

# FUNDAMENTALS OF FUNDRAISING



Are you thinking of entering the world of philanthropy or do you have only a few years of experience? Does your organization want to develop or strengthen its philanthropic development capacity? **The Fundamentals of Fundraising Course is for you!**

## **COURSE OVERVIEW**

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As the name suggests, this course is designed to provide participants with an overview of the fundamentals of fundraising. It is ideally suited for those new to the profession with less than five years of experience.

The course addresses the roles and responsibilities of the philanthropic professional, with an emphasis on the responsibilities that novices are likely to assume early in their careers. The modules are as follows: Overview of Fundraising, Developing an Integrated Fundraising Program, Marketing for Ongoing Success, Building & Sustaining Relationships, Securing the Gift, Volunteers – Partners in Fundraising and Management & Accountability.

### **Module 1 – Overview of Fundraising**

A big-picture look at professional fundraising, including the important role philanthropy plays in organizations and key motivations behind why people give. Also included: the primary sources of contributions; what an integrated development program looks like and which essential components aid success; the fundraising profession as a career, focusing on key qualities for success and a basic path for personal and professional development in the field; an introduction to professional standards and ethics.

### **Module 2 – Developing an Integrated Fundraising Program**

To effectively raise funds for an organization's mission, it's important to have a comprehensive plan in place that articulates the organization's case for support and includes appropriate giving opportunities. This module covers the importance of connecting that comprehensive plan with the organization's overall mission and strategic plan. The module features an overview of campaign types (annual giving, major gifts, planned giving) with a focus on the key role of annual giving. Content will include establishing/ensuring that appropriate policies and procedures are in place to both ensure integrity of donor intent and to honor donors/volunteers in appropriate ways.

### **Module 3 – Marketing for Ongoing Success**

Communicating information about fundraising activities to appropriate audiences (donors and prospects alike) and keeping all stakeholders informed about the organization's progress is critical to ongoing and future success. Effective marketing is a key part of building and sustaining relationships for fundraising purposes. This module will cover creating a plan for marketing and communications activities that support development goals and strategies. It will also touch on the growing roles and importance of the Internet and social media in fundraising.



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## **Module 4 – Building & Sustaining Relationships**

Relationships are the key to fundraising success, and successful relationships start with knowing current and prospective donors well. This module will introduce the powerful role of prospect and donor research, including identifying and segmenting prospects and donors according to appropriate variables as well as effective donor records management to support ongoing relationships. Finally, cultivation, establishing and maintaining relationships with individuals and organizations, and optimizing relationships to retain donors rounds out the module.

## **Module 5 – Securing the Gift**

Once the development plan is in place and appropriate policies and procedures are set up, it's time to actively solicit gifts from donors and prospects. In this module, a closer look will be taken at solicitation strategies for campaign types, focusing most closely on solicitation techniques for annual giving. Additionally, there will be an overview of techniques for soliciting major and planned gifts. Special emphasis will be placed on implementing critical acknowledgement, acceptance, and recognition practices.

## **Module 6 – Volunteers – Partners in Fundraising**

Fundraising just wouldn't be possible without dedicated volunteers supporting the organization's efforts. Establishing and maintaining a respectful relationship with volunteers is both art and science, beginning with how they are recruited. This module will explore effective ways volunteers can be recruited, trained, managed, motivated, evaluated, and recognized. As importantly, there are times when volunteers are best included in the development process to ensure they experience a sense of ownership in the organization's work and can effectively perform their roles.

## **Module 7 – Management & Accountability**

Fundraising is about more than soliciting donors and prospects, and the development office is responsible for managing the development plan. This module will present an overview of the management aspects of fundraising including budgeting, records management, gift processing, program evaluation, and the key roles and responsibilities of staff and volunteer leadership. The module ends with a look at accountability, basic legal requirements, and fundraising ethics in practice.

## **TEACHERS**

Consult the list of teachers on our website.

<https://afpquebec.ca/en/events-and-learning/conferences/2024-fundamentals-of-fundraising-course/#faculty>

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## **BENEFITS FOR THE EMPLOYER**

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By providing your employee with access to the Fundamentals of Fundraising Course, you:

- Ensure a quick and thorough acquisition of a solid foundation in ethical fundraising
- Enable your organization to build expertise backed by the expertise and experience of a global network of 30,000 fundraising professionals
- Provide a unique opportunity to network and connect with other philanthropic professionals
- Provide a cost-effective opportunity to participate in a rewarding and engaging professional development activity
- Invest in the financial development of your organization

## **HOW TO REGISTER**

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The next Fundamentals of Fundraising Course will take place on May 30 and 31, 2024 at the Centre St-Pierre (room 105), located at 1212 Panet Street in Montreal.

Member rate: \$495 plus tax

Non-member rate: \$595 plus tax

\* \$25 discount per person if 2 or more registrations from the same organization

Register online now!

<https://afpquebec.ca/en/events-and-learning/conferences/2024-fundamentals-of-fundraising-course/>

## **APPLY FOR A SCHOLARSHIP**

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AFP Quebec is proud to offer 6 scholarships of \$250 each to reduce the costs of participating in The Fundamentals of Fundraising Course, offered annually. Please apply no later than April 30, 2024.

See details and selection criteria on our website.

<https://afpquebec.ca/en/membership-and-benefits/scholarships/#FFC>