DIPLOMA

FIA

Fundraising Institute Australia

The Professional Body for Australian Fundraising

The FIA's Diploma in Professional Fundraising is the property of
Fundraising Institute Australia (FIA).

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Welcome

Welcome to the FIA *Diploma in Fundraising.*

This guide, along with **Module 1,** will provide you with all the information you will need to help you complete the course.

Diploma in Fundraising

The *Diploma in Fundraising* is FIA's premier fundraising education program, signifying excellence and your commitment to best practice fundraising. This course is designed to solidify and expand your knowledge and skills as a fundraiser and as a leader in the non-profit sector. If you wish to maximise your impact, raise your profile and enhance your competencies in a growing sector, this is the course for you.

The Diploma:

- is relevant to the work of professional fundraisers
- includes a variety of learning experiences
- provides appropriate guidance, including readings and assignment tasks
- is set within the context of FIA's Code and mission to promote ethical and professional fundraising practice
- builds on knowledge and skills gained working in the field of fundraising
- provides highly regarded professional tutors who have a wealth of fundraising experience

The course provides:

- online self-paced study over a 12-month period
- the tools you need to help you achieve fundraising excellence
- challenging contemporary subject matter and the principles of fundraising best practice
- opportunities to build on your existing knowledge and skills in a structured learning environment
- appropriate guidance, readings and assessment tasks catering to a broad range of learning styles
- applied learning in people management especially adapted to the needs of professional fundraisers
- an invaluable component of FIA's range of integrated professional development and educational opportunities
- student discounts on FIA bookshop purchases.

Certified Fund Raising Executive (CFRE) Credential

Full participation in the *Diploma in Fundraising* is applicable for up to **180** continuing education points in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.

Course Delivery

The *Diploma in Fundraising* is available in online format only. Online access starts as soon as you log in for the first time. The e-learning platform 'GO1' allows you the freedom for self-paced, flexible study over a 12-month period. Access to all online materials will expire after 12 months unless prior arrangements have been made through FIA. Should extended online access be required, additional fees will apply. Please refer to page 12.

A tutor will be allocated to each student upon enrolment. The tutor's role is to guide you through the course content and assess your assignments. All students should log into the e-learning platform at least once a week for current and updated information, feedback and messages from tutors and/or FIA staff. Discussion may also take place via a tutor's contact email.

Course Structure and Requirements

The *Diploma in Fundraising* will take 12 months to complete.

To ensure you are not placed at a disadvantage, you should have a good command of written and spoken English to complete assignments. You should also be able to follow academic conventions.

The course covers a wide range of areas, with each module being applicable to the work of fundraising professionals. The content includes a variety of rich learning experiences.

Attainment requires the completion and assessment of 12 modules, comprising of 10 core modules and two elective modules, chosen from the list below.

Each module's duration is approximately 10 hours of reading, study, reflection and assignment tasks based on approximately six hours of study and four hours to complete the assignments.

Participants require access to the internet to log in to the e-learning platform 'GO1', which provides essential online course materials and resources. Sufficient data space is required for resource usage and downloads (approx. 200MB).

Course Content

Core Modules

(*you are required to complete all 10 of these modules*)

- Fundraising Strategy
- Fundraising Legislation
- Ethical Frameworks
- Direct Response Strategy
- Using Offline Fundraising Channels

- Using Online Media
- Major Gifts
- Bequests (Gifts in Wills)
- Corporate Fundraising
- Trusts and Foundations

Elective Modules

(*you are required to complete two of the modules below*)

- Leadership and Influence
- Team Dynamics
- Measuring People Performance

Time Frames

The following table is a guide for how long the course and each module will take you. Please remember that your online access period of 12 months will require you to complete one module per month. This includes the 10 core modules and two elective modules.

Study time	Days per module	Months to finish the Diploma
10 hours per module	1-month (30) days to complete each module	12 months to complete full course

While there are no set due dates for assignments to be completed and submitted to your tutor for assessment, we encourage you to submit them within the month you complete your tutorial, while information is still fresh in your mind.

Core Module Content

The following section outlines, in more detail, the content of each module within the Diploma.

Modules 2 through to 11 are to be completed and submitted for assessment.

Module 1: Introduction to the Diploma in Fundraising

This module outlines the core components of FIA's Diploma in Fundraising. It provides an overview of the Diploma content, course delivery and structure, course commitment and expectations, course assessment, and course tutors. This module also navigates participants through the e-learning system – GO1. The resources within this module include the *Student Guide*; *GO1 E-Learning Platform User Guide; Guidelines for Submitting Written Assignments,* and the *Course Evaluation & Completion Declaration Forms*.

Module 2: Fundraising Strategy

This module is a comprehensive overview of what is needed to develop an effective fundraising strategy. It explores the concept of charitable purpose and fundraising activities, provides an analysis of the state of fundraising in contemporary Australia, and gives insights into how and why people and organisations give. There is specific information about developing an effective mission statement and the relevance of mission statements to fundraising. There is a guide for planning a fundraising strategy, and it explains how to carry out a fundraising audit. The module also covers setting objectives, measurement and the evaluation of fundraising programs. Last but not least, this module delves into setting key strategies, competitor analysis, product positioning, and developing a case for support.

Module 3: Fundraising Legislation

All fundraising in Australia must be carried out in accordance with relevant legislation and within an ethical framework. This module gives a comprehensive overview of the State and Commonwealth laws covering the most important aspects of fundraising. The module includes detailed reference to Australian privacy legislation, as it applies to the fundraising sector. There is a broad overview of tax laws, relevant to not-for-profits.

Module 4: Ethical Frameworks

Because fundraising operates on trust, maintaining the highest ethical and legal standards is essential. This module gives an overview of the ethical and policy environment within which fundraising is practiced in Australia. The scope and application of the FIA Code is explained. Topic areas covered include: Ethical Conduct, Donors, Vulnerable People, Beneficiaries and Suppliers. Examples of appropriate and inappropriate behavior and practices are explored.

Module 5: Direct Response Strategy

Direct response marketing is at the core of most successful fundraising strategies. This module explores the often-useful model of the donor pyramid in modern fundraising. It includes an overview of financial aspects including the cost and income ratio of campaigns and the lifetime value of a donor. The relevance of the donor journey for fundraising planning and measurement is explored, along with matching the appropriate channels and content to the donor journey. Participants will learn about managing, using and analysing data to drive fundraising activities, as well as testing performance; what to test and how.

Module 6: Using Offline Fundraising Channels

Targeted, effective communication, using both offline and online channels, is essential for effective fundraising. In this module, participants are given an overview of the use of offline communication channels as part of the donor journey. You will review guidelines on composition, targeting and benchmarks for response for direct mail, why and how to use the phone for fundraising, face-to-face fundraising, dealing with negative perceptions of face-to-face and how to motivate staff. This module also delves into non-personalised offline channels including print, TV, radio and outdoor advertising.

Module 7: Using Online Media

How do online channels fit together? This module gives a complete overview of the online channels available and how to integrate them for fundraising success. This includes targeting the different kinds of on-line donors and developing personas, creating a good website user experience and tips on using paid search and search engine optimisation (SEO). Participants will discover tips for online display advertising, how to optimise each stage of email fundraising, testing and evaluation, and how to use social media for best results. An overview of crowdfunding and adapting to opportunities for mobile and the use of apps are also covered in this module.

Module 8: Major Gifts

Conducting successful major gift campaigns is a specialised element of fundraising. This module will equip participants with the skills they need to run a major gifts campaign. It includes an exploration of the typical profile of a major donor, the development cycle for major donors and the specific stages of a major gifts campaign. Participants will focus on donor engagement including:

- types of activities
- preparing for a meeting
- the anatomy of a meeting
- closing the gift and,
- how to manage the relationship after the gift and how to prepare for the next cycle of giving.

Module 9: Bequests (Gifts in Wills)

Bequest Giving or 'Gifts in Wills' is of significant value to not-for-profit organisations in Australia. They represent 20 per cent of charitable giving. This module discusses the status and importance of bequests in the Australian context. This includes the type of person who leaves a gift and their motives; how to ask people to consider leaving a bequest, and the types of gifts in wills as well as the information about wills that is available to the public. Other topics covered include identifying donors most likely to leave a bequest, communication tips, and 'In Memoriam Giving'.

Module 10: Corporate Fundraising

Corporate fundraising is very broad in scope and is a growing source of funds, goods and services in kind for not-for-profit organisations. This module delves into the status and trends in corporate giving. Corporate giving can take many forms, the main ones are covered in this module. These include cash, stocks and shares; publicity; gifts in kind and staff time; sponsorships and licensing; workplace giving and employee fundraising; as well as the growing area of cause-related marketing. Participants will glean invaluable information on how to identify organisations that are potential corporate givers or corporate partners, who to talk to in organisations, and how to tailor your approach.

Module 11: Trusts and Foundations

This module gives a comprehensive overview of all aspects of raising funds from Trusts and Foundations (T&Fs). Participants will understand the different types of T&Fs, their size within Australia, and how they are influenced by economic conditions. This module identifies the main focuses of T&Fs and the specific areas of need that they support. Detailed information is given on:

- successful grant application writing
- how to maintain a continuing relationship with T&Fs is shown in detail
- the challenge of sustainability when relying on grants for funding and,
- how to use grants to your best advantage.

Elective Module Content

Choose any two of the three electives below, to be completed and submitted for assessment.

Module 12: Leadership and Influence

This module shows the importance of good leadership in a fundraising context. Professional fundraisers are called upon to show leadership to staff, volunteers and, in some cases, donors. This module will also equip fundraisers for a leadership role. Participants will begin to understand the basic principles of leadership and what defines a good leader. Various models of leadership styles are shown in detail, and the difference between leadership and management is explained. Participants will be able to learn how to apply various theories of leadership and will gain an understanding of the unique challenges of leadership in a fundraising context.

Module 13: Team Dynamics

This module provides useful information about groups and teams and how to develop high performance teams in a fundraising context. It delves into the different types of teams and how they work, and the steps involved in the development of teams within an organisation. Using proven management models for team development, participants will be introduced to the dynamics of teams. This includes understanding the size and distribution roles within groups; how to assemble a team for a specific purpose, and how to identify the factors affecting team performance. This module will help participants identify conflict when it occurs and learn how to apply various methods to manage conflict in a team.

Module 14: Measuring People Performance

This module provides invaluable insights into managing your own workplace performance and the performance of others. Participants will complete this module with an understanding of the main reasons people stay in or leave an organisation. The theories of motivation that apply to organisations are explored in depth. You will be able to identify the different types of performance appraisals and their pros and cons. It includes practical information about conducting or participating in a performance appraisal. You will be made aware of the key considerations involved in the appraisal procedure for both appraisers and staff members.

Course Materials

After enrolling, you will receive:

- A welcome email
- URL link and login details for the student access point of the e-learning platform
- Details of your assigned tutor
- Diploma in Fundraising textbook: Weinstein, Stanley. *The Complete Guide to Fundraising Management*. 3rd ed. 2009. (will be sent to you by post)

Once you have logged into the e-learning platform you will find an introduction to the Diploma in Fundraising in Module 1. The following online resources will also be provided:

- Diploma in Fundraising Student Guide
- GO1 E-Learning Platform User Guide
- Guidelines for Submitting Written Assignments
- Course Evaluation & Completion Declaration Forms.

The following online course materials and resources will be provided when you log into Modules 2 through to 14:

- Online Tutorial
- Required Readings
- Wider Readings
- Assessment Instructions
- Assignment Question & Answer Template.

FIA's Bookshop

The FIA Bookshop offers students an ever-changing selection of industry appropriate books from a wide selection of authors. Students can purchase books from FIA at **25 per cent off** the recommended retail price.

To view our Books of the Month or to place an order, visit FIA's website **www.fia.org.au** and click *Resources* to access the bookshop. Books are generally available within two to six weeks of ordering, depending on supplier stock levels. You will find books in the following categories:

- CFRE Reading List & Comprehensive Fundraising Resources
- Data Analytics, Impact on Non-Profits & How to Use it to Your Advantage
- Donor Relations and Stewardship
- Fundraising and Non-Profit Ethics
- Fundraising Programs, Foundations and Appeals
- Grants and Writing Grant Applications
- Leadership and Business Skills
- Law and The Economy
- Major Gifts, Bequests, Capital Campaigns
- Marketing, Media, Communications
- Non-profit strategy, Sustainability and Impact.

FIA's Library Resource Centre

- FIA operates an extensive Library Resource Centre for the use of its members, and students. Visit FIA's website **www.fia.org.au** under *Resources* to access the library catalogue and request titles for loans.

Diploma Tutors

Upon registration, you will be assigned a tutor who will guide you throughout the course. Your tutor will answer all course content related questions and will assess your assignments.

FIA's two distance education tutors are highly regarded, skilled and experienced professional fundraisers. Both are Fellows of FIA (FFIA) and hold the Certified Fund Raising Executive (CFRE) credential.

Margaret Scott FFIA CFRE MBA

For almost 30 years Margaret Scott has been a fundraising leader. She is a past Chair of FIA, a Fellow of FIA and maintains CFRE status. In 2014, she was awarded the Arthur Venn Fundraiser of the Year and has been a tutor with FIA's Diploma course since its inception. Margaret has completed two postgraduate degrees majoring in fundraising from QUT and considers herself to be a 'lifelong learner'.

Chris Benaud FFIA CFRE MPRIA BA (Communication) MA (Communication Management)

Chris Benaud is a highly experienced fundraiser who has worked for leading not-for-profit organisations. He has been involved with FIA training programs since 1998. A Certified Fund Raising Executive (CFRE) and Fellow of FIA, Chris's qualifications include a BA, MA, and Cert IV - Workplace Assessment and Training.

Course Administration Support

FIA has full-time education staff who are here to help you with your learning needs. If you require help, please contact them during business hours (9am-5pm) on 1300 889 670 or by email: training@fia.org.au

Course Assessment

The *Diploma in Fundraising* course is competency based, meaning that you will need to demonstrate proficiency and understanding of all questions in an assignment to succeed, rather than achieve an academic grade. There are no exams, assessment is performed against a set of standard criteria, and not judged against the work of other students.

Because the Diploma is competency based, you can resubmit a reworked assignment if competency is not met on initial submission. Your tutor will guide you through this process.

The following section outlines the Assessment Requirements and Process.

Assessment Requirements

Each assessment (assignment) is designed to test a student's comprehension of the material covered in the module and your ability to apply learnings in the real world. You should draw on the content covered in the tutorial, the required readings, wider readings and the course text book. You should not restrict yourself to these resources. If you have access to other relevant sources which will add depth or clarity to your answers, you are encouraged to use them. You can also access further material through the FIA Library and Bookshop. Refer back to pages 8 and 9 of this guide for more information on these.

Readings and Assessment

The module readings are an integral element of the learning experience and tutors will be seeking evidence of your reading in your assignments. They will also look for evidence of your ability to reflect on the readings and to test the concepts against the reality of the workplace.

Editing and Proofreading

Carefully edit and proofread your assignment answers. Leave a few days after you have finished a final draft before you proofread and do a final edit. It is difficult to pick up mistakes when you have not had time to distance yourself from the assignment. If possible, ask someone else to read it. This will give you an idea of whether it is clearly written.

Plagiarism

Plagiarism is the practice of claiming or implying original authorship of (or incorporating material from) someone else's written or creative work, in whole or in part, into one's own without adequate acknowledgement. Most instances of plagiarism are unintentional, so the use of appropriate referencing will help to ensure that unintentional plagiarism does not occur. Sources must be referenced when you quote, copy, paraphrase or summarise another author's work.

Referencing

You are required to reference each assessment before submitting. The preferred referencing style is the American Psychological Association (APA). You will find detailed guides online explaining how to reference, referencing generators and software etc. There are a number of different referencing styles, if you would prefer to use one other than APA please make sure that all referencing is consistent across all assessment submissions. A set of *Guidelines for Submitting Written Assignments* has also been provided for you in the Resource section of Module 1.

Assessment Process

It is important that you address each aspect of every assignment question. We would suggest that you familiarise yourself with each module's assignment questions before starting the tutorial, then spend time considering these in terms of what you have learnt through the tutorial and resources. This will help you to focus on the required elements for assessment.

Your tutor will help guide you through the assessment process as well as mark your work. And remember: you can resubmit your work if necessary, to demonstrate competency.

When you submit your assignments to your tutor, they will take responsibility for assessment. This ensures that the person most closely associated with you during the course will also measure your performance.

Assignments:

All assignments (which you can start, save and return to at your convenience), must be submitted through the assignment section of the corresponding module via the e-learning platform. Marking turnaround time is approximately three weeks.

Before starting your first assignment:

1. Read the ***Instructions for Assessment Completion*** contained within each module's resource section.

2. Read through the ***Assignment Questions.***

3. Read the ***Required Readings*** and ***Wider Readings.***

4. Refer to the APA referencing guide or the ***Guidelines for Submitting Written Assignments*** (in Module 1). It is important that all written work submitted is at an appropriate standard for those undertaking the Diploma in Fundraising. These guidelines will assist you in presenting work that will clearly show your level of learning, make it easier for your tutor to mark, and follow academic conventions. The guidelines should be read before beginning your first assignment and as required for each subsequent assignment.

5. Each module provides its own unique ***Assignment Question & Answer Template*** document. Download the ***Assignment Question & Answer Template*** and **SAVE AS**: *Your Name_Module No. Assessment*

6. Each ***Question & Answer Template*** includes a box at the top for you to type in your full name. Use the **Answer Box** provided for each question (remember that all questions must be answered for the purpose of assessment).

7. Ensure that you answer each part of the question.

8. Clearly label each part of your response, using numbers and subheadings, if required.

9. Cite all references at the end of each question and refer to the guidelines as needed.

10. Provide a **Word Count** at the bottom of each answered question (not including references).

11. Proof and edit your work.

12. **Read** and **complete the *Declaration*** statement at the bottom of your **Assignment Document.**

13. **Upload your Assignment Document** through your dashboard and submit to your tutor for marking.

14. Your tutor will notify you once they have completed marking your assignment, generally within three weeks of submission.

15. Once you have completed and passed each assignment the assignment status bar to the right of the assignment section of the module will show up as **PASSED**.

16. There may be a time where you tutor feels that the assignment you have submitted needs further clarification, work or amendments. In this case your assignment will be sent back to you for further work. These will show up as a **REDO** along the right hand side of the assignment section of the module. They should be re-submitted as soon as possible (preferably within the week, while information is still fresh in your mind).

17. It is important to keep a copy of all the work you have submitted.

Assessment Appeals

If you feel that your assessment has not been fair, or you wish to dispute any area of your assessment, your first approach should be to your tutor. It is more than likely that the issue can be easily resolved on a one-to-one basis.

Any student can register a query about an assessment by following these steps:

Step 1:   Approach your tutor with your query and explain as clearly as possible your reason for your dissatisfaction.

Step 2:   Your tutor will reassess your work within two weeks (or unless otherwise specified) of your appeal.

Step 3:   If you are still not satisfied with the reassessment then you should make a written request for reassessment to the Education and Training Team via training@fia.org.au
In your written request, outline clearly your reasons for being dissatisfied.

Step 4:   A second tutor will review your disputed assessment.

Step 5:   The second tutor conducts an assessment within three weeks (unless otherwise specified) of advice from FIA.

Step 6:   If you are still dissatisfied with the result of your assessment, you should write to the Education and Training Team at training@fia.org.au. You will need to outline as clearly as possible the reasons for your dissatisfaction.

Step 7:   FIA will arrange for an independent review of your complaint. You will receive a written statement of the process and outcome.

Online Course Extension Policy

Student Obligations

Time management is an important attribute for professional fundraisers. While there are no <u>due</u> dates for assignment submission, students are encouraged to submit their work within the month of completing each module. For attainment, all assignments must be submitted prior to the end of the 12-month access period.

If a student, due to <u>unforeseen</u> circumstances, is unable to submit all required assignments for assessment within the 12-month period, they will need to apply for an extension (explained below).

Extensions

If you are unable to complete the whole course within the 12-month access period, you **MUST** make an application for an 'extension' to training@fia.org.au. Late applications may be rejected. A free extension period can be offered up to, but not exceeding, the one month grace period. Further time extensions will result in access and administration fees being applied.

Extension Fees

3 months: $250

Notification

Students and their tutor will be advised of approval, or otherwise, of extensions via email. If a student has not received a response within five days, they should contact the Education and Training Team immediately by phone on 1300 889 670. FIA will keep assessment records, including extensions approvals, for each student electronically.

Appeals

If a student believes they have been unfairly dealt with in regard to an extension, they may appeal to the FIA Education and Training Team (1300 889 670).

Course Withdrawal

A student who opts to withdraw permanently from the Diploma in Fundraising having not completed the course must inform FIA's Education and Training Team in writing by email. Where a student ceases without notice to submit work or participate in learning activities they will be deemed to have withdrawn from their course and will be automatically unenrolled from the e-learning platform and course.

Privacy

FIA retains information about students and their learning, this is kept confidentially with staff and tutors of FIA. At any time a student can request the information from FIA.

Record Keeping

FIA will keep assessment records, including extension applications and approvals for each student, on file indefinitely.

Course Evaluation & Completion Documentation

To ensure we continue to offer relevant and interesting professional development opportunities, we would appreciate your feedback. All comments will remain confidential.

1. Please ensure you download the **Course Evaluation & Completion Declaration Forms** and complete the corresponding feedback section at the conclusion of each module.

2. The completed **Course Evaluation & Completion Declaration Forms** must be submitted once all core modules and chosen electives have been passed. Failure to forward the completed forms may result in the delay of course completion requirements.

Graduation

You will be presented with a FIA *Diploma in Fundraising* at the successful conclusion of your studies.

Your Diploma will be presented to you at a professional development event in your State or mailed to you. For more information about graduation, please contact FIA.

Supporting Student Needs

The requirements of individual students are considered by FIA staff and tutors wherever possible. FIA support diversity by:

- recognition of students' particular needs and circumstances, including, but not limited to: cultural and ethnic background, beliefs and religious practices, language and communication styles, physical and/or psychological requirements, and learning styles and preferences

- organising and monitoring equitable access to, and participation in, activities and,

- helping students to access organisations that provide specialist services, if required, to facilitate learning.

Course Fees

By enrolling and paying your registration fee, you are committing to a place in the *Diploma in Fundraising* course. On acceptance of your registration, your place in the course will be confirmed, and payment will be processed before commencement.

Course fees must be paid in full, prior to course commencement.

Course fees, including GST, are as follows:

Member:	$3,985
Staff of an Organisational Member:	$4,510
Non-Member:	$5,090

Cancellation & Refund Policy

Only under exceptional circumstances and on a case-by-case basis will requests for withdrawal or cancellation be considered, once payment has been made.

In the event a student does need to withdraw from the Diploma **prior** to gaining online access and starting the course, a full refund minus the administration charge of **$125** will be approved.

No refund is offered once online access has been established and the course started.

Should a student withdraw from the Diploma once starting, for any reason, **no substitute** or **replacement** student can join in their place.

All requests are to be made in writing and emailed to the FIA Education and Training Team at training@fia.org.au.

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FIA's Diploma in Fundraising
Course Extension Form

Please fill out the details below and email or fax back to FIA.

STUDENT NAME		DATE
COURSE CODE	**MODULE NAME**	**ORIGINAL DUE DATE**
	TUTOR NAME	**REQUESTED DUE DATE**
REASON FOR EXTENSION		
STUDENT SIGNATURE		

OFFICE USE ONLY	STUDENT NOTIFIED	TUTOR NOTIFIED
EXTENSION GRANTED	**AUTHORISED BY**	**REVISED DUE DATE**