

SFT F12

Develop and implement a plan for corporate fundraising activity



Overview

This standard is about raising funds and other resources from corporate supporters and partners. This support may include monetary donations, gifts in kind, pro bono donations of staff time or staff secondments, access to staff for fundraising activities, partnerships, payroll giving, sponsorship or access to staff and customers for fundraising purposes.

The fundraising cycle has four key phases – research, plan, implement and review – all of these must be considered as you develop a clear and achievable plan to secure corporate support, involving other colleagues or stakeholders where possible in the planning process. It will identify how you are going to secure funds and other resources from corporate supporters, the methods you will use, resource requirements and what your corporate supporters expect to achieve as a result. It is likely that your plan will form part of your organisation's overall fundraising strategy.

This standard has two elements

- 1 Develop a plan for corporate fundraising activity
- 2 Implement a plan for corporate fundraising activity

This standard is appropriate for people responsible for developing and delivering operational plans to support the implementation of your organisation's overall fundraising strategy.

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Performance criteria

Develop a plan for corporate fundraising activity

You must be able to:

- P1 clarify the scope of your responsibilities and what is expected of you in terms of fundraising targets
- P2 review the corporate environment to identify and create relevant corporate fundraising opportunities, including
 - P2.1 relevant trends
 - P2.2 critical issues
 - P2.3 competitor activity
 - P2.4 giving patterns
- P3 review the performance of past corporate fundraising to improve future practice
- P4 establish a timescale and objectives for the corporate fundraising plan in line with organisational requirements
- P5 conduct prospect research and prioritise potential supporters and partners in line with the aims of your organisation and corporate fundraising plan
- P6 develop the case for support that meet the needs of your target audience
- P7 select fundraising techniques and approaches in accordance with the available resources
- P8 maintain records of potential supporters and partners in line with organisational requirements
- P9 discuss your corporate fundraising plan with your line manager and other relevant colleagues or stakeholders and seek authorisation for its go ahead as necessary

Implement a plan for corporate fundraising activity

You must be able to:

- P10 provide details in your plan on what you aim to achieve, how, by whom and by when
- P11 check that potential corporate supporters approached and agreements made are consistent with any **ethical policy** your organisation holds
- P12 negotiate appropriate relationships with corporate supporters and partners that are consistent with their needs, the aims of your organisation and the value of your brand
- P13 communicate the requirements and expectations of the corporate supporter to the relevant people within your organisation
- P14 co-ordinate with colleagues working in other areas of fundraising to prevent duplication of effort in approaching particular individuals or organisations for support
- P15 implement the corporate fundraising plan according to its steps and schedule
- P16 maintain and update records in line with organisational requirements

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- P17 monitor the implementation of your plan in line with organisational requirements
 - P18 evaluate the success of your corporate fundraising activity against agreed objectives

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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 **ethical policy** of your organisation as it applies to **corporate support and partnerships**
- K3 your organisation's brand; its structure, personality and value
- K4 the deadlines and scope of your work
- K5 the resources at your disposal including staff, volunteers, time, money and specialist advice
- K6 how to access information regarding potential and current corporate supporters, especially their current criteria for support and patterns of past support
- K7 the details that you need to include within your plan including
 - K7.1 the objectives you are planning to meet
 - K7.2 the approaches you have selected
 - K7.3 a schedule of key activities
 - K7.4 the timescale
- K8 who needs to approve and authorise your plan and the processes within your organisation for consultation and approval
- K9 the importance of consulting with colleagues and other stakeholders during the development of the plan and how to do this effectively
- K10 how to monitor the implementation of your plan and evaluate its success
- K11 how to provide corporate supporters with meaningful information for the implementation of the plan in order to
 - K11.1 sustain their trust
 - K11.2 obtain feedback
 - K11.3 monitor the ongoing relationship with them
- K12 how to draft partnership agreements or memoranda of understanding, or, as appropriate, who to approach to have these drawn up
- K13 how to maintain records of your work

Sector specific

You need to know and understand:

- K14 corporate giving behaviour, specifically the motives for business support of nonprofits, how decisions about support are taken and how the success of such relationships is typically evaluated
- K15 the tax benefits that apply to various forms of corporate giving and where to seek information regarding these
- K16 the risks and benefits of entering into partnerships with corporate supporters and how to monitor and evaluate these
- K17 the impact of legislation, regulation and codes of practice on corporate fundraising and where to seek information regarding these issues
- K18 the forms that corporate support might take and how to administer

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- these, including
 - K18.1 cash donations
 - K18.2 gifts in kind
 - K18.3 gifts of stocks or shares
 - K18.4 sponsorship
 - K18.5 payroll giving
 - K18.6 cause related marketing
- K19 how to write a clear and comprehensive corporate fundraising plan
- K20 how to monitor the implementation of your plan and evaluate success

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Additional Information

Glossary

Ethical policy refers to a statement which defines the principles on which the charity bases its involvement with third party organisations

Corporate partnerships refer to a relationship entered into with a corporate body, usually based on a contract, which delivers benefits to both the charity and the corporate body.

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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Developed by	Skills Third Sector
Version number	2
Date approved	November 2012
Indicative review date	November 2017
Validity	Current
Status	Original
Originating organisation	UK Workforce Hub
Original URN	SFT F12
Relevant occupations	Business, Administration and Law; Media and communication; Business Management; Marketing and Sales; Administration and Secretarial Occupations; Communications; General; Public Service and Other Associate Professionals; Managers and Senior Officials; Managers and leaders with responsibility for interagency working
Suite	Fundraising
Key words	Fundraising; corporate sponsorship; corporate social responsibility; marketing; payroll giving; volunteering; volunteers