

II. The Certificate Programme in Fund Raising Management

In the fall of 1983 The Canadian Centre for Philanthropy and Humber College, a Toronto community college, joined forces to launch the Certificate Programme in Fund Raising Management, Canada's first professional-level program in this field. The program was designed to provide novice fund raisers with the knowledge and skills they would need for successful fund raising in the 1980's while experienced fund raisers were offered an opportunity to study their field in depth and to develop new abilities and hone their skills.

Course Outline

The following is a brief outline of course content in the Certificate Programme in Fund Raising Management:

1. The Structures of Fund Raising Organizations

Participants study the structure of a successful fund-raising organization, examine the role of the board of directors, analyze financial functions and statements, study the tax rules affecting charities, and learn how to identify major tasks, and define positions in terms of required skills.

2. Fund Raising Planning and Strategy: Putting the Emphasis Where It Counts

Participants study the principles which provide the master framework for a fund-raising program. This course also permits students to study and understand their own organizations. Other topics include: putting together a case statement, the annual campaign, a capital campaign, funding for specific projects, dealing with deficits, and developing a fund-raising program and strategy.

3. Fund Raising Resources

Resources studied include: print materials, other tools and techniques, volunteers, and the board. Other topics include: when and how to use consultants, a look at marketing and personnel, and information and its significance.

4. Managing It All

This course focuses on the development of management skills including: supervision, management, and leadership in fund raising. It asks and answers such questions as: what skills are required for working with people and are the skills needed for management of staff and volunteers different? Students also learn how leaders can affect the success of groups, committees and task forces. Coping with change and management of time are also covered.

5. The Donors: Identification, Access and Results

All possible types of donors are analyzed by experienced fund raisers. These include: corporations, the board, foundations, governments, individuals, local groups and others. Participants learn how to identify, research, and approach each type of donor.

6. Fund Raising Follow-Through

This course teaches participants "what to do and when to do it" through a

thorough exploration of the donor cultivation cycle, the study of models for financial reporting, and information about how to maintain a full information base, how to find and develop new prospects, attracting bequests and endowments, planning for the future, and taking the long view.

7. Requirements for Award of the Certificate in Fund Raising Management
Participants seeking the Certificate in Fund Raising Management are required to complete five of the six courses offered, and to achieve competency in basic accounting. Five courses total 150 hours of instruction (5 x 30 hours). To help students apply their knowledge and skill in the work place, case studies and the use of actual materials and problems from the field are emphasized.

Planning Group

The Certificate Programme Planning Group, which included staff and volunteers from the Centre as well as representatives from the College, decided that a first step should be the development of a profile of the most likely prospective students. It was agreed that the program would attract:

- adult learners, from ages 20 to 60 who would probably be college or university graduates with previous education in a variety of disciplines;
- some new, some practising fund raisers;
- volunteers and staff members of voluntary agencies and their consultants;
- representatives from a variety of organizations in the fields of health, education, the arts, culture, professional associations, community groups; and
- representatives from non-profit organizations and campaigns of all sizes.

Design and Implementation

Planning for the Certificate Programme took into account a number of fundamental questions such as the characteristics of adult learners, the knowledge and competencies required by the fund raiser, the available educational methodologies, appropriate and extant resources (personnel and material), assessment of results and the need for appropriate recognition of educational achievement.

Here, in summary, are the factors addressed in the design and implementation of the First Certificate Programme in Fund Raising Management:

1. Adult Learning

- Recognition that learning habits and abilities vary with the individual. Each person learns at a different rate, in a particular manner, to a different depth, from a particular level of preparedness and with a different aptitude.
- Learning takes place when the subject matter is timely, has significance for those who are being taught, and has more than transient utility.
- People learn best in a supportive environment, i.e., one which reduces the chance of failure or where failure is treated in a matter-of-fact way that is non-judgmental and does not employ ridicule or create embarrassment.

- To be effective, learning should combine necessary lectures with an opportunity for student participation.

2. *Required Knowledge and Competencies*

- The program should include a core curriculum which would cover the basic knowledge known to be essential for successful fund raising.
- The program should also provide a working knowledge of necessary management skills such as the planning, organizing, supervising, implementing, monitoring and evaluating of successful fund-raising programs.
- Participants should be given an understanding of how successful fund-raising organizations and programs function and are structured to achieve defined objectives.
- Participants should develop an understanding of, and ability to work capably in, both staff and line capacities in their organizations and the parallel organizations of volunteers.
- Basic accounting knowledge and skills should be taught.

3. *Educational Methodology*

- Factual knowledge is usually transmitted through lectures.
- Small group discussions are used to permit participants to explore ways of applying what they have learned to actual work-place situations.
- Seminars encourage interaction between participants and instructors.
- Guest panelists from a variety of disciplines present current and often controversial subjects as the basis for lively discussions.
- Both written and oral assignments are used to encourage application of theory to practical problems and as a measure of student progress.

4. *Educational Resources*

- Instructors are recruited from the ranks of practising fund raisers and are selected for their particular strengths and expertise in the various aspects of fund raising.
- Participants have valuable knowledge, experience, and insights to offer each other through group discussions and their interaction with resource people and guest panelists.
- Audio-visual materials are used in each course as are periodical reprints and journal articles. Recommended reading lists and full bibliographies are provided where possible.
- Completion of the self-study text *Essentials of Accounting* is required for all those in the full Certificate Program.

5. *Measures of Achievement*

- The program is evaluated in light of the clearly defined objectives established for it.

- Educational and behavioural objectives are set out for each course in the program.
- Evaluation procedures have been designed and implemented so as to measure the performance of participants and instructors and the value of the courses.

6. *Recognition of Educational Achievement*

- Students who complete successfully five of the six courses in the program as well as the self-directed text *Essentials of Accounting* are awarded the Certificate in Fund Raising Management, presented jointly by The Canadian Centre for Philanthropy and Humber College.

“Distance Education” Under Development

The success of this first certificate program brought a number of requests from major centres across Canada. Plans are now in progress for the launching of similar programs in several other Canadian communities within a year. These will not, however, satisfy the needs of those living outside of major centres. To meet their needs, a “distance education” version of the program is being developed. A target date of late 1985 has been set for the first offering of this course.

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