

SFT F1

Assist with planning fundraising activity



Overview

This standard is about assisting the work of fundraisers as they develop a fundraising plan. This could concern a specific fundraising project or cover fundraising activities more generally. You will need to support the fundraising planning process, which may include identifying potential sources of funding and resources. You will need to present information in the format agreed with the relevant person and review the information you have collected in order to contribute your own suggestions to the fundraising plan.

You must confirm the scope of your work and identify the deadlines that you will need to work to with the relevant person.

This standard is appropriate for people new to fundraising and those supporting fundraising activities in your organisation.

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Performance criteria

You must be able to:

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| P1 | confirm the scope and deadlines for your tasks with the relevant person |
| P2 | plan and prioritise your workload in consultation with the relevant person |
| P3 | identify sources of potential funding and resources as directed by the relevant person |
| P4 | identify and review relevant sources of fundraising information |
| P5 | use the most appropriate sources of information to ensure they are relevant and up to date |
| P6 | record all sources of information and store this with the results of your research |
| P7 | present the material in a format that meets the needs of the target audience |
| P8 | provide information from your findings to the relevant person to inform fundraising planning |
| P9 | seek advice whenever necessary in order to complete your assigned tasks in line with organisational requirements |

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Knowledge and understanding

You need to know and understand:

Context specific

- K1 the aims, ethics, culture, past history and mission of your organisation
- K2 the organisation's case for support
- K3 the organisation's current approach to fundraising
- K4 the scope and objectives of the relevant fundraising plan
- K5 the scope and context of the research you are required to undertake
- K6 the nature of the information required and how it will inform the fundraising plan
- K7 the timescale within which your tasks must be complete
- K8 who the relevant person is to clarify and agree the tasks that you are required to carry out
- K9 who the relevant person is to ask for advice and feedback

Sector specific

You need to know and understand:

- K10 how and where to access information about funding sources and resources
- K11 the appropriateness of different sources of funding and resources
- K12 how to locate and interpret fundraising data

General

You need to know and understand:

- K13 how to maintain records of your work
- K14 how to present your findings and make suggestions to the relevant person in a clear and concise manner

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Additional Information

External Links

The Institute of Fundraising's Code of Fundraising Practice and the International Statement of Ethical Principles in Fundraising should be read alongside this NOS.

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