



IDPE & CIOF CERTIFICATE IN FUNDRAISING COURSE HANDBOOK

November 2022 Cohort

idpe.org.uk
ciof.org.uk

Introduction to IDPE & CIOF Certificate in Fundraising Handbook

The Institute of Development Professionals in Education (IDPE) and the Chartered Institute of Fundraising (CIOF), have joined forces once more to offer the Certificate in Fundraising qualification, designed specifically to include examples and case studies relevant for those working in schools' development.

For all of us, this continues to be a time of great change and for many a time of challenge. However, the need for fundraising has never been greater, as we continue to adapt to the impact of the pandemic while facing rising costs and global insecurity. From offering new opportunities and developing facilities, to improving access to education for the most disadvantaged, schools will need to accelerate their fundraising to provide further support for their young people.

Now is a good time for us to reflect upon and renew our commitment to our own personal and professional development. The IDPE and CIOF Certificate in Fundraising is the only qualification specifically designed for those working in schools' development, and offers students the chance to consolidate existing fundraising skills and to learn new techniques, to adapt and evolve their schools' fundraising strategy... no matter what the future holds.

We are delighted that our organisations are working together, to offer the virtual IDPE and Chartered Institute's Certificate in Fundraising, for fundraising professionals in schools. It's an exciting learning opportunity for schools' development professionals to come together and share examples of best practise in the context of evidence-based theory.

We wish students every success in their learning and fundraising. Together with our members, we want to demonstrate the highest of standards and support schools to achieve fundraising success.

Louise Bennett, Joint CEO

Institute of Development Professionals in Education (IDPE)

Katie Docherty, CEO

Chartered Institute of Fundraising

We are delighted you are considering studying for this Qualification. We warmly encourage you to take the plunge because it will give you the theoretical and practical background you need for any job in the schools' development and fundraising profession. This handbook outlines exactly what you'll be studying in the four units of the Certificate and the assignments you will be expected to complete.

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Please review the full terms and conditions before booking: <http://www.institute-of-fundraising.org.uk/events-and-training/qualifications/qualifications-terms-and-conditions/>

Course structure

The course is structured in four units. By the end of the Certificate participants will have a firm understanding of the fundraising environment, donor behaviour and how to plan the fundraising activities that they personally are responsible for.

The Certificate also includes a particular focus on the topics of building relationships with your community, alumni relations and event management since these are among the most common forms of fundraising and development. We will examine both the range of techniques used in community fundraising and the recruitment and retention of volunteers or managing support.

Curriculum content statement

Please be aware that our courses cover a range of situations and issues that may be sensitive and challenging. We present these in a variety of ways that reflect how they might appear or arise in the workplace. Occasionally these situations or issues might feel confrontational or 'in your face' and while this might not be our intention, we recognise that within fundraising there are many opportunities when you may encounter issues that cause concern, distress, potential reputational damage, or personal challenge.

Charities are frequently providing services or campaign in complex and highly emotional areas including abuse and exploitation, life limiting situations, and social injustice. In our courses we recognise the importance of providing material, simulations, activities, case studies and 'real life' examples of situations you may experience as a fundraiser. Some of these may mean that you could feel emotional, uncomfortable, compromised, or excessively challenged. Our aim is to provide controlled environments to enable the development of understanding,

compassion, evidence-based responses, reflection, and professional growth. We also offer additional guidance, information and support if an individual student or a group are feeling emotionally challenged or uncomfortable.

Please let us know if issues that are explored in the course have been difficult or challenging and we will make every effort to provide support, additional material or opportunities for discussion and exploration. Your tutors, the Central Services team and others are committed to your safety and success during your time with us

The four units are as follows:

The Fundraising Environment:

This provides an overview of the legal and regulatory frameworks which control fundraising practice in the four countries of the union. It also provides an introduction to the not for profit sector and the topics of philanthropy and fundraising ethics. The unit concludes by providing a framework that may be employed to appraise the environment and conduct a detailed external fundraising audit.

Understanding Donor Behaviour:

This unit provides an introduction to some of the latest thinking and research on donor behaviour. It explores the questions of who gives and why they give, before introducing two distinct approaches to modelling the factors that influence individual donor behaviour. It will then examine group influences on this behaviour examining how psychological theory can be used to increase the value of donations, while enhancing the value that donors personally derive from their giving. The unit also examines how information in respect of donor behaviour can be used to develop a case for support, case expressions and to plan 'supporter journeys'. The unit concludes with an introduction to the research techniques that can be commissioned to provide fundraisers with this information.

Designing Donor Communication:

This unit provides an introduction to the principles of communication design. We will explore the role of perception and learning in the communications process and how to design communications that maximise their effectiveness. We will also introduce a formal process that can be used to conduct an audit of existing communication. The unit concludes with a consideration of storytelling and how to write effective donor centric copy. It will also consider issues of design such as the creation of appropriate headlines, the use of appropriate fonts and the role of colour/imagery.

Fundraising Planning:

This unit provides a framework that can be used for the purpose of fundraising planning. Participants will learn how to write meaningful fundraising objectives and the strategies and tactics that can be used to achieve them. Participants will be introduced to strategic issues such as segmentation, positioning, branding and case for support. The unit also provides an introduction to each of the key forms of fundraising and the notion of a fundraising mix.

Course resources

A wide range of resources are available to support you in your studies.

Students need to purchase the course textbook:

Sargeant, A. and Jay, E. (2014) *Fundraising Management: Analysis Planning and Practise* (3rd Edition), Routledge, London.

This book was developed specifically to support the IoF qualification framework. Beyond this, we draw a distinction between required reading and wider reading.

Required readings are listed in this handbook and will be posted as PDF files or links on the Academy learning platform. We will refer to these in our course sessions and you should aim to build these into your reading schedule. It is not necessary to read these in advance unless we specifically request this, but you will find that these materials add value by deepening your understanding of many course ideas and concepts. It is not essential that you undertake any wider reading, but from experience with previous courses we know that participants will often be interested in exploring specific issues or forms of fundraising in more detail. This course handbook also offers some suggestions of additional reading to support each unit and you will find further suggestions posted on:

www.studyfundraising.info

You should also regard the Fundraising Regulator's Code of Fundraising Practice as a course resource, and ensure that you read those areas that pertain to the forms of fundraising you are personally involved with. You should regularly check for updates to the Code of Fundraising Practice.

www.fundraisingregulator.org.uk

The IDPE members' area has a range of resources and case studies available that may support your learning and don't forget the IDPE community, our members' forum is the perfect place to ask questions or seek information to support you in completing each unit.

Course Syllabus

Unit 1: The Fundraising Environment

Introduction to the Not For Profit Sector:

Scale, scope and role of the sector, organisational forms, categories of not for profit, charitable status, requirements for charitable status, legal forms, role of the Charity Commission, recent changes to charity law, sources of not for profit income, trends in not for profit income, determinants of not for profit income. Regional variations between regulatory environment and bodies across Scotland, Wales and Northern Ireland and implications for cross-border fundraising.

Tax Effective Giving:

Giftaid, tax relief on Corporate tax relief, tax efficient gifts from donors living abroad, tax and legacy giving. Overview of payroll giving.

Introduction to Philanthropy:

The definition and role of philanthropy in the not for profit sector. Philanthropy in the global context. Social role of fundraising: history and development of the profession. Role of the fundraiser, types of fundraiser, fundraising careers.

Ethics, Regulation and Best Practice:

Ethical frameworks, codes of conduct, ethical and values based decision making, ethical policies and their development. Common ethical dilemmas in fundraising. Specialised organisations promoting ethics in fundraising. IoF Code of Conduct, Fundraising Code of Practice, role and rationale for Fundraising Regulator,

operation of the self-regulation of fundraising scheme, fundraising preference service, national occupational standards for fundraising. Role of other key regulatory bodies (i.e. Charity Commission and Advertising Standards Authority). Data protection and latest thinking in respect of best practice with regard to the use of personal data.

The Fundraising Audit:

The purpose of a fundraising audit, structure and content. External fundraising audit: STEEPLE Analysis, competitor analysis, collaborative analysis, supporter/stakeholder analysis. Internal fundraising audit: product/service life cycle, nonprofit portfolio analysis (including advantages and disadvantages of portfolio models), interpretation of simple fundraising metrics. SWOT analysis: strengths, weaknesses, opportunities and threats analysis, methods of prioritising factors, interpretation of findings.

By the end of this unit participants should be able to:

- Distinguish between the not for profit and charity sectors and understand the requirements to become a charity.
- Understand and describe the variety of different organisational forms that a charity might take.

Continued overleaf...

- Describe trends in each of the key sources of sector income (individuals, foundations/trusts and corporates).
- Utilise a wide range of secondary sources of information on fundraising.
- Understand the role and development of philanthropy in society.
- Resolve common ethical dilemmas in fundraising using advice and guidance from a variety of different sector sources.
- Source appropriate advice and codes of conduct to assist in ethical decision making.
- Describe how the practice of fundraising is regulated in the UK.
- Conduct a fundraising audit for a focal nonprofit organisation.
- Utilise a wide range of sources of information in compiling a fundraising audit.

Course Syllabus

Unit 2: Understanding Donor Behaviour

Individual Giving:

Demographic, attitudinal and lifestyle characteristics of donors and non-donors. Factors driving differences in behaviour.

Motives for Individual Giving:

Familial utility, personal utility, demonstrable utility, spiritual utility and emotional utility. Influence of religion/faith on giving. Categories of donor by value: low value donors, mid level donors, major donors and variations in motives for giving.

Content and Process Models of Giving Behaviour:

(e.g. Sargeant and Shang 2010, Sargeant and Woodliffe 2007, Burnett and Wood 1988). Barriers to giving and causes of donor attrition. Individual and family decision-making processes.

Group and Environmental Influences on Behaviour:

Role of identity, donor identity, symbolic social identity, moral identity and religious identity. Researching Donor Behaviour: Ethical and legal requirements. Primary and secondary research, source of secondary data, primary data collection methods. Qualitative versus quantitative research. Use of focus groups, interviews, projective techniques and experiments. Postal, telephone and electronic surveys. Advantages, disadvantages and costs of each. Sampling. Interpreting donor research data.

By the end of this unit participants should be able to:

- Describe the demographic, attitudinal and lifestyle characteristics of donors.
- Explain the role of tax relief in stimulating donations and the operation of Gift Aid.
- Describe why donors support charities, emphasising the different categories of utility that can accrue from giving.
- Distinguish between content and process models of giving and explain how each may be used to inform fundraising activity.
- Describe the barriers to giving and how fundraisers can overcome them.
- Describe the reasons that donors terminate their support and design programmes to boost retention.
- Specify market research objectives.
- Commission both qualitative and quantitative research, as appropriate for a given research project.
- Understand the contribution of donor insight to fundraising decision making.

Course Syllabus

Unit 3: Designing Donor Communications

Communication Theory:

Linear model of communication. Network theory. Influences on the communications process. Role of opinion leaders and followers. Process of adoption, process of diffusion. Interaction and interactivity in communication.

Relational Approaches to Communication:

Relationship fundraising versus transactional fundraising. The value concept, principles of retention. Key relationship concepts. Social exchange theory. Social penetration theory.

Understanding How Donors Process

Information:

Perception, perceptual selection, perceptual interpretation. Learning, behavioural learning, cognitive learning, interference theory, cognitive response. Attitudes, attitude components, intentions, compensatory models, cognitive component, affective component, conative component. Environmental influences on donor information processing; culture, sub-culture, purchase situation, communications situation.

Creative Approaches:

Message source, source credibility, message framing, message balance, message structure, message appeal. Role of emotions and feelings based appeals. Differences In high/low involvement contexts.

Case for Support:

Development of a case for support, case statements and case expressions – connections and inter relationships between these. Case Expressions - use of Four Pillars exercise. Role of storytelling.

Communication Cycles and Supporter

Journeys:

Post-hoc segmentation techniques, using donor data to plan appropriate supporter journeys, development of supporter care programs and standards.

Role of Design in Fundraising

Communications:

Including the role of typeface, colour, design and layout and the principles underpinning. Simple copywriting. Donor centricity.

By the end of this unit participants should be able to:

- Describe a linear model of communication and more recent explanations of how communications are felt to work including network theory.
- Explain how donors process fundraising appeals.
- Distinguish between relational and transactional approaches to communications.

Continued Overleaf...

- Describe key theoretical concepts underpinning a relational approach to fundraising.
- Outline ways in which fundraising relationships can potentially be developed.
- Consider how fundraising messages might best be presented.
- Utilise key emotions and feelings in the design of fundraising communications.
- Plan supporter journeys for a range of different categories of donor.
- Write an appropriate case for support and case expression, using an understanding of both organisational and donor needs/requirements.
- Critically evaluate donor communications against a wide range of criteria.

Course Syllabus

Unit 4: Fundraising Planning

Fundraising Planning:

Benefits and drawbacks of planning, approaches to planning, alternatives to planning, planning for different forms of fundraising and structure(s) for a fundraising plan.

Coordination and planning with other departments (as appropriate).

Where Do We Want To Be:

Fundraising objectives: importance of SMART objectives, objective setting, categories of fundraising objective: unrestricted versus restricted gifts, pledge versus cash, cash versus monthly giving, acquisition versus retention. Sector benchmarks for the performance of various forms of fundraising.

How Will We Get There:

Fundraising Strategy: Overall direction. Segmentation: a priori approaches, demographic, geodemographic and lifestyle segmentation, post hoc approaches, behavioural segmentation, value segmentation, RFM, RFV and FRAC. Positioning: value proposition, sources of distinctiveness. Branding: why brand?, models of brand, brand personality, links with fundraising performance. Case for support and case expressions.

The Fundraising Mix:

Direct response fundraising, major gift fundraising, legacy fundraising, corporate fundraising (including employee giving and matched gifts), community fundraising, fundraising events and grantwriting. Best practices in relation to the practice of each form of fundraising. Typical returns and timescales associated with each.

Developing a Fundraising Budget:

Methods of budget setting, categories of costs, accounting for risk. Scheduling – use of Gantt charts.

Monitoring/Evaluation:

Importance of fundraising metrics, interpretation and use of key metrics including response rate, average gift level, return on investment, lifetime return on investment, lifetime value. Contingency planning. Cost/income ratios and public reporting of fundraising activity.

By the end of this unit participants should be able to:

- Explain the role of the fundraising plan within the context of the organisation.
- Develop SMART fundraising objectives.
- Develop fundraising strategies and tactics appropriate to the internal and external environment.
- Set and justify a budget for a fundraising plan.
- Set and justify a schedule for a fundraising plan.
- Define and use appropriate measurements to evaluate the effectiveness of fundraising plans and activities.
- Understand major differences in planning for different categories of activity/campaign.
- Select an appropriate framework for the presentation of a given plan.

Course Assessment

Assignment 1: The Fundraising Environment

Course Assessment

There are four assignments that must be successfully completed for the award of the certificate. The details of each are provided here:

Assignment 1: The Fundraising Environment

You are required to conduct a fundraising audit for a not for profit organisation. This might be your employer, or it might be an organisation with which you are familiar. The exact focus of your assignment would normally be the aspects of fundraising that you are most directly involved with. You might thus look at community fundraising, direct marketing, e-fundraising, corporate fundraising or grant fundraising.

Specifically, you are required to:

- Provide a brief 100 word description of the fundraising activity that will form the basis of your assignment.
- Provide a STEEPLE analysis detailing the macro environmental factors impacting on your selected area of fundraising.
- Provide a competitor analysis and (if appropriate) a collaborative analysis.
- Provide an analysis of the market environment for your selected area of fundraising.
- Provide an internal analysis of your own organisation's past/current fundraising activities and capabilities.
- Provide a detailed SWOT analysis.

You should ensure that you reference all the sources that you use to compile your audit. The Vancouver system of referencing is probably the most appropriate for management reports, but you may use Harvard or any other standard convention if you prefer. Just be sure to apply your selected convention consistently. If you are unsure of how to reference, you should follow the format adopted in the textbook. You can find plenty of examples there of how to reference various kinds of sources. Referencing is not included in the word count.

The grade for this assignment will be calculated as follows:

Criteria	% of Grade
Description of Fundraising Activity	5%
STEEPLE Analysis	15%
Competitor/Collaborative Analysis	20%
Market Analysis	20%
Internal Analysis	20%
SWOT Analysis	10%
Referencing/Presentation	10%
TOTAL	100%

For word count, please see overleaf...

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.

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.

Word Count for Assignment 1

The overall word limit for this assignment is **3000 words**.

Students are permitted to submit assignments with a word count 10% above the word limit, without penalty.

While guidelines for word counts should be followed wherever possible, there is no minimum word limit for this assignment.

NB Footnotes and tables are included in the word count and must not be in image format.

Excessive Word Counts Assignments that are judged by the tutor to be excessively lengthy in relation to the complexity of your chosen subject matter will be returned for resubmission.

Resubmissions of this type must be received within 5 working days of notification by the Institute. Please note in the case of a resubmission the score would be capped at 50%.

Distinction Grade Assignments

To achieve a Distinction Grade, work will demonstrate all of the following characteristics:

- These papers will stand out as having been exceptionally well completed both in terms of structure and content.
- A wide variety of external sources of information will have been consulted and all will have been correctly referenced.
- These papers will be very consistent in terms of the quality of their critique and evaluation of the external and internal environment.
- These papers will demonstrate a very high degree of analysis and reflection.
- These papers will draw on a wider range of theoretical concepts and frameworks to inform the practical analysis than the merit grade paper, although not in such a way that the focus becomes confused.

Merit Grade Assignments

To achieve a Merit Grade, assignments will demonstrate all of the following qualities:

- These papers will largely follow a recognised structure and use appropriate terminology.
- These papers will demonstrate a good level of ability to undertake an analysis of fundraising problems/scenarios.
- There will be evidence that the student is able to apply the most appropriate course models and frameworks to inform their analysis of the case.
- These papers will indicate that the student understands what is required to produce a fundraising audit. They should be able to recognise aspects of an organisation's position within the fundraising environment and draw logical conclusions from the information analysed.

Pass Grade Assignments

The following criteria when largely present will indicate an acceptable level of competence:

- These papers will generally follow an appropriate structure and use appropriate terminology.
- These papers will demonstrate some limited ability to undertake an analysis of fundraising problems/scenarios.
- There will be evidence that the student is able to apply some course models and frameworks to inform their analysis of the case. At this grade, they will not always be well applied to the case.
- These papers will indicate that the student understands what is required to produce a fundraising audit. They should be able to recognise some aspects of an organisation's position within the fundraising environment and draw a limited set of conclusions from the information. These will not be as insightful as those required for a higher grade.

Fail Grade Assignments

The following factors will constitute failure when largely evident:

- Papers that lack the structure, content and use of appropriate terminology that would be expected from a student able to conduct a disciplined analysis of fundraising problems, scenarios or issues will fail.
- Students who are unable to develop a critical evaluation of the organisation will also fail.
- Candidates who are unable to utilise course concepts, frameworks and models to inform their analysis will fail. Fail grade candidates will be unable to offer more than a simple description of these ideas, rather than moving beyond this to employing these tools to inform their approach to the task.

Resubmissions

Students are permitted two attempts at each assignment:

- 1) the original submission
- 2) one resubmission for assignments graded below 50%

Please note in the case of a resubmission the score would be capped at 50%.

Course Assessment

Assignment 2: Understanding Donor Behaviour

Reflecting on your fundraising audit findings, you are required to identify gaps in your knowledge that (if filled) would help you to build or refine your case for support.

Examples might include:

- Understanding donor motivation or interests.
- Understanding donor communication preferences; content, channels, etc.
- Understanding how donors might react to a fundraising innovation.
- Identifying the size and attractiveness of a particular donor segment or market.
- Understanding key market trends.
- Understanding the performance of your organisation's previous fundraising approaches.

Your selected gap should require research to meet your information requirements. The data should not be obtainable from secondary sources.

In this assignment you are required to provide a written justification to your line manager, making the business case for why your organisation should invest in the proposed primary research.

To achieve a good grade in this task you should demonstrate a clear understanding of the impact that research can make in informing decision making.

You should also demonstrate an understanding of the costs and benefits of various forms of research and thus the value they can deliver for a given level of expenditure.

You should make it clear why the expenditure you propose would offer value for your organisation and how the data could be used to develop or adapt your case for support.

Your business case should include the following components:

- Background and Introduction – here you should explain the key information gap that you are trying to fill and which elements will be researched through primary and secondary research.
- Research Objectives – clear research objectives should be stated and you should demonstrate how they derive from the audit findings and wider fundraising needs.
- Research Specification and Justification - you should explain your proposed methodology, specify what data will be acquired during the research process, and demonstrate how the research findings will be used to assist your fundraising activity. You should justify your choices by showing how the information gained will help you to create (or adapt) a case for support.
- Timeline – you should indicate over what timeframe the research will be conducted.
- Budget – you should provide a detailed budget for your proposed research activities and justify the cost effectiveness of your plan.

Your overall grade for this assignment will be calculated as follows:

Criteria	% of Grade
Background and Information	10%
Research Objectives	20%
Research Specification and Justification	50%
Timeline	10%
Budget	10%
TOTAL	100%

Word Count for Assignment 2

The overall word limit for this assignment is 1500 words. Students are permitted to submit assignments with a word count 10% above the word limit, without penalty.

While guidelines for word counts should be followed wherever possible, there is no minimum word limit for this assignment.

NB Footnotes and tables are included in the word count and must not be in image format.

Excessive Word Counts

Assignments that are judged by the tutor to be excessively lengthy in relation to the complexity of your chosen subject matter will be returned for resubmission.

Resubmissions of this type must be received within 5 working days of notification by the Institute. Please note in the case of a resubmission the score would be capped at 50%.

Distinction Grade Assignments

To achieve a Distinction Grade, work will display ALL of the following characteristics:

- These papers will stand out as having been exceptionally well completed both in terms of structure and content – as well as balancing the practical and theoretical aspects. Recommendations will be soundly based on course content and will be able to be implemented in practice.
- An original research topic will be selected and clear actionable objectives presented.
- These papers will identify the best available methodology to supply their information needs.
- These papers will provide a realistic budget and timeline.

Merit Grade Assignments

To achieve a Merit Grade, work will display the following qualities:

- These papers will largely follow a recognised structure and use appropriate terminology.
- An appropriate research topic will be selected and generally actionable objectives will be presented.
- These papers identify an appropriate methodology to supply their information needs.
- These papers will provide a largely realistic budget and timeline.

Pass Grade Assignments

The following criteria, when present overall, will indicate an acceptable level of competence:

- These papers will largely follow a recognised structure and use appropriate terminology.
- A research topic will be selected and some actionable objectives will be presented.
- These papers identify an appropriate methodology to supply some aspects of their information needs.
- These papers will provide a budget and timeline with some realistic components.

Fail Grade Assignments

The following factors will constitute failure when largely evident:

- They lack the structure, content and use of appropriate terminology that would be expected from a student able to generate a marketing research brief.
- An inappropriate research topic is selected and/or the research objectives are not actionable.
- The paper describes an inappropriate methodology to supply the stated information needs.
- The budget and/or timeline are not realistic.

Resubmissions

Students are permitted two attempts at each assignment:

- 1) the original submission
- 2) one resubmission for assignments graded below 50%

Please note in the case of a resubmission the score would be capped at 50%.

Course Assessment

Assignment 3: Communication Critique

You are required to identify one piece of fundraising communication recently generated by your organisation. It could be a mail pack, newsletter or fundraising brochure. You must select a communication where the goal is either to raise money, or steward the relationship with a given segment of donors.

Reflecting on what you have learned during units 2 and 3 you must then conduct a critical analysis of your selected communication, evaluating both its design and content.

You will be expected to demonstrate an understanding of donor behaviour, how to articulate a case for support and the principles of communication, print, design and layout.

For this assignment you will need to:

- Provide a brief introduction outlining the context for the communication, the donors it was intended to target, the purpose of the communication and where it fits within the overall communications cycle for that segment.
- Critically evaluate your selected communication using relevant course ideas and concepts.
- In the light of your analysis recommend changes that the organisation can implement in the future to improve the quality of the communication. You must ensure that any recommendations you offer are fully compliant with any legal or ethical obligations.

The grade for this assignment will be calculated as follows:

Criteria Introduction/	% of Grade
Context	20%
Critical Evaluation	50%
Conclusions and Recommendations	20%
Presentation (including appropriate referencing)	10%
TOTAL	100%

To achieve a good grade in this assignment you should demonstrate a clear understanding of course theories, ideas and frameworks and employ them (where appropriate) in your analysis. You should pay particular attention to the core material presented in the lectures and textbook, but for a distinction grade you should also demonstrate wider reading.

A copy of your selected communication **MUST** be included – a separate attachment is permissible.

Word Count for Assignment 3

The overall word limit for this assignment is **1,500 words**.

Students are permitted to submit assignments with a word count 10% above the word limit, without penalty.

While guidelines for word counts should be followed wherever possible, there is no minimum word limit for this assignment.

NB Footnotes and tables are included in the word count and must not be in image format.

Excessive Word Counts

Assignments that are judged by the tutor to be excessively lengthy in relation to the complexity of your chosen subject matter will be returned for resubmission.

Resubmissions of this type must be received within 5 working days of notification by the Institute. Please note in the case of a resubmission the score would be capped at 50%.

Distinction Grade Assignments

To achieve a distinction grade, work will display ALL of the following criteria characteristics:

- These papers will stand out as having been exceptionally well completed both in terms of structure and content.
- A wide variety of external sources of information will have been consulted and all will have been correctly referenced.
- These papers will be very consistent in terms of the quality of their critique and evaluation of the communication.
- These papers will demonstrate a very high degree of analysis and reflection.
- These papers will draw on a wider range of theoretical concepts and frameworks to inform the practical analysis than the merit grade paper, although not in such a way that focus becomes confused.

Merit Grade Assignments

To achieve a Merit Grade, work will display the following qualities:

- These papers will largely follow a recognised structure and use appropriate terminology.
- These papers will demonstrate a good level of ability to undertake an analysis of fundraising communications.
- There will be evidence that the student is able to apply the most appropriate course models and frameworks to inform their analysis of formal communication.
- These papers will indicate that the student understands what is required to produce an effective donor communication.

Pass Grade Assignments

The following criteria when present overall will indicate an acceptable level of competence:

- These papers will generally follow an appropriate structure and use appropriate terminology.
- These papers will demonstrate some limited ability to undertake an analysis of fundraising communication.
- There will be evidence that the student is able to apply some course models and frameworks to inform their analysis of the focal communication. At this grade they will not always be well applied.

Fail Grade Assignments

The following factors will constitute failure when largely evident:

- They lack the structure, content and use of appropriate terminology that would be expected from a student able to conduct a disciplined analysis of fundraising communication.
- Students who are unable to develop a critical evaluation of the organisation will also fail.
- Candidates who are unable to utilise course concepts, frameworks and models to inform their analysis will fail. Fail grade candidates will be unable to offer more than a simple description of these ideas, rather than moving beyond this to employing these tools to inform their approach to the task.

Resubmissions

Students are permitted two attempts at each assignment:

- 1) the original submission
- 2) one resubmission for assignments graded below 50%

Please note in the case of a resubmission the score would be capped at 50%.

Course Assessment **Assignment 4:**

Fundraising Plan

You are required to produce a fundraising plan for a nonprofit or charitable organisation of your choice.

It is possible to submit a plan for an organisation's fundraising as a whole, but we would strongly advise you to focus solely on a specific form of fundraising or securing funding for a particular project or service. This will make the assignment much more manageable given the deadline and word count.

Your fundraising plan should be written in order to be read and approved by a senior member of the management team. It is thus a practical document that should utilise the theory you will learn during the course to inform the analysis you undertake. While this is a practical document you must still reference any course material or ideas that you use in your plan.

This assignment must build on the work you completed in Assignment 1, where you completed a fundraising audit. You are required to reproduce that in the plan (see below) – but you do NOT need to revisit it in the light of feedback received. It is enough to merely reproduce it in the relevant section. However, your plan must take account of the findings of that audit and represent an effective and cogent response.

The following headings may be useful in guiding the structure of your assignment – and further advice will be provided throughout the course.

- Cover Page – to include title, time period addressed in the plan, author, name of organisation/product and, if appropriate, any confidentiality restrictions.
- Executive Summary – one page summary of the main issues in the fundraising plan.
- Table of Contents – detail of key sections and sub-sections.
- Fundraising Audit.
- SWOT Analysis.
- Assumptions.
- Fundraising Objectives.
- Fundraising Strategies.
- Tactics.
- Budget.
- Schedule.
- Responsibilities (if applicable).
- Monitoring/Control.
- Contingencies.
- Appendices.

Your approach throughout should reflect the highest standards of professional practice and be compliant with the Code of Fundraising Practice.

The grade for this assignment will be calculated as follows:

Criteria	% of Grade
Fundraising Objectives	15%
Fundraising Strategy	25%
Fundraising Tactics (or action plan)	30%
Budget and Schedule	10%
Monitoring/Controls	10%
Quality of presentation (including referencing)	10%
TOTAL	100%

Word Count for Assignment 4

The length of this assignment will vary depending on its focus. The assignment (excluding the audit) should be no longer than 5,000 words. In many cases it may be substantively shorter.

Students are permitted to submit assignments with a word count 10% above the word limit, without penalty. While guidelines for word counts should be followed wherever possible, there is no minimum word limit for this assignment.

NB Footnotes and tables are included in the word count and must not be in image format.

Excessive Word Counts Assignments that are judged by the tutor to be excessively lengthy in relation to the complexity of your chosen subject matter will be returned for resubmission.

Resubmissions of this type must be received within 5 working days of notification by the Institute. Please note in the case of a resubmission the score would be capped at 50%.

Distinction Grade Assignments

To achieve a distinction grade, work will display ALL of the following criteria characteristics:

- These papers will stand out as having been exceptionally well completed both in terms of structure and content – as well as balancing the practical and theoretical aspects. Strategic and tactical recommendations will be soundly based in theory and will be capable of implementation.
- These papers will be very consistent in terms of the critique and evaluation of the environmental internal environment and how this informs the subsequent recommendations.
- Indeed, these papers will demonstrate a strong fit between the factors identified as impinging on the organisation and the response proposed.
- These papers will draw on a wider range of theoretical concepts and frameworks to inform the practical analysis than the merit grade paper, although not in such a way that the focus becomes confused.

Merit Grade Assignments

To achieve a Merit Grade, work will display the following qualities:

- These papers will largely follow a recognised structure and use appropriate terminology.
- These papers will demonstrate some ability to undertake an analysis of fundraising problems scenarios and to develop a cogent response.
- There will be some evidence that the student is able to apply appropriate course models and frameworks to inform their analysis of the case and subsequent recommendations.
- These papers will indicate that the student understands what is required to produce a fundraising plan and in so doing employing a range of strategic and tactical options. They should be able to recognise aspects of an organisation's position within the fundraising environment; draw logical conclusions from the information analysed and make clear a number of logical and practical recommendations.

Pass Grade Assignments

The following criteria when present overall will indicate an acceptable level of competence:

- These papers will generally follow an appropriate structure and use appropriate terminology.
- These papers will demonstrate some limited ability to undertake an analysis of fundraising problems scenarios and to develop a response.
- There will be evidence that the student is able to apply some course models and frameworks to inform their analysis of the case and subsequent recommendations. At this grade, they will not always be well applied to the case.
- These papers will indicate that the student understands what is required to produce a fundraising plan. They should be able to recognise some aspects of an organisation's position within the fundraising environment; draw a limited set of conclusions from the information analysed and make a limited set of recommendations. These will not be as practical as those required for a higher grade.

Fail Grade Assignments

The following factors will constitute failure when largely evident:

- Papers that lack the structure, content and use of appropriate terminology that would be expected from a student able to conduct a disciplined analysis of fundraising problems, scenarios or issues will fail.
- Students who are unable to develop a critical evaluation of the organisation and generate a series of appropriate recommendations will also fail.
- Candidates who are unable to utilise course concepts, frameworks and models to inform either their analysis or subsequent recommendations will fail. Fail grade candidates will be unable to offer more than a simple description of these ideas, rather than moving beyond this to employing these tools to inform their approach to the task
- Fail grade papers may also be inconsistent in their approach – in so far as the recommendations offered appear unrelated to the issues raised in the fundraising audit.

Resubmissions

Students are permitted two attempts at each assignment:

- 1) the original submission
- 2) one resubmission for assignments graded below 50%

Please note in the case of a resubmission the score would be capped at 50%.

Further Guidance

How your Assignments will be Assessed

Assessors are looking for:

UNDERSTANDING i.e. do you show that you understand the concept of the course? Do you use the terms appropriately? Do you show understanding of what is duly involved in developing approaches and procedures?

APPLICATION i.e. Can you make appropriate use of a concept or technique within a work/organisational setting, can you 'ground' these theories in actual, real working practice?

APPRAISAL i.e. Can you assess critically and objectively, the tools and techniques contained in the course in relation to their appropriateness within the context of your own organisation?

To achieve a Distinction Grade, work will demonstrate all of the following qualities:

- Extensive, in depth and accurate knowledge of the topic.
- Clarity of argument and logical expression.
- Integration of a range of materials.
- Evidence of extensive reading.
- Creative insight into issues presented.
- Knowledge of leading edge research

- Synthesises and applies theories appropriately.
- Analytical and evaluative in tone and content.
- Coherent structure.
- Very fluent writing style.
- Exemplary referencing.

Merit Grade Assignments will demonstrate all of the following qualities:

- Accurate and well-informed knowledge of the topic.
- Some insights about theoretical and/or practical issues.
- Breadth of reading in relevant literature.
- Grasp of key principles and relevant theories.
- Grasp of how to interpret research.
- Fairly well structured and organised.
- Accurate referencing.
- Largely fluent writing style.

The following criteria when largely present will indicate an acceptable level of competence to achieve a Pass Grade:

- Some limited knowledge of the topic.
- Generally accurate, but with some omissions and errors.
- Occasional evidence of relevant reading.
- Minimal amounts of theoretical, analytical and critical content.
- Reasonably coherent and structured presentation.
- Minimal fluency.
- Some aspects of the question addressed.
- Some attempt at referencing accurately.

The following factors will constitute failure when largely evident:

- Neither answers nor addresses the question.
- Descriptive in tone and inconsistent throughout.
- Lacks relevant knowledge.
- Contains important inaccuracies.
- Coverage of theoretical/research material sparse.
- Contains unsupported assertions and value judgements.
- Illogical and incoherent arguments.
- Badly organised and lacks structure.
- Unfinished.
- Meaning unclear and lacks fluency.
- Lack of referencing and/or inaccurate referencing.

Marking turnaround times

Generally, grades are available online approximately 3 weeks after the submission deadline, but tutors can't always guarantee a 3 week turnaround. In some circumstances this marking period may be a little longer, and where extensions have been granted, or an assignment needs to be resubmitted, marking times will be considerably longer. Please do not delay working on your remaining assignments.

Diagrams, Tables etc.

Diagrams, figures, tables etc. are not essential in the assignments although their use is strongly encouraged. Not only do diagrams save words, they often provide a new slant on a familiar situation. The ability to understand and make use of, diagrams is a also a valuable asset to many managers.

Structure and Presentation of Management Reports

The development of skills in communication and report writing is vital in these assignments because so much of the course material is actually concerned with communication in all its forms. Producing clear, concise and convincing management reports is an important strand of the learning on the course, and so the form/ structure and presentation of the management reports will be taken into account by assessors.

Understanding and 'Grounding' Course Concepts

All the assignments require you to apply course concepts to your own experience and situation. This means that, in every case, answers which make little or no use of course concepts which present course concepts without 'grounding' in your own circumstances are unacceptable.

Ratification of Overall Grade

All assignment grades are provisional until the exam board have ratified overall grades at the annual exam board meeting held in January.

Resubmissions

If an assignment is graded below 50% students will have 3 months from the return date to resubmit.

Students are permitted 2 attempts at each assignment:

- 1) the original submission
- 2) one resubmission for assignments graded below 50%

Please note in the case of a resubmission the score would be capped at 50%.

Your final grade for the Certificate will be calculated as follows:

Assessment	% of Overall Grade
Assignment 1	30%
Assignment 2	20%
Assignment 3	20%
Assignment 4	30%
TOTAL	100%

Word counts

Details of the assignment requirements can be found in this Course Handbook and online, 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.

Assignment	Word count
1	3000
2	1500
3	1500
4	5000

Students are permitted to submit assignments with a word count 10% above the word limit, without penalty.

While guidelines for word counts should be followed wherever possible, there is no minimum word limit for this assignment.

The following is not included in your word count:

- title/contents page
- references/bibliography
- relevant appendices (the inclusion of lengthy appendices may affect the presentation grade if they are not considered relevant)

NB Footnotes and tables are included in the word count and must not be in image format.

Assignments that are judged by the tutor to be excessively lengthy in relation to the complexity of your chosen subject matter will be returned for resubmission.

Further Guidance

Procedures for Assessments and How to Submit

Assignment Deadlines

Assignment deadlines are published on the website on your course booking page and included in your course joining instructions. Please note candidates' assignments must be received by midnight on the due date.

How to Submit Assignments

Please always refer to the guidelines below to make sure you do not get penalised for submitting an assignment in the wrong format.

All assignments must be submitted via the online learning platform in the relevant section. Assignments submitted via email WILL NOT be accepted under any circumstances.

- All assignments must be submitted via the online learning platform by 11:59pm on the deadline date. You will receive an automatic confirmation email to acknowledge receipt of your assignment.
- As we employ anonymous marking, please save your assignment document in the following format (please ensure this reference is also included in any communications with the academy team):

<CANDIDATE NUMBER_COURSE
TITLE _LOCATION_YEAR YOU
STARTED COURSE_ ASSIGNMENT
NUMBER>

For example:

'80445_IDPE_CiF_LONDON_2020_A1'

Please ensure that your name is NOT in any part of your assignment document.

- Only one file per assignment should be submitted in either doc docx pdf. Please make every effort to reduce the size of your document and ensure that it is less than 4MB.
- Candidates should include their assignment word count on the first page of their assignment document.

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 may be subject to a deduction of 5% from the mark awarded for every day that the work is late, including Bank 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 resources in your online Study Skills folder which includes some guidance on successful time management.

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 on request from **academy@institute-of-fundraising.org.uk**) which will be considered by the Academy Team.

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 or exam.

- 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 the below steps.

Step one: Complete the 'Assignment Extension Request Form' obtained from **academy@institute-of-fundraising.org.uk**

Step two: Submit the completed assignment extension request form to the IoF together with a medical certificate or other appropriate supporting documentation.

The IoF will give you a prompt decision on any application for extension by email and your record will be updated accordingly.

Extensions should be requested through the IoF Academy rather than through your course tutor.

Further Guidance

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 student must not use external assistance on any “in-class” or “take-home” assessment, unless the tutor has specifically authorised this assistance.
- A student must not use another person as a substitute in the taking of an examination or other form of assessment.
- 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.
- 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:

- Quotes another person’s actual words, either oral or written;
- Paraphrases another person’s words, either oral or written;
- Uses another person’s idea, opinion, or theory.

Further Guidance

General Guidance and CloF Appeals Procedure

Those candidates achieving a score of 70% or more will be deemed to have passed with distinction.

Those candidates achieving a grade between 60% and 69% will be deemed to have passed with merit.

Those candidates achieving a score of between 50% and 59% will be deemed to have passed.

Resubmissions

If an assignment is graded below 50% students will have 3 months from the return date to resubmit.

Students are permitted two attempts at each assignment:

- 1) the original submission
- 2) one resubmission for assignments graded below 50%

Please note in the case of a resubmission the score would be capped at 50%.

Further extensions of time will be considered on a case by case basis by CIOF. All assessment materials must, however, be submitted within one calendar year of the start date of the course. Candidates who fail to meet this requirement will be deemed to have failed.

CIOF Appeals Procedure

The Chartered Institute of Fundraising (CIOF) is committed to providing an accessible and fair assessment process for all candidates undertaking CIOF qualifications.

If you are unhappy with an assessment outcome, please follow the guidelines below.

Informal Procedure

Step 1: In the first instance, please refer to the course handbook which highlights how your assignment was marked. Please ensure that you have read the feedback from the marking tutor before taking any further action.

Step 2: Ask for clarification. After reviewing the guidelines and information in the Course Handbook, it is possible to contact your tutor for clarification if:

- You have further questions on specific/ personal assignment feedback, which could not be answered by the guidance in the Course Handbook.
- You think there has been a numerical error in calculating your grade/s. Please keep in mind, your tutor will only be able to give you clarification regarding your personal feedback only. Your tutor will not be able to change your grade but will be able to support you while you contact the CIOF Academy Central Team
- You think that there have been some issues, misunderstandings or difficulties throughout the delivery of the module that have impacted on the grading of the assignment

If the issue is not reconciled, please continue to Step 3.

Formal Procedure: Stage 1

Step 3: Contact the CIOF Academy Central Team. If steps 1 and 2 fail to achieve a satisfactory outcome, it is possible to discuss the issue with the Central Team to explore ways to progress. To consult with the Academy Central Team please provide the following details:

- The course you are on, the assignment title, the issues with assignment outcome/grading you have experienced, the grounds for making an appeal and the results of the discussion with your tutor.

The Academy Central Team will agree a way forward with you if possible and will support you, the Tutor and/or others to come to a reconciliation. This stage is one that is flexible in process and actions to ensure that every effort is made for a successful outcome.

Formal procedure: Stage 2

Step 4: Submit a formal appeal. If you feel you have cause to appeal an assessment decision, you have 5 working days from the completion date of Stage 1 of the Formal Procedure. In exceptional circumstances and only in conjunction with the Academy Central Team you may be able to move this stage without completing the Formal Procedure: Stage 1 (Step 3).

The appeal must be made in writing to: **academy@ciof.org.uk** and addressed to a senior representative of the Professional Development team e.g. the Head of Department.

The appeal can only be made in connection to one of the following three areas:

- You have concerns about specific assignment feedback, which has

- not been answered or reconciled through the previous three steps outlined above
- You think there has been a numerical error in calculating your grade which has not been answered or reconciled through the previous three steps outlined above
- You think that there have been some issues, misunderstandings or difficulties throughout the delivery of the module that have impacted on the grading of the assignment which has not been answered or reconciled through the previous three steps outlined above

The Appeal will be investigated, and a Panel will be organised to hear the Appeal. The Panel will take place within 20 working days of the submission date of the Appeal and will be heard by a panel of at least two from the list below

1. A Senior member of the Professional Development team
2. An External Agency representative
3. The External Examiner
4. Assessment and Curriculum Quality Lead

In some circumstances you may be invited to be present during the panel. This may occur when your personal information is essential or when your actions are central to the appeal for example plagiarism.

The Appeal Board will notify you of the outcome of your appeal within 5 working days from the date of the Appeal Panel Meeting.

The decision of the Appeal Board is final.

Further Guidance

Complaints

The Institute of Fundraising defines a complaint as:

“an expression of dissatisfaction either about the qualification courses, facilities or services provided by the Institute of Fundraising or about actions or lack of actions by the 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 Institute of Fundraising believes that, if possible, complaints should be resolved through informal discussions. Our experience is that the vast majority of complaints are resolved at this stage.

Complaints should be addressed to a Senior Representative of the Professional Development team and emailed to academy@ciof.org.uk

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 the Institute of Fundraising

If you cannot resolve your complaint add ‘Formal Complaint’ to the subject line.

Please ensure you provide all information required to carefully review your complaint. Please 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.

Your complaint will be assigned to a senior member of the Professional Development team. The assigned member of staff will then contact you and endeavour to resolve your complaint.

If you feel that your complaint was not dealt with in a satisfactory manner, please refer to the CIOF Complaints Policy online: <https://ciof.org.uk/complaints>

Frequently Asked Questions

IoF English Language Requirements

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

Clearer Guidance for non-UK nationals

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.

Disability

If you have any requests regarding disability requirements, please contact the Academy team on academy@ciof.org.uk

How long do I have to complete my qualification?

Students are required to complete their chosen qualification within 12 months. Please review the full terms and condition at the below link before booking:

<https://ciof.org.uk/terms>

Some pre-course work is required to ensure students are fully prepared for the first training session. You will receive an email with login details for our dedicated e-learning platform about a week before the course starts which you will be using to access the required materials and support for your course.

Do I need to do anything before my course starts?

Yes, it is essential you have identified from the outset that this is the right qualification for you by reviewing the individual booking links and the course handbook. It will give you a good overview of the work based assessments and time commitment required.

What is expected of me?

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 the assignments.

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

On average our students report spending around 6-8 hours each week (or 400 hours in total) on their studies. Quite a lot of that time will be spent reading, thinking, and otherwise preparing for assignments. Remember, you do not have to work seven days a week. The exact time you need for your studies will depend on your own background and experience, and your knowledge of the unit subject. Some assignments have heavier workloads than others, and the workload can vary from week to week. Also, the assignments will undoubtedly help you in delivering your fundraising and engagement programmes.

What happens if I miss a training day?

You are expected to attend every session, every day; failure to attend any of the virtual training 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 Academy team by emailing academy@ciof.org.uk as soon as possible.

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.

Students will not be allowed to attend missed sessions on a different qualification.

What are the timings for the Tutorial and teaching sessions?

Teaching: 9:30-12:30

Tutorials: 15:00-17:00

Please log in promptly to ensure the course can begin on time

What support can I expect?

As you will be working towards a professional qualification there is a strong emphasis on independent learning. All our course tutors have expert knowledge of their field and relevant teaching experience, so you are sure to get professional advice and support throughout your course. 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!

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 get in touch with your tutor.

If you do need further advice please email academy@ciof.org.uk and we will endeavour to assist you.

What platform will the sessions be delivered on?

This qualification is being delivered via the online platform Zoom.

To enable you to interact with your tutor and your class you will need to have access to a microphone (or access to a landline phone) and ideally have a working video link via a camera.

To test compatibility with your system, you can join a test meeting via this link:

<https://zoom.us/test>

Please note: the live teaching sessions will be recorded to enable you and your cohort to revisit the teaching throughout the duration of your qualification.

Please find our privacy policy on page 39.

Who are my tutors?

Students have access to their tutors for support throughout the year. Tutor/s' details are available on the online learning platform and in your joining instructions.

How long will the qualification take to complete?

Approximately 9-12 months.

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

Please adhere to assignment deadlines – these are critically important! You will be expected to manage your own time in order to meet these deadlines. If, due to unforeseen circumstances, you are unable to do this, you must notify the IoF academy team by emailing All formal extension requests should be directed to the IoF Academy, not your tutors; further detail regarding the assignments and extension requirements can be found in the Course Handbook.

You need to complete and pass all the assessments to be awarded the qualification. If you are encountering problems in managing your workload make use of the IoF's 'Study Skills' guides in the resources area to improve your time management skills.

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

Full details of the assignment requirements can be found on p.25 and at the end of each assignment section in this Course Handbook.

Word counts can also be found online. 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.

Students are permitted to submit assignments with a word count 10% above the word limit, without penalty.

While guidelines for wordcounts should be followed wherever possible, there is no minimum word limit for the assignments.

- title/contents page
- references/bibliography
- relevant appendices (the inclusion of lengthy appendices may affect the presentation grade if they are not considered relevant)

NB Footnotes and tables are included in the word count and must not be in image format.

Assignments that are judged by the tutor to be excessively lengthy in relation to the complexity of your chosen subject matter will be returned for resubmission.

Resubmissions of this type must be received within 5 working days of the notification by the Institute. Please note in the case of a resubmission the score would be capped at 50%.

I have not written an academic assignment before. What advice can you offer?

The style of writing you will be expected to use for academic work is likely to be different to other styles you use every day. It is part of your academic training to learn how to write in this more formal style - it demonstrates discipline and thoughtfulness. It's important to communicate your ideas clearly and be concise.

The resources in your online 'Study Skills' folder provide guidance to help you develop your academic writing, information on how to reference correctly and help with your time management.

When can I expect my results?

Generally, grades are available online approximately 3 weeks after the submission deadline, but tutors can't always guarantee a 3 week turnaround. In some circumstances this marking period may be a little longer, and where extensions have been granted, or an assignment needs to be resubmitted, marking times will be considerably longer. Please do not delay working on your remaining assignments.

Who do I contact if I need help?

If you require academic help, please contact your tutor.

In terms of hardware and software requirements, you need a PC with an Internet connection and a browser. To find out more about system requirements you can click onto 'Help' in the menu on the left. If you require further technical help or if you would like to speak to a member of the Academy team (academy@ciof.org.uk).

If you need support in finding schools' development resources, please contact info@idpe.org.uk

When can I expect my final grade?

You can expect to receive your final assessment result and overall grade approximately 6-8 weeks after your last assignment submission deadline or open book exam, assuming you have successfully completed all previous assessments.

Privacy Notice

The IoF and IDPE qualification is a joint course run by the following data controllers:

The Institute of Fundraising (IoF) of Charter House, 13-15 Carteret Street, London SW1H 9DJ

The Institute of Development Professionals in Education (IDPE) of Kelston Park, Bath BA1 9AE

The IoF are working with Zoom (processor) to enable us to deliver webinars and online learning. To access the course, you will need to register with Zoom, giving your name and email address. This personal data will be collected by Zoom and stored under the US Privacy Shield outside of the EEA. Where Zoom detects that your IP address is coming from the UK or EU, you will be presented with a one-time privacy policy update for consent.

You will also be able to manage cookies preferences.

For more information on how Zoom use and protect your data see:

<https://support.zoom.us/hc/en-us/articles/360000126326-Official-Statement-EU-GDPRCompliance>

https://zoom.us/docs/doc/Zoom_GLOBAL_DPA_December_19.pdf

The IoF will use the information you provide to monitor delegate attendance and may contact you by email for feedback about the webinar/online learning.

When you sign up to an IoF qualification course, we use the information you provide to complete your booking/enrollment and to give you access to our secure online learning platform which is run by Blackboard this is in order for us to fulfill our contract with you for the course. Access is limited to Academy staff and qualification tutors.

All the information attached to your online record (including assignments, grades and online discussions) will be archived after the course expires (within 24 months or as soon as all students from your cohort have completed their studies) to maintain a record of proof of qualification/course enrollment. Otherwise the third party provider will hold your access information for as long as the online course is available or until you ask us to withdraw your access.

The IoF rely on legitimate interests to do the following:

We will keep archived courses and any personal data associated for six years for complaint/dispute resolution purposes. After this time we will keep your name, surname, membership/student number and name and date of qualification awarded for a maximum of 50 years to confirm your qualification awards and for fraud prevention purposes.

We also share your data with relevant third parties (like the exam board) for quality assurance purposes.

We will use some of the information you provide in order to process your payment. In addition, the IoF will also maintain a record of your course registration for the following purposes:

1. To help us review the popularity of our online courses and improve our services (this may include being sent an email with a link to a survey about the course)
2. For budgeting and financial review
3. For follow-up feedback

IDPE will use the information you provide for the following purposes:

1. To process your payment
2. To send you a welcome message and to communicate with you during the course

To view IoF's full privacy policy visit: <https://www.institute-of-fundraising.org.uk/privacy-policy/>

To view IDPE's full privacy policy visit: www.idpe.org.uk



Chartered Institute of Fundraising

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United Kingdom

Email: academy@ciof.org.uk

www.ciof.org.uk

**Institute of Development Professionals in
Education** Kelston Park

Bath
BA1 9AE

Telephone: 01225 829 030

Email: info@idpe.org.uk

Website: www.idpe.org.uk

The Chartered Institute of Fundraising is incorporated by Royal Charter (RC000910) and is a charity registered in England and Wales (No. 1188764) and Scotland (No. SC050060)

IDPE is a company limited by guarantee. Registered in England: Company Number 3761777. Registered Charity Number 1100927

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