice and think through how you might develop them further to increase their utility. You should use this opportunity to develop your critical reasoning and analytical skills. In other words, be prepared to challenge and be challenged!

You will be expected to manage your own time in order to meet assignment deadlines. A key part of learning independently is being able to seek additional help or guidance. You are encouraged to research information and answer questions yourself. Your tutor will not complete your assignments for you or review your draft assignment prior to submission. When your assignments are marked you will be provided with a marking grid which will breakdown your allocation of marks towards your grade and provide written relevant and constructive feedback to allow you to improve and succeed in your studies. If you do need further advice please email: [academy@institute-of-fundraising.org.uk](mailto:academy@institute-of-fundraising.org.uk) or [diploma@afpnet.org](mailto:diploma@afpnet.org) and we will endeavour to assist you.

### Q: I understand there are strict deadlines for the assignments, what happens if I can't meet these?

As a Masters level recognised professional qualification it is essential your self-study skills are highly developed. You are expected to commit the necessary time and plan your work effectively to ensure you meet the course deadlines that you are set. You need to complete and pass all the assignments to be awarded the Advanced Diploma.

### Q: How long are the assignments I have to write, is there a word count?

Details of the assignment requirements can be found in this Course Handbook, there are word counts for each assignment and these must be adhered to. If you need any clarification please ask your tutors for advice before you begin your assignment.



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