

# Syllabus

## EFA Fundraising Syllabus

The EFA Syllabus for fundraising training divides the teaching content into six Main Teaching Areas (S 1 - S 6) which are sub-divided into Specified Teaching Areas (S 1.1; S 1.2, etc.) indicating the qualification required by the teacher for each teaching area. It also links the six Main Teaching Areas (S 1 - S 6) to the four Key Areas of the EFA Certification Competence Framework (CF 1 - CF 4). The form of a table allows a full cross reference between the EFA Syllabus and the EFA Competence Framework.

The following table gives an overview of the six Main Teaching Areas and the required hours spent on the teaching areas to develop the required competencies within the EFA Certification. The EFA Fundraising Training Programme is devised to last 300 hours (minimum) in order to allow the required competencies to develop and to meet the assessment requirements.

Main Teaching Areas	Teaching Hours	Other Learning Hours	Research and Reports	Assesment and Preparation
S 1 Social & Cultural Context	2	8		
S 2 FR-Management	16	30		
S 3 FR-Strategies	20	50		
S 4 FR-Methods	24	45		
S 5 FR-Forms	16	29		
S 6 Legal Regulations	2	8		
Total	80	170	30	20
300 hours (1 teaching/other learning hour = 60 mins)				

As much as there are universal principals to fundraising, EFA aims at fundraising training programmes that are tailored to blend into the specific national social and cultural contexts – also taking into account specific organisational contexts to assure professional standards and a lasting success in fundraising. Reflecting on the social and cultural context of fundraising (S 1) is therefore an integral part of the fundraising syllabus.

Fundraising Management (S 2) is looked at and dealt with here at an institutional level. The (personal) management skills and (technical) management tools needed in order to act professionally are dealt with in S 4 (Fundraising Methods).

Strategic decisions in fundraising are dealt with in Fundraising Strategies (S 3). They are based on the institutional vision (S 2.1) and involve detailed knowledge about (potential) donors, basic strategical options and means of analysis.

Fundraising Methods (S 4) refer to (personal) skills and (technical) tools, including different communication channels.

“How to do” a particular fundraising form is specified in S 5. It draws upon the knowledge gained within the other Main Teaching Areas.

Last but not least, fundraising also has a regulatory framework which needs to be introduced to candidates aiming at professional standards in fundraising. (S 6).

### Key to read the tables integrated into the Syllabus:

teacher qualifications:

**fp** = fundraising practitioner

**g** = generalist

### Key to read the requirements of the Competence Framework:

**CF 1.1** : identify an organisation's fr requirements

**CF 1.2** : establish a case for support

**CF 1.3** : present a case for support

**CF 2.1** : research and analyse information to support an organisation's fr strategy

**CF 2.2** : plan, organise and allocate fr resources

**CF 2.3** : manage a productive relationship with suppliers

**CF 3.1** : develop a fr strategy

**CF 3.2** : problem solving

**CF 3.3** : implement the fundraising operation

**CF 3.4** : evaluate the effectiveness of the fr strategy

**CF 3.5** : evaluate the effectiveness of fundraising

**CF 4.1** : self-management

**CF 4.2** : working with others to achieve organisational objectives

Normally each main teaching area needs to be covered by a generalist as well as a fundraising practitioner, except S 5 (fp only), and S 6 (g only). The involvement of fundraising practitioners suggested here is normally regarded as a minimum requirement whereas the involvement of generalists is regarded as a maximum.

## Main Teaching Area S 1: SOCIAL AND CULTURAL CONTEXTS OF FUNDRAISING

As much as there are universal principals to fundraising the EFA fundraising training programme sets out to be tailored to the specific national contexts – also taking into account specific organisational contexts to perform fundraising professionally.

S 1 Social and Cultural Contexts of Fundraising	Specified Teaching Areas	Teacher Qualific.	Suggested Teaching Content	CF 1 Communicating Case for Support			CF 2 Managing Resources			C 3 Managing Fundraising					CF 4 Managing People		
				CF1.1	CF1.2	CF1.3	CF2.1	CF2.2	CF2.3	CF3.1	CF3.2	CF3.3	CF3.4	CF3.5	CF4.1	CF4.2	
S 1.1 The Third Sector	The fundraising market (national + European)	<b>g</b>	- existing sources for (market) research relevant to fundraising - results of market research as relevant to fundraising - different areas of fundraising	<b>x</b>			<b>x</b>				<b>x</b>						
	Cultural, political and social background of fr (national + European)	<b>g</b>		<b>x</b>			<b>x</b>				<b>x</b>						
S 1.2 Cultural and Ethical Dimensions of Fundraising	in the national and european context	<b>fp</b>	key issues of ethics	<b>(x)</b>	<b>x</b>		<b>x</b>				<b>x</b>		<b>x</b>				
	in the organisational context	<b>fp</b>	key issues of ethics	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>				<b>x</b>		<b>x</b>				

## Main Teaching Area S 2: FUNDRAISING MANAGEMENT (INSTITUTIONAL LEVEL)

Fundraising Management is dealt with here at an institutional level. The (personal) management skills and (technical) management tools needed in order to act professionally are dealt with in S 4 (Fundraising Methods).

S 2 Fundraising Management (Institutional Level)	Specified Teaching Areas	Teacher Qualific.	Suggested Teaching Content	CF 1 Communicating Case for Support			CF 2 Managing Resources			C 3 Managing Fundraising					CF 4 Managing People		
				CF1.1	CF1.2	CF1.3	CF2.1	CF2.2	CF2.3	CF3.1	CF3.2	CF3.3	CF3.4	CF3.5	CF4.1	CF4.2	
S 2.1 Institutional Requirements for Fundraising	Institutional readiness	<b>g</b>	- institutional vision and mission - branding - corporate identity - corporate design	<b>x</b>	<b>x</b>		<b>x</b>			<b>x</b>			<b>x</b>				
	Financial resources	<b>g</b>	- investment into fr resources	<b>x</b>	<b>x</b>		<b>x</b>			<b>x</b>			<b>x</b>	<b>x</b>			
	Personal resources	<b>fp</b>	- the role of the board in fr - the role of (qualified) fr staff - the role of fr training - volunteers in the fundraising process	<b>x</b>	<b>x</b>		<b>x</b>			<b>x</b>			<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>	
	Technical resources	<b>g</b>	other resources than database (S 4.3)	<b>x</b>	<b>x</b>		<b>x</b>			<b>x</b>			<b>x</b>	<b>x</b>			
S 2.2 Implementing Fundraising into an Organisation's Management	Implementing fr into the organisation's management	<b>fp</b>	- change management / institutional development - organisational structures - advocacy	<b>(x)</b>		<b>(x)</b>		<b>x</b>		<b>x</b>	<b>x</b>		<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>	
S 2.3 Working with Suppliers	Working with suppliers	<b>fp</b>	- commercial and pro bono relations - elements/components of a briefing					<b>x</b>	<b>x</b>							<b>x</b>	<b>x</b>
S 2.4 Budget Planning		<b>g</b>	- income forecast - expenditure forecast		<b>x</b>		<b>x</b>	<b>x</b>		<b>x</b>			<b>x</b>	<b>x</b>			
S 2.5 Quality Management	Efficiency control	<b>fp/g</b>	return on investment (see S 4.3)		<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>		<b>x</b>			<b>x</b>	<b>x</b>			

## Main Teaching Area S 3: FUNDRAISING STRATEGIES

Strategic decisions in fundraising are part of fundraising management. They are based on the institutional vision (S 2.1) and involve detailed knowledge about basic strategic options, (potential) donors and means of analysis.

S 3 Fundraising Strategies	Specified Teaching Areas	Teacher Qualific.	Suggested Teaching Content	CF 1 Communicating Case for Support			CF 2 Managing Resources			CF 3 Managing Fundraising					CF 4 Managing People	
				CF1.1	CF1.2	CF1.3	CF2.1	CF2.2	CF2.3	CF3.1	CF3.2	CF3.3	CF3.4	CF3.5	CF4.1	CF4.2
S 3.1 Strategic Planning of Fundraising Activities	General options for fundraising strategies	<b>fp</b>	fundraising cycle (need, audience, forms, evaluation)	x	x		x	x		x			x	x		
	Strategies of strategic planning	<b>g/fp</b>	- steps in strategic planning - setting objectives - project management - campaigning	x	x	x	x	x	x	x			x	x	x	x
S 3.2 Managing Donor Relations	Motives for giving	<b>fp</b>	- motives of individual giving - motives of corporate giving		x	x	x			x			x			
	Donor identification and segmentation	<b>fp</b>	- fundraising pyramid - means of donor segmentation and identification		x		x			x			x			
	Donor relationship management	<b>fp</b>	- donor solicitation - donor cultivation - donor recognition - complaint management		x					x			x	x	x	x
S 3.3 Tools for Fundraising Strategies	Techniques of analysis	<b>g</b>	- SWOT - Stakeholder Analysis - STEP/PEST - competitor Analysis	x	x		x	x	x	x	x	x	x	x		x

## Main Teaching Area S 4: FUNDRAISING METHODS (SKILLS AND TOOLS)

Fundraising Methods are skills and tools, as well as different communication channels, that are fundamental to the whole process of fundraising.

S 4 Fundraising Methods (Skills and Tools)	Specified Teaching Areas	Teacher Qualific.	Suggested Teaching Content	CF 1 Communicating Case for Support			CF 2 Managing Resources			CF 3 Managing Fundraising					CF 4 Managing People		
				CF1.1	CF1.2	CF1.3	CF2.1	CF2.2	CF2.3	CF3.1	CF3.2	CF3.3	CF3.4	CF3.5	CF4.1	CF4.2	
S 4.1 Fundraising Communication Channels	Interrelation between fundraising and public awareness	<b>g</b>	- effective use of media for fr (including branding, campaigns, PR, news management)		<b>x</b>	<b>x</b>					<b>x</b>				<b>x</b>		
	Overview of different communication channels	<b>fp</b>	- mass media, online communication, mailings, telephone, stalls, events, merchandising and product selling, face to face, multi-channel-communication		<b>x</b>	<b>x</b>				<b>x</b>			<b>x</b>	<b>(x)</b>			
					<b>x</b>	<b>x</b>	<b>x</b>			<b>x</b>			<b>x</b>				
S 4.2 Skills for Fundraising	Self-management	<b>g</b>	- self reflexion - developing your own potential and competencies - time management								<b>x</b>	<b>x</b>				<b>x</b>	<b>x</b>
	Team work	<b>g</b>	- leadership styles - share responsibility - empowerment - motivation - feedback - managing volunteers								<b>x</b>	<b>x</b>				<b>x</b>	<b>x</b>
	Communication	<b>g</b>	- psychology of communication - problem solving - negotiation - presentation - creativity		<b>x</b>	<b>x</b>		<b>x</b>			<b>x</b>	<b>x</b>	<b>(x)</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>
S 4.3 Tools for Fundraising	Database	<b>g</b>	- requirements for fr-database - maintaining donor records		<b>x</b>		<b>x</b>				<b>x</b>						
	(Market) research	<b>g</b>	how to conduct basic research		<b>x</b>		<b>x</b>				<b>x</b>			<b>x</b>			
	Techniques of evaluation	<b>g</b>	- cost benefit ratio (see S 2.5) - a variety of evaluation techniques as appropriate		<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>	<b>x</b>		<b>x</b>	

## Main Teaching Area 5: FUNDRAISING FORMS

“How to do” a particular fundraising form draws upon a knowledge of all the other Main Teaching Areas.

S 5 Fundraising Forms	Specified Teaching Areas	Teacher Qualific.	Suggested Teaching Content	CF 1 Communicating Case for Support			CF 2 Managing Resources			CF 3 Managing Fundraising					CF 4 Managing People		
				CF1.1	CF1.2	CF1.3	CF2.1	CF2.2	CF2.3	CF3.1	CF3.2	CF3.3	CF3.4	CF3.5	CF4.1	CF4.2	
	Gifts from individuals	<b>fp</b>	- overview of different forms/ programmes to generate gifts from individuals: e.g. raffles, charity shops, sponsorship		<b>x</b>		<b>x</b>				<b>x</b>			<b>x</b>	<b>(x)</b>		
	Corporate fundraising	<b>fp</b>	sponsoring - corporate giving/partnership		<b>x</b>		<b>x</b>				<b>x</b>		<b>x</b>	<b>x</b>	<b>(x)</b>		
	Major giving	<b>fp</b>	- elements/components of major giving programmes - legacies		<b>x</b>		<b>x</b>				<b>x</b>		<b>x</b>	<b>x</b>	<b>(x)</b>		
	Grants from trusts and foundations	<b>fp</b>	- elements of an application to trusts and foundations		<b>x</b>		<b>x</b>				<b>x</b>		<b>x</b>	<b>x</b>	<b>(x)</b>		
	Statutory grants (government)	<b>fp</b>	- differences of application at a regional, national or European level		<b>x</b>		<b>x</b>				<b>x</b>		<b>x</b>	<b>x</b>	<b>(x)</b>		

## Main Teaching Area S 6: LEGAL AND OTHER REGULATIONS

A basic understanding of the regulatory framework of fundraising is an integral part of professional fundraising.

S 6 Legal and Other Regulations	Specified Teaching Areas	Teacher Qualific.	Suggested Teaching Content	CF 1 Communicating Case for Support			CF 2 Managing Resources			CF 3 Managing Fundraising					CF 4 Managing People		
				CF1.1	CF1.2	CF1.3	CF2.1	CF2.2	CF2.3	CF3.1	CF3.2	CF3.3	CF3.4	CF3.5	CF4.1	CF4.2	
	Data protection	<b>g</b>			<b>x</b>						<b>x</b>		<b>x</b>				
	Right of exploitation/ Copyright	<b>g</b>			<b>x</b>						<b>x</b>		<b>x</b>				
	Competition law	<b>g</b>			<b>x</b>						<b>x</b>		<b>x</b>				
	Fiscal law with regard to donations and foundations	<b>g</b>	- VAT - tax deduction on gifts		<b>x</b>						<b>x</b>		<b>x</b>				