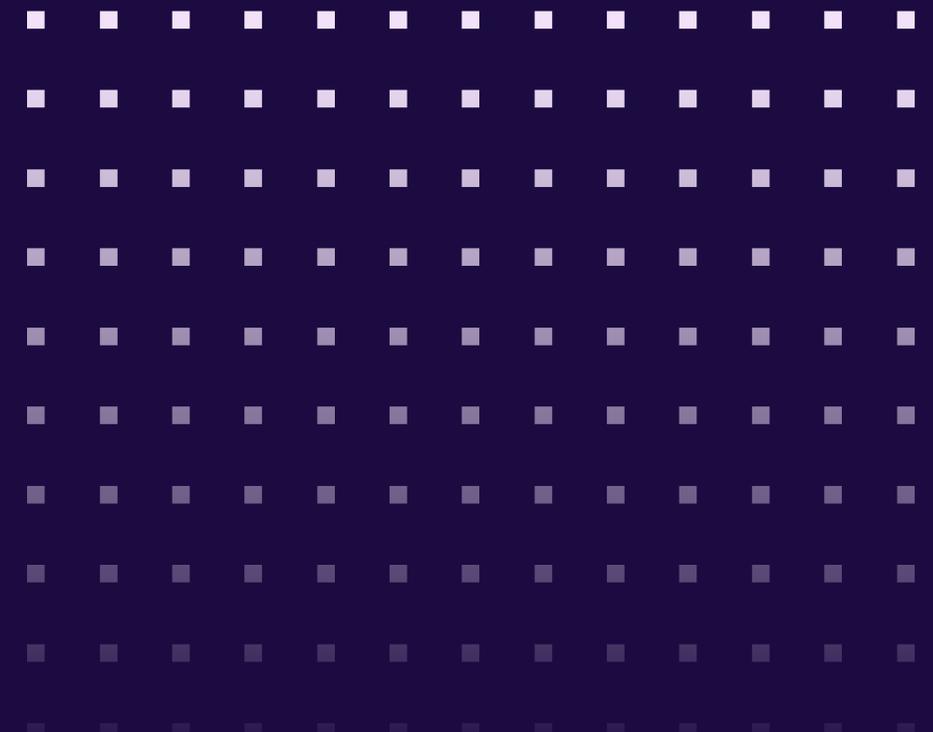


Fundraiser

Level 3

Programme handbook



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Welcome to the Fundraiser Level 3 Programme



This programme will cover:



Analysing the fundraising landscape and psychological giving drivers



Combining the art of influence with a structured blueprint for success



Managing supporter data alongside budgets and monitoring.



Aligning outreach efforts with core fundraising goals



Evaluating performance and exploring cross-sector revenue



Moving from theory to active, real-world fundraising

Course cost:

£8,000

Programme duration:

13 months + 12 week
Apprenticeship Assessment

Live training sessions:

10 days

Apprenticeship Standard

UNIT 01

Understanding the Fundraising Landscape

 **Live training sessions:** 2 x ½ day

Understanding where your organisation fits within the Charity Sector is key to starting your fundraising journey. You will explore the sector, be aware of key external and internal influences, and the broader fundraising environment. Factors affecting fundraising performance, including market trends and collaboration opportunities along with organisational structures. Fundraising Methods, Income Streams, and Applications. Ethical and Inclusive Fundraising Practices. Building Connections and Taking Initiative.

Topics covered:

- Understanding the Fundraising Landscape
- Fundraising Methods, Income Streams, and Applications
- Ethical and Inclusive Fundraising Practices
- Building Connections and Taking Initiative

UNIT 02

Understanding Donor Motivations

 **Live training sessions:** 2 x ½ day

Different donors have different reasons for giving. Understand the key factors that influence donor motivations and how these impact their behaviour. The psychology of giving: emotional, social, and practical motivators. How values, beliefs, and personal experiences shape donor behaviour. Creating Connections: Engaging and Communicating with Donors. Learn techniques to build rapport, communicate effectively, and adapt messaging to donor preferences including personalised stories.

Topics covered:

- Donor Motivations
- Creating Connections

UNIT 03

The Art of Persuasion

 **Live training sessions:** 2 x ½ day

Introducing the fundamentals of creating a case for support, including matchmaking organisational aims and values with donor motivations and showcasing impact. You will work through successful cases for support with breakdowns of why they work. This unit emphasises the importance of data-driven storytelling and presenting information persuasively to inspire action.

Topics covered:

- Building Authentic Connections
- Creating compelling cases
- Strategic Communication
- Empowering Fundraisers as Storytellers

UNIT 04

Blueprint for Success

 **Live training sessions:** 2 x ½ day

A well-structured fundraising plan is critical for success. Understand the purpose and importance of this in achieving organisational goals. What is a fundraising plan, and why is it critical for success? Learn how to use data and insights to inform and strengthen fundraising plans. You will explore strategies for engaging stakeholders and communicating effectively to ensure the plan's success.

Topics covered:

- Fundraising Fundamentals
- Data-Driven Strategies
- Collaboration and Stakeholder Engagement / Interactive Application

UNIT 05

Managing Support Data

 **Live training sessions:** 2 x ½ day

In this unit you will understand the importance of support data and the types of data available to fundraisers. Overview of support data type including CRM data, social data, Smee and Ford Legacy data, and other fundraising impact, considerations and compliance in data handling. You will explore how to turn data into actionable insights for fundraising campaigns, aligning data insights with strategic goals to maximise impact.

Topics covered:

- Introduction to Support Data
- CRM Systems and Data Integration
- Analysing Social and External Data
- Collaborative and Data

UNIT 06

Fundraising Budgets and Monitoring

 **Live training sessions:** 2 x ½ day

In this unit you will understand the basics of creating and managing a fundraising budget. What is a budget, and why is it critical to fundraising success? Learn how to monitor financial performance and ensure funds are used effectively. Discover tools and techniques for tracking income and expenditure. How to evaluate performance against budgets. Learn how to report and present financial data to stakeholders.

Topics covered:

- Introduction to Budgeting
- Monitoring and Reporting
- Application & advanced Discussion

UNIT 07

Fundraising and Communication Strategy

 **Live training sessions:** 2 x ½ day

You will explore how to develop integrated fundraising and communication strategies that align with organisational goals, engage stakeholders, and drive results. Learn how to communicate effectively with diverse stakeholders, tailoring communication for different audiences.

Topics covered:

- Strategic Planning
- Communication techniques

UNIT 08

Fundraising Audit

 **Live training sessions:** 2 x ½ day

This unit focuses on conducting a comprehensive fundraising audit to evaluate performance, identify strengths and weaknesses, and recommend improvements. Understand the purpose and components of a fundraising audit and why is it valuable? Learn how to present audit findings to stakeholders, tailoring communication for all involved.

Topics covered:

- Fundamentals of Fundraising Audits
- Data collection and analysis
- Identifying strengths and weaknesses
- Developing an audit report

UNIT 09

Cross-Sector Income Generation

 **Live training sessions:** 2 x ½ day

Learn the value of partnerships across sectors for income generation and discover their impact. How to develop strategies for building and maintaining cross-sector relationships. How to leverage frameworks and metrics such as Employee Living Gains, explore how emerging frameworks can drive income, the introduction to social impact metrics and their application in partnerships.

Topics covered:

- Understanding Cross-Sector opportunities
- Building Partnerships
- Leveraging frameworks and metrics

UNIT 10

Fundraising in Action

 **Live training sessions:** 2 x ½ day

This final unit allows you to apply all the knowledge and skills developed throughout the programme. Understand how to implement fundraising strategies effectively. Engage Stakeholders, build relationships and ensure collaboration in fundraising efforts. Learn how to monitor progress and adapt strategies on the go and how to deal with unexpected challenges.

Topics covered:

- Applying fundraising strategies
- Engaging Stakeholders
- Monitoring and Adapting



Fundraiser Level 3 Learner journey

Month 1
Understanding the Fundraising Landscape

Month 3
• The Art of Persuasion
• Progress Review

Month 5
• Managing Support Data
• Coaching Session

Month 6
• Fundraising Budgets and Monitoring
• Progress Review

Month 7
• Fundraising and Communication Strategy
• Coaching Session

Month 12-13
Gateway Exit Review

APPRENTICESHIP ASSESSMENT

Month 8
• Fundraising Audit
• Coaching Session

Month 9
• Cross-Sector Income Generation
• Progress Review

Month 4
• Blueprint for Success
• Coaching Session

Month 2
• Understanding Donor Motivations
• Coaching Session

Month 10
• Fundraising in Action
• Assessment Readiness

Month 11
• Preparing for Gateway
• Coaching Session

The programme

Apprenticeship assessment overview

- **Ongoing Assessment:** Progress is tracked throughout the apprenticeship using our digital platforms, with learners building a portfolio of evidence as they develop new skills and knowledge.
- **Apprenticeship Assessment:** At the end of the programme, learners complete the below.
 - Apprentices will prepare and develop a case for support pitch, presentation with questions and answers to an independent assessor.
 - Professional discussion to an independent assessor (underpinned by their portfolio of evidence).
- **Outcome:** Successful completion leads to a nationally recognised qualification.

Virtual learning session

All live training sessions are delivered online using Microsoft Teams.

Microsoft Teams provides a reliable and accessible virtual learning environment that supports live teaching, discussion, collaboration, and interaction throughout your programme.

To take part in live sessions, you will need to ensure that:

- You can access Microsoft Teams via your web browser or desktop app
- You have a working microphone and camera
- You are able to join sessions from a suitable, quiet environment

Joining links will be shared in advance via calendar invitation and/or your programme schedule.

If you experience any technical issues or need guidance on using Microsoft Teams, your coach can provide support and direct you to appropriate resources.



Qualification

On completion of the programme, you will be awarded a Level 3 Fundraiser Apprenticeship

Apprenticeship Standard



Off-the-job hours

As a working professional, learners will integrate their apprenticeship learning with their existing role, dedicating contracted working time to off-the-job development. This flexible training is delivered through a blended approach, including focused live classroom days, personalised coaching sessions, e-learning modules and practical applied learning activities designed to reinforce and extend their expertise.

The employer will work in partnership with Apprentify to ensure that the required off-the-job hours are achieved in a way that complements the learners ongoing responsibilities. Progress is tracked via the Bud digital platform and they will be supported by their Development Coach and line manager to balance apprenticeship commitments with their day-to-day work priorities.

What counts towards off-the-job hours?

Off-the-job hours are simply time spent learning new knowledge, skills, or behaviours that directly relate to the apprenticeship - while at work. This doesn't have to be separate from the usual responsibilities; in fact, many activities the learner already does can count, as long as this development is in line with the apprenticeship standard.

To recognise off-the-job hours, consider:



If the answer is yes to these, learners can record their activity as off-the-job hours. Like shadowing a colleague, attending a relevant meeting, or working on a project that stretches their skills can all count - making it easy to capture their development as part of their everyday work.

The expectations listed are necessary for all parties to ensure that the learner completes their programme.

Learner



- Preparation and planning for coaching/classroom sessions
- Attending all virtual classrooms and coaching sessions
- Completion of tasks in the agreed timeframe
- Planning 20% off-the-job training and completing Bud activities
- Taking responsibility for their own development
- Communicate support needs to their line manager and Development Coach
- Update their Self-Study Log with the extra training they complete

Development Coach



- Providing teaching and coaching sessions
- Monitoring progress using Bud and gaining feedback from line managers
- Coaching apprentices with both programme and workplace-related skills
- Feedback to drive enhanced performance and improved knowledge
- Online support through regular meetings
- Marking and assessment of Bud work
- Preparation for Apprenticeship Assessment

Line Manager



- Facilitate time for the apprentice for their learning in working hours
- Monthly one-to-one reviews with learners to discuss progress, provide feedback and guide development
- Provide opportunities for learners to participate in relevant workplace tasks related to their apprenticeship standard
- Keep in regular contact with the apprentice and Development Coach
- Provide learning opportunities

Trainer



- Identify support needs prior to the programme
- Provide high-quality skills based virtual classroom training
- Provide assessment for learning activities
- Provide learning resources to enhance the embedding of skills
- Support practical application



Safeguarding and inclusion

British values

Rule of Law

Rules promote a happy, safe and secure living and working environment. Examples are:

- Legislation
- Agreed procedures, policies and ways of working
- Codes of conduct
- How the law protects you and others

Individual Liberty

Protection of your rights and the rights of others you work with. Examples are:

- Values and principles
- Individuality, consent, choice and rights
- Dignity and respect
- Equality and human rights
- Personal and professional development

Democracy

Everyone should be aware of their rights and responsibilities that help to build a culture of freedom and equality. Examples are:

- Team meetings
- Joint decision-making
- Receiving and giving feedback
- The right to protest and petition
- Leadership and accountability

Respect and Tolerance

Respecting the ideas, beliefs and values of others while not imposing our own on others, including:

- Tackling discrimination
- Tackling bullying
- Embracing diversity
- The importance of religion, traditions, preferences and cultural heritage
- Recognise stereotyping, prejudice and labelling

Safeguarding and prevent

Apprentify has a statutory requirement to ensure that all our apprentices are safe from harm and can learn in a secure environment. This is a responsibility of everyone involved in the programme, including employers and apprentices.

Safeguarding does not simply refer to physical harm. It can also be far less obvious and harder to recognise – abuse, neglect and wellbeing concerns are all examples of safeguarding concerns that you should be aware of and know how to respond to, both on behalf of yourself and on behalf of others.

The Prevent duty is part of the UK Government's Counter-Terrorism Strategy (CONTEST) and is designed to stop people from becoming terrorists or supporting terrorism. It is a requirement of numerous public-facing bodies, including apprenticeship training providers, to develop knowledge of the signs of radicalisation and to ensure that learners understand how to report their concerns.

What does this look like in my programme?

Your Development Coach will support you and your employer in building awareness and applying safeguarding and Prevent in the workplace and in modern Britain. This will involve:

- Discussions during progress reviews
- Activities in virtual classrooms
- E-learning courses
- Real-life scenarios in coaching sessions
- External courses for Action Counters Terrorism (ACT) Awareness

Our Safeguarding Officers

To find out who our designated Safeguarding Officers are, click on the link below.

[Safeguarding](#)

What do I do if I have any concerns?

If you have any concerns, you can confidentially contact the Apprentify safeguarding team.

Additional learning needs (ALN)

Cognassist

During the application process for apprenticeships, learners will complete a Neurodiversity Assessment, which will identify any neurodiversity needs. If the software identifies such a need, the learner will work with a dedicated Cognassist Tutor throughout the programme.

At the start of each month, learners will be provided with four strategies to support their learning and develop their understanding. Learners must aim to complete all four strategies every month. Once learners have completed the strategies, apprentices hold a monthly session with their Cognassist Tutor.

These are completed remotely with a Tutor, who will discuss each strategy and document feedback around the skills and actions, as well as the impact of, each module on Cognassist. While this is not mandatory, and you can opt out if you wish, this will support you with any identified learning needs throughout your programme.

Cognassist is a tool that assesses the neurodiversity of learners and provides strategies and activities for them to enhance their learning. Cognassist assesses capacity in the following domains:

- Verbal Memory
- Non-Verbal Memory
- Literacy
- Numeracy
- Visual Information
- Processing Speed
- Executive Function
- Verbal Reasoning
- Non-Verbal Reasoning



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