Relationship-based fundraising centres on the reality that ‘people give to people.’ Whether a donor is an organisation with lots of staff, or simply a wealthy individual, the decision to give or not give will be made by a human being. Therefore, to build great relationships with your donors, you must have a strong team of people ready to build meaningful rapport and connections.

This section will help you assess and maximise the role of your organisation’s Board and Team in the context of major gift fundraising.
Your Board of Trustees is a key organisational asset that you can – and should – leverage for fundraising success. In most cases, they are the most senior people in your organisation, who can make or break your fundraising plans, set budgets that impact your targets, approve investments that can help take your products to the next level, and provide introductions, influence, guidance and donations. For any role, it is good practice to maintain a strong relationship with the board, but for fundraising it is especially vital.

**HOW CAN MY BOARD HELP ME FUNDRAISE?**

Board members can sometimes feel hesitant to support with fundraising, especially if they aren’t comfortable asking for money directly. It’s important to help them understand the myriad of ways they can support above and beyond this. For example:

- **PERSONAL NETWORKS**: support them to map out their connections to identify new prospects, or to introduce you to already-identified prospects. If you want them to actively identify potential prospects, you can share the ‘Donor Personas’ you created in the section called ‘Understanding Your Donors’ to add clarity.

- **OPINION AND INSIGHTS**: ask for their opinion on your approach to get more buy-in and trust. Trustees see your organisation from a very different perspective, and may have unique insights into the world of donors.

- **EVENT HOSTING**: ask them to co-host events, be part of a discussion panel, network with specific attendees, and invite their contacts to events.

- **ACCESS TO OPPORTUNITIES**: explore any other resources and opportunities that Trustees may have access to (e.g. possibility to host an event at their home or workplace, inviting you to networking events they are attending, securing in-kind donations from corporates, etc.).

- **MAKING DONORS FEEL SPECIAL**: they can help you in stewardship and cultivation from a ‘senior stakeholder’ perspective, it will make your donors feel valued.
HOW SHOULD I WORK WITH MY BOARD?

To collaborate successfully with your Board, you have to carefully manage their involvement. Here are a few tips:

• **GET THEIR BUY-IN:** before they can support you with fundraising implementation, your Board has to buy-into your wider fundraising strategy. Ensure they are consulted in the strategy design process, educated on the reality of what’s achievable (and by when), and happy with the finalised plan.

• **BRIEF THEM THOROUGHLY:** Board members will likely have a high-level understanding of your organisation’s work and focus, but if you want their support on fundraising, they may require a more in-depth briefing of your goals, targets, weaknesses and strengths, as well as your general direction of travel. Make sure they understand the whole picture, and why their support is critical for success.

• **GIVE THEM CLEAR ACTIONS AND DEADLINES:** Board members are usually busy people, so asking them to ‘help with fundraising’ or ‘make introductions to donors they know’ might not be the most efficient way to engage them. Donors need clear, tangible requests that prompt them to think specifically. Requests like ‘help us think through speakers for this fundraising event’ or ‘review this list of prospective donors and make introductions to anyone you know’ will be much more successful.

• **EQUIP THEM WITH THE RIGHT TOOLS:** ensure your donors have the right communications assets and tools to advocate for your organisation in their circles of influence. At a bare minimum, they should know your organisation’s pitch and have access to a high-level pitch deck they can use and share quickly.

• **PRIORITISE WHAT YOU ASK FROM THEM:** Board members are busy people so make sure you’re asking them to support with the most critical elements and not overwhelming them with too many competing tasks.
PERSONAL SKILLS AUDIT

If you are planning to engage your Board of Trustees in fundraising activities, you first need to understand the following:

- **SKILLS**: what they do (and don’t) know about fundraising
- **COMFORT**: what they feel most comfortable doing with regards to fundraising

**OBJECTIVE**

To assess your Board’s readiness and confidence to support your organisation’s fundraising efforts.

**HOW TO RUN THE EXERCISE**

**STEP 1**

List out all the tasks and skills you and your team can think of that are essential for the successful cultivation of your priority donor audiences. Examples are included in the following templates:

**TEMPLATE 1: FUNDRAISING QUESTIONNAIRE**

<table>
<thead>
<tr>
<th>STATEMENT</th>
<th>TRUE</th>
<th>SORT OF TRUE</th>
<th>SORT OF FALSE</th>
<th>FALSE</th>
<th>NOT SURE</th>
</tr>
</thead>
<tbody>
<tr>
<td>I enjoy (or think I would enjoy) the process of fundraising.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I feel comfortable explaining exactly what our organisation does, and how</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>and what we need support with.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I have an in-depth understanding of our organisation’s fundraising strategy.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I understand the day-to-day process of major gift, relationship-based fundraising.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I feel very clear about my specific role, and what is expected of me, with regards to our organisation’s major gift fundraising strategy.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I understand the stages of fundraising (identification, motivation, cultivation, solicitation, acknowledgement, stewardship) and how I can be helpful in each one.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I would like to improve my fundraising skills.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am happy to attend meetings with donors, and am making a direct ‘ask’ myself.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I am happy to attend meetings with donors, but I prefer not to make a direct ‘ask’ myself.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I have a strong personal network of people that are viable donor prospects for our organisation – and I am comfortable making these introductions.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I need to thoroughly understand the donor journey (i.e. how my contacts would be engaged) in order to feel comfortable making introductions.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I fully understand regulation and risks around fundraising (e.g. information management, GDPR).</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**TEMPLATE 2: SKILLS QUESTIONNAIRE**

For the following activities, ask your Trustees how confident they would feel doing them. This will give you a sense of how comfortable they would be performing specific fundraising tasks, and where they could add the most value. If appropriate, add or remove tasks and skills to reflect your organisation’s needs.

<table>
<thead>
<tr>
<th>TASK / SKILL</th>
<th>VERY CONFIDENT</th>
<th>QUITE CONFIDENT</th>
<th>NOT SO CONFIDENT</th>
<th>NOT CONFIDENT AT ALL</th>
<th>NOT SURE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Identifying new donor prospects (e.g. through network mapping)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Making introductions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>I have an in-depth understanding of our organisation’s fundraising strategy.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Networking at events</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Having 1:1 meetings/coffees</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Building meaningful relationships with potential donors</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Directly asking for money</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Speaking in detail about the organisation’s programmes, activities and strategy</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Speaking in detail about the organisation’s fundraising ambitions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Speaking in detail about the organisation’s impact</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Speaking about why I’m passionate about the cause</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Being a speaker at an event</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hosting an event at my home</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
STEP 2
If you are comfortable doing so, share the self-assessment quizzes with your Board members. If you think this is not appropriate, you can always collect the answers to those questions through an informal conversation, or during Board meetings.

STEP 3
With the knowledge you have gathered, you will now be able to organise the answers and get a clearer picture of:

- Who on your Board feels most comfortable doing what, and their willingness to support.
- What training opportunities you could provide to support your Board’s fundraising efforts.

WHAT NEXT?
You can now include your Board members in your fundraising activities by allocating tasks to each person, based on their individual preferences and skills. If they indicated a lack of knowledge to perform specific activities, you can also invite them to read relevant sections of this Guide, do some of the proposed activities together, or organise internal training sessions to share your fundraising knowledge with them.
The Team

INTRODUCTION

The management of fundraising teams, and the development and support of staff, differ greatly between organisations and countries. Some common themes and challenges in the less successful contexts point to high workloads, tight budgets, too little training, high staff turnover, and disproportionate expectations and targets. But how to address these?

The following pages include several exercises, tools and resources for you to use as a manager of fundraisers, or with your colleagues if you’re a junior fundraiser, to create a strong, resilient and collaborative working environment set-up for fundraising success.
PERSONAL SKILLS AUDIT

The key to a strong fundraising team is to ensure all the right skills are represented within it. This doesn’t mean every person must have every skill, but everyone should be supported to make use of their existing skills, and build them where they don’t already exist.

OBJECTIVE
To define the most important skills your team members have and identify where support is needed.

YOU WILL NEED
- A computer with a programme that allows you to make data tables, such as Excel

HOW TO RUN THE EXERCISE

STEP 1
List out all of the skills you and your team can think of that are essential for your priority donor audiences, and fundraising within your organisation. These can differ greatly, but you should focus broadly on what your donors, co-workers, leaders and end-users need. For example:

- Identifying new donor prospects
- Doing research on prospective donors
- Networking at events
- Having 1:1 meetings/coffees
- Directly asking people for money
- Public speaking at events
- Managing the day-to-day of donor relationships
- Managing the administration of fundraising activities
- Sensitively working with end-users to tell their stories
- Influencing the Board to support fundraising activities
- Working with budgets and data
- Building meaningful relationships with donors
- Supporting co-workers to stay motivated
- Writing high quality proposals and reports
- Speaking about the organisation’s impact
- Speaking about the organisation’s fundraising ambitions
- Speaking about the organisation’s programmes, activities and strategy
- Ensuring fundraising is compliant with relevant regulation
**STEP 2**
Once you have a final list, create a table with each of the skills listed, and two columns for ‘Skill Level’ and ‘Use Level’, and ask each team member to complete it from their own perspective, with a score from 1 – 10:

<table>
<thead>
<tr>
<th>SKILL</th>
<th>SKILL LEVEL</th>
<th>USE LEVEL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1 (Novice) to 10 (Expert)</td>
<td>1 (Never Use) to 10 (Always Use)</td>
</tr>
<tr>
<td>Writing high quality proposals</td>
<td>8</td>
<td>10</td>
</tr>
<tr>
<td>Speaking at events</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>Etc.</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

**STEP 3**
In pairs with colleagues, or with a line manager, discuss the skill ratings together, and use this matrix to map and identify areas where action is needed to better use, build or share skills:

- **MISSED OPPORTUNITIES**
  - HIGH SKILLS (6 - 10) / LOW USE (1 - 5)
    - Refocus role to better-use skills
    - Train and support other team members on these skills

- **SET UP FOR SUCCESS**
  - HIGH SKILLS (6 - 10) / HIGH USE (6 - 10)
    - Ensure support to manage workload
    - Mentor other team members

- **STUCK IN PLACE**
  - LOW SKILLS (1 - 5) / LOW USE (1 - 5)
    - Provide training and support to build skills
    - Provide opportunity to shadow and try new things

- **SET UP FOR FAILURE**
  - LOW SKILLS (1 - 5) / HIGH USE (6 - 10)
    - Evaluate risk of damage to donor relationships and staff confidence
    - Reallocate work, and provide support and training to build skills
STEP 4
As a manager (or, if appropriate, as a carefully facilitated group discussion), compare skill lists across the team, and identify skill areas where:

- **TRAINING IS NEEDED**: if there are no ‘high skill’ ratings against a particular skill.
- **EXPERIENCE IS NEEDED**: if there are no ‘high use’ ratings against a particular skill, even where there are ‘high skill’ ratings.
- **SUPPORT IS NEEDED**: if there are a lot of ‘high use’ ratings against skills with ‘low skill’ ratings.

STEP 5
Agree as a team where training, experience and support can be given through activities like workshops, shadowing, mentoring and external courses. Invite everyone to set measurable personal objectives to build-up a low skill score, and support a co-worker to build up one of theirs, too.

WHAT NEXT?
We encourage organisations to do this activity at least once per year, perhaps during an Away Day or team-building session. Not only can it open up useful conversations, and invite commitments to create meaningful changes, but it can allow everyone to track their progress in vital skill areas over time!
**PREVENTING BURNOUT**

Fundraising can be a reasonably stressful profession. Being rejected by donors, having ambitious targets and worrying about the consequences of not securing income can all lead staff to feel pressure and stress. In a supportive environment, this is not usually a problem, but too much stress for too long causes burnout. Burnout can lead to staff leaving, underperforming and becoming ill, and should be avoided as much as possible.

**WHAT IS BURNOUT?**

Burnout is emotional, physical, and mental exhaustion caused by excessive and prolonged stress. It occurs when you feel overwhelmed, emotionally drained and unable to meet constant demands. There are a number of common signs of burnout:

- Constant tiredness
- Depression and sadness
- Not wanting to go to work
- Finding tasks more challenging than usual
- Feeling angry or resentful about your job or colleagues
- Headaches, stomach aches and digestive discomfort
- Getting more emotional than usual
- Lowered immune system, and more frequent illness
- Memory problems
- Sleep problems
- Anxiety or panic attacks
- Impatience

**HOW DO I AVOID BURNOUT?**

The number one way to avoid burnout is to ensure you have enough staff to deliver the work you want done. However, operating in a budget-conscious environment might mean that is not always possible. The ideal goal should be high job satisfaction, commitment, energy and creativity from your teams, and you can cultivate this with:

- **CELEBRATING WINS**: encourage your team to take time to pause and celebrate when gifts come in, targets are met, and projects get funded. This will help with morale, and enable everyone to feel more resilient to the next ‘no’ they hear.
- **DEFINING AN ‘END POINT’**: fundraising can sometimes feel like it is never done, because there is always more money to raise. Defining regular ‘end points’ to specific fundraising projects, or organising your work into ‘sprints’ can help fundraisers feel a sense of progress.
- **BUILDING CAPACITY**: ensure training and development opportunities are given to everyone, including shadowing in other teams, away-days and paid-for training sessions.
- **TAKING BREAKS**: this one sounds obvious, but too often the workplace culture for fundraising can be skipping lunch, working late and not resting. Don’t let this happen. Encourage your team to take breaks, and see out-of-hours working as a sign of a problem that needs addressing.
- **HAVING STRONG, SUPPORTIVE MANAGEMENT**: a good manager should be able to ensure your team members have reasonable workloads, help them to reprioritise and rethink their approaches, and support when they need it.
- **CONNECTING WITH IMPACT**: many fundraisers are motivated by the cause they work for, but are not often exposed to the ultimate impact. Just like you should try to provide your donors with opportunities to connect with the impact of what you do, ensure your fundraisers can see and feel proud of what they are helping make possible.
FUNDRAISING KEY PERFORMANCE INDICATORS

Many organisations and fundraising teams use just one indicator of performance: money raised. Whether a team or individual has been successful during the year is often viewed as a simple ‘yes or no’ question, based on whether they met their targets. However, we know that fundraising success is much more complex than this, and needs to be measured in more nuanced ways. For example:

- **PROGRESS**: a newly established fundraising team might not cover their own costs right away, but could be making great progress in building a loyal donor base.
- **MARKET-ADJUSTED TARGETS**: targets that are set based on organisational need (i.e. how much we want), rather than market viability (i.e. how much is out there), can lead to a perception of failure when a fundraising team is actually performing at a high level based on what is possible.
- **NON-FINANCIAL TARGETS**: financial targets being met, or exceeded, might not always mean your team is doing well, as these numbers don’t show things like burnout, high turnover or gaps in your pipeline.
- **RELATIONSHIPS BUILT**: a donor might not have given funding within the year, but the relationship that has been built with them over time could lead to a bigger donation later on, and that work should be measured and celebrated, too.

HOW TO RUN THE EXERCISE

**STEP 1**
Ask each of your colleagues, in different teams or areas, including finance, communications, programmes, leadership and the Board, one simple question: **‘Other than money raised, what does successful fundraising look like from your position in the organisation?’**

You might get answers such as ‘clearer forecasts of projected income’, or ‘more consistent messages about our work’ or ‘key questions to answer in programme reports’. Note them all down.

**STEP 2**
As a group or on your own, think from your donors’ perspective, especially considering your Donor Personas if you have created them, and answer the question: **What does a successful relationship with the fundraising team look like?**

You might suggest things like ‘hearing updates from projects’, ‘having time to get to know each other’, ‘knowing the difference my money can make’, and ‘feeling special’. Note all of these down.

**STEP 3**
Summarise all these ‘successes’ into one list, and add any others you think are missing from the perspective of a fundraiser. Some examples might be ‘adding names to the pipeline’, ‘securing meetings with donors’, ‘feeling motivated’.

OBJECTIVE
To establish your organisation’s Key Performance Indicators (KPIs).

YOU WILL NEED
- A computer with a programme that allows you to make data tables, such as Excel
STEP 4
Create a KPI table for each success measure (you might want to group or simplify some of them into categories), such as the following example:

<table>
<thead>
<tr>
<th>AREA</th>
<th>OUTCOME</th>
<th>INDICATORS</th>
<th>TARGET</th>
<th>DATA SOURCE</th>
<th>WHEN TO MEASURE</th>
<th>BENCHMARK</th>
</tr>
</thead>
<tbody>
<tr>
<td>Donors</td>
<td>Donors feel special</td>
<td>Time spent with donors</td>
<td>One meeting or call per quarter</td>
<td>Database</td>
<td>Annually</td>
<td>Year 1: one meeting per year</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Donor satisfaction feedback</td>
<td>80% of donors say they’re satisfied</td>
<td>Donor survey or meetings</td>
<td></td>
<td>Year 1: no donors were asked</td>
</tr>
<tr>
<td>Finance</td>
<td>Budgets are set with realistic projections</td>
<td>Fundraising team involvement in budget process</td>
<td>Fundraising involved at every stage</td>
<td>Experiences of staff</td>
<td>Annually</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Level of confidence in meeting budget requirements</td>
<td>High level of confidence</td>
<td>Self-reported confidence level of staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>High level of understanding</td>
<td>Skills Audit</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Examples of engagement with budget in creation of donor materials</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

STEP 5
Prioritise the list by the most important ones, agreed between you and your team. Aiming for a Top 10.

WHAT NEXT?
Now you have your list of Key Performance Indicators. Use these to report on your progress in fundraising, and paint a fuller picture of how things are going. This can be used in discussions with your Board members, or your other funders, to show how you are doing beyond the single annual target figure. It can also be used to track areas where you are falling short of what’s needed to be successful for the future (even if you are meeting your financial targets!), and support you to focus on improving those.
PORTFOLIO SIZE & WORKLOAD

One of the most important ways of ensuring your fundraising team is able to do a good job, and preventing them from burning out, is to keep their portfolio to a manageable level. A ‘portfolio’ refers to the number, stage and type of donor relationships a person is responsible for. There is no ‘magic number’ of donors a fundraiser should have in their portfolio – the answer is different for every organisation, and depends on the level of engagement you are providing, and the level of income you need to justify each paid staff member. The following exercise will support you in identifying what can be reasonably expected in your specific context, and help you put together a plan.

OBJECTIVE
To determine the right portfolio size and workload for each team member in charge of fundraising.

YOU WILL NEED
• A computer with a programme that allows you to make data tables, such as Excel

HOW TO RUN THE EXERCISE

STEP 1
Estimate, as a team, the amount of time (in working hours) it takes to effectively complete each of the following steps for 10 donors for one year at each level on this matrix (if you have very few donors, you could do this for one donor for one year).

This is going to take some educated guesswork, and it’s okay to not be completely exact.

<table>
<thead>
<tr>
<th>LOW VALUE</th>
<th>MID VALUE</th>
<th>HIGH VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>PROSPECTING</td>
<td>0.1 hours</td>
<td>5 hours</td>
</tr>
<tr>
<td>OUTREACH</td>
<td>2 hours</td>
<td>2 hours</td>
</tr>
<tr>
<td>CULTIVATION</td>
<td>5 hours</td>
<td>20 hours</td>
</tr>
<tr>
<td>STEWARDSHIP</td>
<td>10 hours</td>
<td>40 hours</td>
</tr>
</tbody>
</table>
STEP 2
Using your Gift Table if you have one (if not, you can find a template in the ‘Financial Targets’ section), or your pipeline, list out how many donors you need to be engaged at each stage of this process for the next 12 months in order to meet your targets. Don’t forget to include your current donors in the ones who need to be stewarded! For example, for high-value donors, you might say:

This step can also be done using a calendar method, to view multiple relationships and their stages (Prospecting, Outreach, Cultivation and Stewardship) over time. For example:

<table>
<thead>
<tr>
<th>DONOR 1 (NEW)</th>
<th>DONOR 2 (NEW)</th>
<th>DONOR 3 (NEW)</th>
<th>DONOR 4 (NEW)</th>
<th>DONOR 5 (EXISTING)</th>
</tr>
</thead>
<tbody>
<tr>
<td>JAN</td>
<td>FEB</td>
<td>MAR</td>
<td>APR</td>
<td>MAY</td>
</tr>
<tr>
<td>P</td>
<td>O</td>
<td></td>
<td></td>
<td>P</td>
</tr>
<tr>
<td>P</td>
<td>O</td>
<td>C</td>
<td>C</td>
<td>C</td>
</tr>
<tr>
<td>P</td>
<td>O</td>
<td>C</td>
<td>C</td>
<td>C</td>
</tr>
<tr>
<td>O</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**TOTAL**

<table>
<thead>
<tr>
<th>PROSPECTING</th>
<th>OUTREACH</th>
<th>CULTIVATION</th>
<th>STEWARDSHIP</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>2</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>1</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>0</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>0</td>
<td>2</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**TOTAL:**

<table>
<thead>
<tr>
<th>PROSPECTING</th>
<th>OUTREACH</th>
<th>CULTIVATION</th>
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**TOTAL:**

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14
STEP 3
Using the figures from Step 1 and Step 2, work out how many hours of work are needed to deliver on your targets and pipeline. For example, for high-value audiences:

<table>
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<th></th>
<th>NUMBER OF DONORS</th>
<th>NUMBER OF HOURS PER 5 DONORS</th>
<th>TOTAL HOURS PER STAGE</th>
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<td>STEWARDSHIP</td>
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<td>1100</td>
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<td><strong>TOTAL FOR YEAR</strong></td>
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</table>

STEP 4
Use the total number of hours needed for the year in Step 3, to figure out the number of staff you need to be able to deliver on your pipeline.

For example, in the UK, a full-time worker (after holidays, lunch breaks and admin time) has roughly 1,200 productive hours per year. So, to meet the example of 2,120 hours in Step 3, you would need 1.8 staff members to meet the pipeline.

STEP 5
If you don’t have enough staff to meet your targets, you need to think about recruiting new staff, or adjusting your targets.

If you already have enough staff to meet your targets, you can begin to plan the allocation of those relationships across each individual’s portfolio. Do this by making little paper ‘building blocks’ of donors, using Post-Its, and allocating them across your staff team based on their budget of hours, and their skills and experience. For example:

**ATIFA**
1,200 HOURS
- 10 High Value Donor Prospecting
- 5 High Value Donor Outreach
- 5 High Value Donor Cultivation

**DAN**
1,200 HOURS
- 20 Mid Value Donor Prospecting
- 20 Mid Value Donor Outreach

**JAMIE**
600 HOURS
- 30 Low Value Donor Prospecting
- 100 Low Value Donor Stewardship

WHAT NEXT?
Once you have discovered whether you have enough fundraising staff to meet your goals, you will know whether your strategy needs to address recruitment (see next exercise), or reallocation of donor engagement work across your team.

You can also use this data and information to start discussions about what your team members want to be working on, and make best use of their skills and experience by building a portfolio that brings out the best in them. For example, some people like to have a mix of donor types, others prefer to do all the face-to-face work, and others like to do writing.
RECRUITING

If you have decided that a new team member is required for you to meet your fundraising goals, you will now need to go about recruiting them. This can feel like a daunting process, and finding the right person might seem risky and difficult. However, don’t forget there are many professional fundraisers out there, and even more people with transferable skills from other industries who could be the perfect fit for your team!

The key things are to ensure you are clear on the minimum skills you require, how much support you can give someone once they’re in the role, and the amount of time you are comfortable waiting for their work to bear fruit. That latter point is extremely important, because rushing fundraisers to deliver in too short a time period (e.g. ‘cover your own costs in the next 12 months’) is likely to result in an unhappy team member and lower performance.

HOW TO RUN THE EXERCISE

STEP 1
The first step is drafting the job description for the new role. This should be really clear, standardised for every staff member with the same title, and an accurate representation of what is expected. The document should cover the following elements, and an example is included at the end of this section.

Background on the Role
Provide applicants with some background on why this role is open. Did the previous person leave? Is it a new role? What is the organisation aiming for that this role is part of? What support and resources will the successful candidate be working with? Are there any targets set for this role?

Successful Candidates
Give a brief description of the kind of person you are looking for – bring the criteria and bullet point list to life!

Responsibilities
Making use of your RACI (Responsible, Accountable, Consulted, Informed) Framework. If you haven’t done one, you will create it in the Roles and Responsibilities exercise later in this section, or simply list out the key activities you would need this person to deliver or oversee, and draft a job description that addresses the activities within the following categories (add more if you need them):

- Fundraising and Network Building
- Research and Administration
- Leadership and Management
- Strategy and Planning
- Operations and Communications
- Self-Management
- Cross-Team Contribution
- Research and Administration
- Strategy and Planning
- Operations and Communications
- Self-Management
- Cross-Team Contribution

OBJECTIVE
To recruit a new fundraising team member.

YOU WILL NEED
- A computer with internet access
- A word processing document to summarise and file the information
Key Stakeholders
List out the key internal people this role would need to manage relationships with.

Knowledge and Experience
List out the things the successful candidate must already know, or have experience of doing. You might want to separate this list into ‘Essential’ and ‘Desirable’. Be realistic here, and don’t focus too hard on ‘money raised’ – focus more on their experience of building relationships, thinking strategically, and other core skills that are the right fit for your team.

Skills & Competencies
List out the things the successful candidate must know how to do, or be able to demonstrate. Don’t forget more subjective things like friendliness, negotiation and optimism!

STEP 2
Research similar roles that have been advertised in your city, and country, to see the salary range that candidates might be expecting. In some countries, hiring fundraisers can be quite competitive, and so higher salaries might be expected, but you should focus on what is appropriate for your context.

Note: in many countries it is forbidden to pay fundraisers on a commission basis, and this is because of the ethical challenges with asking donors for money that will then be used, in part, to pay you commission. We do not recommend using this model.

STEP 3
Circulate the job description internally to ensure you have buy-in from everyone who would be working with the candidate, and it includes all activities needed by the team.

STEP 4
If you have the budget to use a recruitment agency, you can ask them to advertise the role and put forward some suggested candidates. If you do this, we would recommend using a non-profit or fundraising specific agency.

If you plan to advertise the position yourself, we recommend putting the job description in as many online places as possible, targeting the industries you want to recruit from. In many countries there are specific charity job boards, but social media platforms such as LinkedIn, Facebook and Twitter can be great places, too.

Finally, ask your Board, leadership and, where appropriate, donors to circulate the job description with their networks.

STEP 5
Shortlist your candidates based on the job description, scoring each applicant against each bullet point on the knowledge, experience, skills and competencies. The highest scoring candidates should be invited to interview.
STEP 6
Plan your interview process to focus on the knowledge, experience, skills and competencies that are most essential for your organisation. We recommend drawing these out through a combination of exercises, tests and conversation:

- **EXERCISES**: these can include things like donor roleplays, donor proposal writing, budget reviews, SWOT analyses, and other components of the job. The key is to provide interactive, unpredictable, but realistic scenarios in which candidates can demonstrate their skills.
- **TESTS**: these can include writing, proofreading, numeracy and other skills-based tests.
- **CONVERSATION**: ask candidates to share examples of times they have demonstrated the key skills and experience you need, as well as posing hypothetical situations and asking how they would approach them.

The interview should be conducted by the people who will engage most closely with the role, including their line manager, a senior person, and if possible, anyone they would be managing.

STEP 7
Once you have selected your chosen candidate, and they have accepted the role, don’t forget to plan a clear and thorough induction process for them, so they can start off strong!
EXAMPLE JOB DESCRIPTION

FUNDRAISING DIRECTOR
NEW. POSTED 17 HOURS AGO. 11 APPLICANTS

REPORTING TO: CEO

BACKGROUND ON THE ROLE

We recognise our ambitious strategic goals mean we need great people. Our organisation offers a meaningful giving opportunity for funders who want to make the world a fairer place, and help those in need. We are looking for an experienced, creative and ambitious fundraiser to help us enhance this experience for our donors and partners, and work to bring even more people into our work.

This role will be central to how we think about and do fundraising in the future, building on the great work our team has done so far, and supporting us to systemise and grow our fundraising. You will have the opportunity to both shape and grow quickly with the role and the wider organisation, as we enter our exciting next phase.

SUCCESSFUL CANDIDATES

To be successful, you will have previously demonstrated your skill at cultivating fruitful and sustainable relationships with donors in a non-profit environment, as well as thinking strategically and long-term about income generation in a multi-stakeholder context. You will be as comfortable advocating in Board-level discussions and negotiations with prospective donors, as you are building friendly rapport with frontline project leaders and thinking creatively about communications assets. You must possess excellent communication skills, including the ability to speak and write persuasively, and be able to quickly develop strong relationships with internal and external stakeholders in a busy and passionate team.

SALARY
Competitive

HOW YOU MATCH

SKILLS
• SKILL 1
• SKILL 2
• SKILL 3
• SKILL 4
• SKILL 5
• SKILL 6
• SKILL 7
• SKILL 8
• SKILL 9
• SKILL 10

CONTACT THE JOB POSTER

JOB DETAILS

SENIORITY LEVEL
Mid-Senior level

INDUSTRY
Non-Profit

EMPLOYMENT TYPE
Full Time

JOB FUNCTION
Philanthropy, Fundraising
RESPONSIBILITIES

FUNDRAISING & NETWORK BUILDING
- Identify, engage, cultivate and solicit individual, foundation and corporate donors to secure five- and six-figure gifts, and develop partnerships with financial and non-financial components.
- Support our leadership and Board to cultivate relationships with donors and partners, providing briefing, brainstorm and best practice guidance.
- Form and maintain relationships with donors, and key philanthropic connecting institutions such as banks, family offices, funds and law firms.
- Act as an ambassador for our mission and strategic priorities at events and conferences.
- Manage all donor and partner relationships, implementing and embedding an invigorated donor journey and rigorous stewardship practices to ensure consistency.

STRATEGIC LEADERSHIP
- Develop and lead the implementation of an ambitious fundraising strategy that ensures growth across a diverse range of income streams.
- Ensure a strategic fundraising lens is considered in all operational and project discussions and decisions.
- Collaborate with the leadership team to develop an optimistic, yet manageable KPI framework as the basis for fundraising performance management.
- Work to build on existing examples of excellent fundraising practice in the team, and further embed a positive fundraising culture.

OPERATIONS & COMMUNICATIONS
- Develop, refine and manage the pipeline of donors and prospects, championing the use of a CRM across the team.
- Coordinate, track and report on fundraising progress against target(s), preparing reports and delivering presentations to the senior leadership team and Board.
- Draft and edit funding proposal templates and bespoke pitches as necessary, working with the Communications team to ensure consistency.
- Prepare stewardship report templates, and bespoke reports for donors and partners on the progress of our work overall, and their respective funding areas.
- Simplify, refocus and repackage our Case for Support, Case for Need and Impact Statements to appeal to a variety of funding audiences.
- Work with the Finance team to incorporate realistic central and thematic budget forecasts into the fundraising process, monitoring income against these forecasts and focusing fundraising on emerging gaps.
SELF-MANAGEMENT
• Work to and regularly report on an agreed annual workplan, meeting targets and milestones, and proactively highlighting challenges.
• Prioritise and manage own workload.
• Take responsibility for personal development and seek out opportunities for training and support.

TEAM CONTRIBUTION
• Contribute to the overall vision of our organisation and develop and maintain positive relationships as an ambassador for the cause.
• Contribute to the welfare and wellbeing of staff and volunteers, wherever relevant.
• Uphold commitment to equal opportunities and inclusion in all aspects of your work.
• Take part in meetings, discussions, training and workshops as appropriate and required.
• Other duties as may reasonably be allocated by leadership team or Board from time to time.

KEY STAKEHOLDERS
• CEO
• Finance Director
• Communications Manager
• Project Manager
• Volunteers

KNOWLEDGE AND EXPERIENCE
• Previous experience in a similar position, or in an organisation at a comparable stage of growth.
• Minimum of 5 years of experience in fundraising role(s).
• Experience of cultivating and securing at least five figure gifts from donors.
• A record of success in establishing financial goals, organising and implementing strategies, analysing and identifying problems, and formulating creative solutions.
• Experience in managing a team is desirable.

SKILLS & COMPETENCIES
• A great communicator with excellent writing and public speaking skills.
• An outstanding relationship-builder with great negotiating skills, and the ability to network and influence at the highest level.
• An inclusive and motivating team-player, with the ability to work independently.
• Solid understanding of trends and priorities in fundraising, philanthropy and corporate impact, and an ability to keep up to date on these.
• Confidence in operating in a strategic role, and representing and engaging with senior level staff internally and externally.
• Excellent time management, organisational and prioritisation skills with the ability to juggle a wide range of competing demands and deliver to deadlines.
• High levels of computer literacy, as well as proficiency in donor / client management databases (e.g. Salesforce), Microsoft Word, Excel, PowerPoint and Outlook.
• Ability to evaluate problems and display good, sound and confident judgment.
• Mature, confident and well presented, with a sense of humour.
FUNDRAISING CULTURE

There's a famous quote from Peter Drucker, made famous by Mark Fields, President at Ford, that says “culture eats strategy for breakfast”, and nowhere is this more true than in fundraising. What Drucker meant was: no matter how good your strategy or planning is, if your team can’t work together effectively, it won’t get delivered or succeed. Often a poor culture can hold back progress, demotivate people and stop teams from collaborating, and donors can be scared-off or worried if they sense your team isn’t a cohesive group. Positive culture helps you to attract and keep great staff, motivate people to go above and beyond for you and your donors, and support each other to achieve big things. This is true of culture within your fundraising team, as well as the ‘fundraising culture’ across your wider organisation.

WHAT IS CULTURE?

Culture is the character and personality of your organisation. It’s the unique result of combining your organisational values, traditions, beliefs, interactions, behaviours and attitudes.

Fundraising culture is the extent to which your fundraising team has a healthy culture, and the extent to which your organisation understands the needs, behaviours and attitudes required for successful fundraising activities.

WHAT DETERMINES FUNDRAISING CULTURE?

1. LEADERSHIP

The way senior team members and the Board act and engage with others, what they prioritise, communicate most about, celebrate and ignore will inform what staff think of as good and bad behaviours and attitudes to bring to your organisation. If a leader ignores fundraising or champions it, it will make all the difference. Leaders who refer to fundraisers as ATMs or annoyances will not support a healthy functioning organisation.

2. MANAGEMENT

How your organisation and teams are structured and managed, and the systems, hierarchy, processes and goal-setting in place will determine how empowered and motivated your team can be, and the level of effort, engagement and performance they put into fundraising activities. It is important for managers of fundraising teams to have great relationships with other team managers.

3. WORKPLACE PRACTICES

The way the organisation does recruiting, selection, onboarding, pay reviews, recognition, training, promotions, performance management and tradition will impact the way staff engage with each other. Celebration around fundraising successes is a big way to instil positive practices here, as well as ensuring onboarding processes give staff exposure to other teams.
PEOPLE
The types of people you bring into the organisation (their personalities, beliefs, values, skills and experiences, and everyday behaviors) will be the core of your culture. Prioritise diversity of thought, and experience, rather than aiming for the same type of person over and over, but ensure the core values of the organisation (especially those around collaboration, support, communication) are reflected in every hire.

MISSION, VISION, AND VALUES
Ensuring your organisation has really clear - and widely understood - mission, vision and values is essential to creating a positive culture for fundraising. How else can your fundraisers live these values, or engage donors with them? Ensuring these are inspiring, consistent and emphasised is key. Supporting your fundraisers to champion these, and the need to fund their delivery, is important.

WORK ENVIRONMENT
Whether you’re virtually working, or have an in-person office environment, the items, decor, signage and use of space will impact the extent to which people can work together, understand each other, form bonds and anticipate each others’ needs.

COMMUNICATIONS
The ways communication happens between team members, especially between the fundraising team and others, will impact how the fundraising activity is viewed, and how well everyone is able to perform their roles together. The Finance and Communications teams are often the trickiest to integrate, but are the most important, especially when it comes to transparency in sharing information and making decisions.
ROLES AND RESPONSIBILITIES: RACI FRAMEWORK

Generating income requires many different skillsets and activities; one of the biggest challenges within a team can be the allocation of this work, and establishing clear lines of management and approval. A RACI Framework can help you do this – it stands for Responsible, Accountable, Consulted and Informed, and is a way to distinguish between the varying levels of involvement in specific activities that need to be done.

OBJECTIVE
To allocate tasks and determine roles for each team member involved in fundraising activities.

YOU WILL NEED
• Post-It Notes
• Coloured sticky dots, or coloured pens, with enough colours for all the people and roles involved to have one each
• A wall, or whiteboard

HOW TO RUN THE EXERCISE

STEP 1
Invite everyone to individually write down all activities that must be done to fundraise within the organisation, with one per Post-It. This should be specific, such as ‘write funding applications’ and ‘schedule meetings with donors,’ rather than general, such as ‘get grants’ or ‘cultivate donors.’

STEP 2
Have everyone share their Post-Its, three at a time, and group them on the wall with similar suggestions as you go. Once you’ve collected all the ideas, ask everyone to suggest anything that is missing.

STEP 3
Provide everyone with a page of sticky dots each, or a coloured pen each, making sure each person’s colour is easy to distinguish from everyone else’s. Then, have everyone place a sticky dot, or draw a symbol, on any of the Post-Its that have a task they feel they are involved with in any way.

STEP 4
Ask each person to complete a RACI Framework from their own, individual perspective, looking at the Post-Its with their own dot or symbol on for guidance (see RACI template below). This means looking at each activity they are involved with, and deciding whether they are:
• RESPONSIBLE: implementing this activity, in charge of actually doing it
• ACCOUNTABLE: managing this activity, in charge of ensuring it gets done
• CONSULTED: providing input and approval where needed for this activity
• INFORMED: kept up to date on the progress and completion of this activity
STEP 5
Work together as a group to create one central RACI Framework for your current fundraising activities. This might require simplification of some activities, and debate and discussion to arrive at a shared understanding.

STEP 6
Work together to adapt the RACI Framework to what you would like your future fundraising activities to look like.

Things to think about include:
- Ensure there are no blanks for ‘responsible’ (otherwise they might not get done!)
- Ensure there are no blanks for ‘accountable’ (otherwise there could be no support or oversight given to those responsible!)
- Ensure that where the ‘accountable’ person is also the ‘responsible’ person, there is always someone else being ‘informed’, to avoid siloes and paths of critical failure.
- Consolidate and combine similar or duplicate tasks, and better-allocate tasks where there are unnecessary overlaps.
- Decide on appropriateness of current job titles given each team member’s RACI, and discuss alternatives, if needed.
- Check that not too many people need to be ‘consulted’ for tasks, as it may cause inefficiencies in your processes.

Consider whether:
- Workload could be allocated differently to achieve the organisation’s goals.
- Enough support is being given to staff who are responsible for tasks that have no ‘accountability’ name.
- New staff are needed to provide capacity for tasks without ‘responsibility’.
- Activities with multiple people ‘responsible’ for them need more than one, and whether the person ‘accountable’ is supporting them to work together.
### RACI Framework Template

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<th>ACCOUNTABLE</th>
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Up Next...

Your team is now ready for the Donor Journey. In the last part of this Guide, you will learn how to implement your fundraising strategy. This involves finding and connecting with new prospects, finetuning your message, identifying partnerships, creating thought leadership and organising events.
Download Sections

Please visit our website to download all the sections of this Guide

WELCOME & WARM UP

SECTION 1
PART A: Preparing For The Process
PART B: Designing The Donor Journey

SECTION 2
PART A: Preparing For Implementation
PART B: Implementing The Donor Journey

COOL DOWN & GLOSSARY