



Chartered
Institute of
Fundraising



CERTIFICATE IN FUNDRAISING

Course handbook

WELCOME

We are delighted you have decided to study for a Chartered Institute of Fundraising and Institute of Professionals in Education qualification. This is the only qualification designed for those working in schools' development, and offers learners the chance to consolidate their existing fundraising skills and to learn new techniques, to adapt and evolve their schools fundraising strategy.

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

The following pages will give you an overview of the modules and assignments required to achieve the Certificate in Fundraising, and will also provide you with the key information you need to know when studying with us.

We wish you the best of luck with your learning and fundraising. Together with our members, we want to demonstrate the highest of standards and support schools to achieve fundraising success.

Louise Bennett, CEO

Institute of Development Professionals in Education

Katie Docherty, CEO

Chartered Institute of Fundraising



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Course structure

The Certificate in Fundraising qualification is designed to help you, as a fundraiser become more confident and understand how to make a genuine difference to their organisation's fundraising programme.

The course is structured in four modules each worth 30 credits. Each assignment must be completed and passed at 50% or higher to be awarded the 30 credits for the module. Details of the assignments for each module are provided in the relevant module section of this handbook.

120 credits must be gained to be awarded the Certificate in Fundraising and to be entitled to use the post nominals MCIOF(Cert).

The four modules are as follows:

The Fundraising Environment

In this first module of the certificate, you will examine how evidence-based strategic planning forms a core component in achieving sustainable fundraising growth for an organisation and how theory can be simply and effectively incorporated into daily fundraising practice. You will employ a range of theories to analyse external market factors influencing fundraising success, evaluate risks, and prioritise strategic opportunities to enhance organisational performance.

This module lays the foundation for your future learning, equipping you with essential skills that will be valuable throughout the course. It also facilitates the identification of real strategic opportunities that you can pursue in later

modules. Accordingly, you are expected to have completed the required prerequisite learning activities outlined in the course materials and have a solid understanding of the not-for-profit sector prior to the first session.

Fundraising Methods and Approaches

In the second module of the Certificate in Fundraising, you will explore structured approaches to evaluating an organisation's fundraising effectiveness, focusing on fundraising methods, income-mix, and alignment with operational objectives. You will assess philanthropic orientation and examine the ethical, sustainable, and inclusive nature of fundraising practices. This module will also explore the role of digital tools and A.I. in enhancing fundraising practices, before applying evaluative techniques to identify strategic priorities for optimising income streams.

Building on your Module 1 learning, you will combine your analysis of localised factors with broader market factors to present strategic priorities. As such, you are expected to have completed Assignment 1 and the required prerequisite learning activities outlined in the course materials for Module 2 prior to attending the first session.

Donor Motivation: Insights, Communications & Psychology

For the third module of the certificate, you will study the key drivers behind donor motivation and behaviour. It will provide insights that inform more effective communication strategies and support the

development of meaningful, long-term philanthropic relationships, which are more rewarding for the donor and enhance fundraising results. By exploring the psychological, cultural, ethical and behavioural factors that influence charitable giving, this module offers a critical examination of how individual and collective motivations can be used to shape more compelling propositions for specific donor segment engagement.

Connected to the evaluative process introduced in Module 2, this module deepens your understanding of donor decision-making and its implications for fundraising practices. It also provides essential knowledge for strategic planning in the final module. It is therefore necessary to have finished the required prerequisite learning activities outlined in the course materials and be familiar with the evaluative process of the prior two modules before attending the first session.

Planning Effective Fundraising

In this final module of the Certificate in Fundraising, you will employ a structured and evidence-based approach to developing a comprehensive strategic fundraising plan. Building on insights from the previous modules, you will apply strategic planning frameworks and decision-making models to effectively set fundraising objectives, prioritise strategic directions, and manage resources. You will also study how to conduct market segmentation and brand positioning for the purpose of selecting tactical activities that optimise income generation. By the end of the module, you will be able to implement budgeting, scheduling, and monitoring tools that clearly convey the

operational requirements for long-term fundraising success and use communication theory to develop a robust stakeholder communication plan that clearly conveys financial and operational requirements.

This module integrates learning from the previous three modules, equipping you with the skills to apply a structured, strategic approach to diverse fundraising scenarios. By combining practical application with theoretical insights, you will develop the confidence and expertise needed to create and justify data-driven fundraising plans. To engage fully with this module, you must have completed the required prerequisite learning activities outlined in the course materials for all prior modules.

Course Resources

Learners need to purchase the course text book:

Sargeant, A. and George, J. (2021) Fundraising Management: Analysis Planning and Practice (4th Edition), Routledge, London.

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

Required readings can be found on the 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 however the online learning platform will also offer some suggestions of additional reading to support each module.

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. The IDPE community members forum is also a good place to ask questions or seek information to support you with completing each module.

Course Modules

Module 1: The Fundraising Environment (CF400)

This module aims to provide learners with a comprehensive understanding of evidence-based strategic planning as a core element in achieving sustainable fundraising growth. Learners will explore how theoretical frameworks can be effectively integrated into practical fundraising activities to improve organisational performance.

Through research-enriched learning, learners will engage with contemporary fundraising theories, case studies, and sector-specific research to critically analyse external market factors that influence fundraising outcomes. This approach will encourage learners to develop their analytical skills, applying evidence-based insights to assess risks and identify strategic opportunities.

The module is designed to equip learners with practical skills that align with real-world fundraising challenges, enhancing their ability to apply strategic planning techniques in professional settings. By integrating theory with practice, students will gain the knowledge and skills necessary to contribute effectively to not-for-profit organisations' growth and sustainability.

The module also emphasises the development of transferable skills, such as strategic thinking, risk evaluation, and opportunity prioritisation — all of which are highly valued by employers in the not-for-profit sector and beyond.

By the end of this module learners should be able to:

- Identify and employ a relevant mix of models that support the evaluation of the fundraising environment.
- Differentiate and evaluate the factors that most significantly impact on a chosen organisation.
- Examine the implications and possible long-term consequences for the identified organisation if trends continue.
- Appraise and select prioritised material, information, data and statistics that impact on the chosen organisation.
- Present a briefing of findings for the specified organisation in a professional manner.

Module 1 Assignment

Assignment 1: External Audit (100%)

An external audit based on the chosen organisation.

The audit should consist of:

Report (2000 words)

The External Audit should consist of relevant models and focus on a review of factors to be considered as part of developing your fundraising strategy.

In doing so it will build a more detailed picture of the external environment that the chosen organisation is working within.

Briefing Paper (500 words)

The Briefing Paper will provide an executive summary identifying the most significant opportunities and threats arising from the analysis that could support the development of the chosen organisation

The word count for this assignment is 2500 words.

Module 2: Fundraising Methods and Approaches (CF401)

This module aims to equip learners with the knowledge and skills required to evaluate an organisation's fundraising effectiveness using structured approaches. By examining fundraising methods, income mix, and alignment with operational objectives, learners will develop a comprehensive understanding of internal factors that influence fundraising success.

Through research-enriched and activity-based learning, learners will engage with current sector research, case studies, and debate to inform their evaluations. Practical exercises will allow learners to apply evaluative techniques in real-world contexts, supporting their ability to identify strategic priorities for optimising income streams.

This module is designed to enhance learners' professionalism and employability by equipping them the skills

to integrate strategic insights, enabling them to contribute more effectively to strategic planning and fundraising development.

By the end of this module learners should be able to:

- Examine models, methods and practices of fundraising in the context of a particular organisation.
- Apply evaluation techniques to identify the fundraising potential and concerns relating to the capacity of the organisation identified.
- Evaluate the use of digital systems and A.I. in fundraising for the specified organisation.
- Analyse the ethical consideration and sustainability practices in fundraising,

including the role of EDI, within the context of nonprofit organisations.

- Prioritise key insights to support strategic initiatives that will improve income stream performance in the context of the identified organisation's goals.

- Explain the internal appropriateness and external attractiveness of the chosen area of development.
- Support with theories, models, data and statistics.

The word count for this assignment is 2500 words.

Module 2 Assignment

Assignment 2: Internal Audit (100%)

Analyse existing approaches to fundraising and their ability to meet the aims of the chosen organisation. Identify and conduct a risk assessment of fundraising practices and linked activities before compiling a prioritised list of strategic priorities for the organisation to pursue.

Conclude with a summary designed to engage multiple audiences and facilitate organisation wide discussion around future fundraising plans. This summary should highlight key findings from the audit, explain why they are important to the organisation's fundraising performance and propose what you think is possible if they receive appropriate attention.

- Identify one area: **either** one existing fundraising area to develop or one new fundraising area to introduce
- Explain how the chosen area will meet the organisations fundraising objectives,
- Explore how the organisation could develop/improve the new and existing income streams.

Module 3: Donor Motivation: Insights, Communications and Psychology (CF402)

This module aims to provide learners with a critical understanding of donor motivation and behaviour, enabling them to develop more effective fundraising communications and strategies that foster long-term, meaningful donor relationships. Learners will gain insights into how individual and collective motivations can be used to shape donor engagement and influence fundraising outcomes.

Through research-enriched learning, learners will engage with academic literature, sector reports, and case studies to explore the application of theory in responsible fundraising communications. They will critically analyse donor decision-making processes and journey development and assess how these insights can inform fundraising strategies that enhance donor satisfaction, loyalty, and lifetime value.

By linking theory with practice, the module will strengthen learners' ability to apply insights in donor segmentation, personalised engagement, and stewardship. It will also reinforce the evaluative skills introduced in Module 2, supporting learners in integrating donor psychology into internal fundraising operations and tactics.

The module is structured to develop learner's knowledge of evidence-based, donor centric engagement and relationships management — which is essential across all types of fundraising practice in the not-for-profit sector.

By the end of this module learners should be able to:

- Identify the individual and collective drivers of donor motivation and behaviour using relevant theoretical frameworks.
- Assess and critique an organisation's current communications with appropriate use of integrated communication tools.
- Analyse proposition development and articulation of a case for support, with effective use of research on segmented donor motivation and decision-making processes.
- Evaluate the effectiveness, appropriateness and ethicality of stakeholder engagement in achieving fundraising goals using a range of sources.
- Propose evidence-based recommendations based on prior analysis and evaluation to improve existing communication practices for better fundraising performance.

Module 3 Assignment

Assignment 3: Communications Audit (100%)

Focusing on a specific group of donors, you are required to critically analyse engagement with that group in a fundraising context, applying theoretical frameworks and research to assess your

organisation's current communication and stakeholder engagement strategies. Your analysis will lead to the development of evidence-based recommendations for improving fundraising effectiveness and donor relationships.

By completing this assignment, you will:

- Demonstrate an understanding of donor motivations, using appropriate theoretical frameworks.
- Critically assess an organisation's fundraising communications and engagement strategies.
- Apply research to evaluate proposition development and the articulation of a case for support.
- Analyse the ethical and practical considerations in donor engagement.
- Present evidence-based recommendations to enhance donor engagement and fundraising performance.

The word count for this assignment is 2500 words.

Module 4: Planning Effective Fundraising (CF403)

This module aims to provide learners with a structured, evidence-based approach to developing a strategic fundraising plan, equipping them with the theoretical knowledge and practical skills required to design and implement effective, data-driven fundraising strategies. By applying strategic planning frameworks and decision-making models, learners will prioritise fundraising activities, optimise

resource allocation, and develop tactical plans that support sustainable income generation.

Learners will explore key financial and operational aspects of fundraising, including budgeting, scheduling, and monitoring tools, ensuring they can track performance and adapt strategies to maximise impact. The module will

emphasise the role of effective stakeholder communication in fundraising success and incorporating communication theory to help craft clear and compelling engagement plans for internal and external audiences.

By developing and communicating a comprehensive fundraising plan with stakeholders, students will build skills that are highly relevant to careers in fundraising, philanthropy, non-profit management, and strategic development roles.

By the end of this module learners should be able to:

- Interpret and apply strategic planning frameworks to prioritised data and analysis findings to competently write appropriate fundraising objectives and goals that align with organisation goals and capacity
- Employ relevant course theories to effectively support strategic decisions that will help achieve your fundraising objectives.
- Propose and appraise a range of tactical fundraising activities that align with organisation capacity and can meet the strategic expectations of the plan.
- Select and support key performance measures to monitor and control effectiveness of the strategic plan.
- Develop and defend a structured activity schedule and detailed budget that effectively communicates financial and operational requirements to non-specialist audiences.

Module 4 Assignment

Assignment 4: Fundraising Development Plan (100%)

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

Your plan will introduce the context of the organisation and should focus on achieving a specific objective for a specific form of fundraising or securing funding for a particular project or service. Your fundraising plan will explain key strategic decisions using course models and must be written in a format to be read by stakeholders across your organisation and be approved for implementation by senior management without the requirement for any further work.

In creating this practical proposal, you should rely on readings and concepts, including tactical plans, budgets and critical path analysis from across the course to inform your analysis and justify the plan you propose to undertake.

While this is a practical document you must still reference any course material or ideas that you use in your plan.

Your plan must take account of the findings from the audit you conducted in Module 1 and 2 and further build on this analysis with learnings from Module 3.



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