

Accident Prevention

The case for a qualifying pathway for fundraising and the most appropriate entry routes on to that pathway

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Rogare: The Fundraising Think Tank

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About Rogare

Rogare (Latin for ‘to ask’) is the independent think-tank for the global fundraising profession. We are the engine that translates academic ideas into professional practice, and we aim to bring about a paradigm shift in the way fundraisers use theory and evidence to solve their professional challenges.

All Rogare’s reports and outputs can be downloaded at www.rogare.net

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Foreword

The demand for fundraising talent across the charity and arts sectors remains stronger than ever. Organisations are looking for that rather elusive talent that can support the financial growth and sustainability of their charity with skill, knowledge and passion.

However, the routes into fundraising are patchy. Like many others, I became a fundraiser by accident. I took what I thought was a marketing director role within a charity which was in fact a crisis fundraising post. Being relatively early on in my career and with rent and bills to pay, I stuck with it, and found that I loved the challenge of fundraising. But I consider myself lucky to have found this path by accident.

Many sectors have well-established development pathways, with clear accreditation routes via learning and formal examinations - for example, in accountancy, medicine or marketing. In areas such as fundraising there is no 'obvious' or 'set' entry pathway. There is also no defined form of skills or knowledge acquisition either required or mandatory to perform a role - all are optional.

This can make defining a set of competencies or experience needed for fundraising roles almost impossible.

Do we rely on experience or track record? How do we assess whether someone's track record in another role makes them suitable to deliver in our environment?

This report from Rogare seeks to synthesize some of these issues and to give clear indicators of where the gaps are, how programmes might be designed to respond to them, and where new partnerships and collaborations need to emerge. If we are to retain fundraising talent across the charity and arts sectors, we need to urgently understand the training pathways and support that fundraisers need to succeed.

It's an important piece of work at a time of great challenge and change. At Cause4 and Arts Fundraising & Philanthropy we look forward to doing our bit, urgently and quickly, in order to respond to some of the report's important provocations.

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Executive summary

It would appear that fundraising is experiencing a market failure in fundraiser recruitment – there are not enough fundraisers with relevant skills and knowledge entering the profession – and research consistently highlights skills gaps in fundraising (Introduction).

Entry pathways need to be designed to rectify this situation, by equipping fundraisers with the skills and knowledge they need to practise competently through a qualifying pathway. Ultimately fundraising needs to follow other professions in providing a route to qualification (s10).

But there is currently no set or recommended entry route into fundraising (s2) and fundraisers enter the profession by one of three general and haphazard routes:

1. **Accidental** – no major decision to become a fundraiser; it just sort of happens (44 per cent, based on Breeze 2017)
2. **Gradual** – come to a decision to become a fundraiser over a period of time (42 per cent)
3. **Intentional** – make a deliberate decision to become a fundraiser as a first-choice career and work towards that (five per cent).

Further to these three overarching routes, several more specific routes can be ascertained:

- **Transfer from another sector** (gradual – i.e. probably most likely to be associated with a gradual route) (s2.1)
- **Direct entry by responding to job application as first career choice** (intentional) (s2.2)
 - Apprenticeships (intentional) (s2.2.1)
 - Graduate trainee schemes (intentional) (s2.2.1)
- **Internships** (intentional/gradual) (s2.3)

- **Voluntary role** (gradual/intentional/accidental) (s2.3)
- **University rag fundraising** (accidental/intentional) (s2.4)
- **Via face-to-face or other field force fundraising** (accidental/intentional/gradual) (s2.5).

In lieu of a set of recommended entry routes into fundraising, there is myriad advice about how to get into fundraising, some of which suggests the above routes, and includes things such as enhancing knowledge by taking a course, and building contacts (s2.6).

Because there is no set or recommended entry route into fundraising that is designed to equip a candidate with the skills or knowledge they need to do the job, recruiters cannot always use this as a criterion in assessing candidates. Entry requirements for fundraising are thus often expressed as behaviours/attitudes of candidates rather than what knowledge or skills they have, particularly:

- Be passionate
- Be authentic
- Have good interpersonal skills
- Be able to take pressure (s3).

Just as there is no recommended entry route into fundraising, neither is there a standard process by which new entrants to the profession can ‘qualify’ as fundraisers – i.e. to be signed off following a formal process as being sufficiently competent to practise (s4, s6).

Competence is the ability to perform tasks and roles to the expected standard, or a proven ability to use knowledge, skills and personal, social and/or methodological abilities in work or study situations and in professional and personal development (s6).

Nonetheless, there are ways for fundraisers to acquire knowledge and skills: none of these is presently a formal qualification to practise, even though some of them are professional qualifications – as Beth Breeze (2017, p72) says: “Informality remains the dominant motif of career entry and progression.”

The routes are:

- On-the-job learning (s4.1)
- Self-taught (s4.2)
- Mentoring (s4.3)
- Professional training (s4.4)
- Continuous professional development (s4.5)
- Professional qualification (s4.6)
- National Occupational Standards (s4.7)
- Certification/credentialing (s4.8)
- Higher (university) education (s4.9)
- Apprenticeship (s4.10).

There seems to be a prevailing attitude that a formal qualifying process for fundraising is neither necessary nor desirable (s9.4). The relevant question is whether ‘qualifying’ (i.e. going through a qualifying processes) as a fundraiser actually leads to better performance in the field. There is little research into this area, but what there is points towards the benefits of upskilling fundraisers through formal education and training designed specifically to prepare them to practise competently (s4.11).

While fundraising has no recommend entry or qualifying pathway, most professions do have such things, and it is their professional institutes that generally operate a system to sign off entrants as competent to practise. The structures and types of these qualifying pathways are outlined in s5.

Qualifying pathways generally use competence frameworks to assess individual professionals’ competence (s6).

The idea of ‘competence’ can be approached from two broad perspectives (s6):

- **Internal** – based on the attributes, skills, behaviours and knowledge of individuals, and so is ‘internal’ to the candidate professional: competence ‘belongs’ to the individual.
- **External** – based on activities and outcomes, and social context, and so is external to the candidate professional.

Internal models of competence can be further subdivided into:

- **Technocratic/instructional models** – which focus on the knowledge that people have, taught through a syllabus
- **Behavioural models** – aim to identify the behaviours, approaches and dispositions of superior job performers.

Summarising:

- Internal technical/instructional models are about what people know.
- Internal behavioural models are about what people are (in terms of fundraising, this could be authentic, passionate about the cause, etc.)
- External models are about what people can do.

Further, competence frameworks will either accredit/certify/qualify at a single job level, such as ‘fundraiser’ or ‘chartered fundraiser’; or they may have multi-level frameworks qualifying people at different levels of seniority/ability (e.g. basic to advanced).

The challenge for the fundraising profession is to create an entry/qualifying pathway for fundraising (s7) by adapting the components of such pathways described in ss5 and 6 and matching them to the existing entry routes to fundraising (s2), by incorporating and adapting the existing ways that fundraisers currently acquire professional competence (‘qualify’) (s4), while considering which are the most desirable

traits for a fundraiser to possess (s3). Doing this will give direction to all those who want to become fundraisers – meaning that no one in future need fall into the profession ‘by accident’.

This paper does not set out to design such a pathway, but it does make some suggestions about how it might be constructed:

1. First, it must accommodate all new entrants who are currently entering the profession via the routes described in s2.
2. It should equip people who have little or no prior experience of fundraising with the skills and knowledge they need to become competent at this role. An apprenticeship is one way to do this. Graduate entry schemes may be another route, notwithstanding the current debate about whether there should be degree requirements for some/most/all fundraising jobs (s8.3).
3. The pathway could be tiered, accrediting fundraisers at different levels, so that people entering the profession can choose different career paths from the very start, or adapt in mid-career to pick and mix the knowledge they need.
4. There should (probably) be an academic component for those who want to study the profession at these levels.
5. The qualifying pathway must also accommodate the very high numbers of people who transfer from other sectors. One option is to develop a system of Accreditation of Prior Experiential Learning, and to fill gaps in experience with conversion courses, which can also be developed for those entering the profession through routes such as interning, field-force fundraising, and student rag fundraising.
6. There should be no place for unpaid internships or volunteering (in the sense that being a volunteer is a formal – or even informal – part of the entry pathway, which would make volunteering just another form of

internship; however, voluntary work will always add value to an applicant’s CV).

It’s unrealistic to expect a pathway to be constructed all in one go, but it can be built piecemeal out of the components we already have and those that are coming on stream, such as the new apprenticeship standards (see s2.2.1).

However, a possible barrier to establishing such a pathway is what appears to be a somewhat prevalent attitude within the profession that it is neither needed nor desirable (s9.4). And so the fundraising profession needs to work together to achieve consensus on what type of pathway is needed and what benefits this would bring.

Finally, there are considerations about who to attract into any new entry and qualifying pathways and some issues surround this (s8). There are particular issues, debates and challenges that may influence the type of people the fundraising professions attracts into the qualifying pathway and how that pathway is constructed.

For example, there is a polarised debate about whether fundraising is an art or a science. If it is decided that a qualifying pathway needs to bring more ‘artists’ into the profession, then a behavioural competence model might be considered more appropriate for artistic skills and the current traits – such as passion and authenticity – considered desirable (see s3); whereas a technical or instructional model might be more appropriate for scientific skills (s8.1).

There is also a question of the attitudes towards the labour market of people applying to enter the fundraising workforce (s8.2). Research has identified two ideal types of graduate entrants (the research focused on graduates):

‘**Purists**’ – want to get a job by winning a meritocratic race and remain true to their own values.

'Players' – see the labour market as a “positional game” and package themselves to be the most employable versions of themselves; they will do research to try to “decode the winning formula” that will get them the job.

It may be inferred from the discussion presented in this paper that the fundraising profession would seek purist job applicants since their values align more closely with the charity sectors' values, and in the absence of a level playing field in skills and knowledge, it is such traits that are often considered most relevant in assessing candidates (see s3).

Sometimes, fundraising recruiters may be faced with a choice of:

- Purists without appropriate skills/knowledge.
- Players with some appropriate skills/knowledge

It is a valid inference from some of the arguments and evidence summarised in this paper that many fundraising recruiters would choose the unknowledgeable/unskilled purist over the knowledgeable/skilled player.

However, the promotion of factors such as passion for the cause and personal authenticity provides clues as to the “winning formula” that will get them a job in fundraising. Focusing on internal behavioural traits may inadvertently open the door to more players, since players are now able to fake what employers are looking for.

However, in jobs where technical expertise is required, “player tactics held little credence without a sound technical knowledge” (Brown 2005, p8).

The key to finding the right entrants to fundraising is the skills they have, which once again takes us back to the need to build a skills-/knowledge-based entry/qualifying pathway.

Introduction

The single biggest challenge facing the charity sector is a deficit of talent. So reckons Joe Jenkins, director of supporter impact and income at the Children's Society, trustee at Refugee Action, former chair of the IoF convention board, and a member of Rogare's International Advisory Panel (Jenkins 2018). While not wishing to resort to an argument from authority, if a sector luminary such as Joe Jenkins is of this opinion, then we ought to think about taking it seriously.

Jenkins says:

"The talent pool isn't growing anywhere near fast enough, or in step with the skills and capabilities we're going to need in the future...we are mostly all struggling with both the attraction and the retention of talent - in terms of capabilities, competencies, skills and attitudes - as well as performance management of those who fall short of what we need."

And what talent there is in the sector "isn't enough to go round" (ibid).

It is important to note that Jenkins is talking about the charity sector generally, not just fundraising. But in 2013, experienced fundraiser Lucy Caldicott - later a board member of the Fundraising Regulator - foreshadowed Jenkins' concerns, writing that "recruiting top fundraising talent is one of the biggest issues facing charities right across the income spectrum" (Caldicott 2013). Her claim is supported by research.

The Foundation for Social Improvement (FSI) consistently reports that the hardest vacancies to fill for small charities are fundraisers, with 28 per cent of such organisations reporting this difficulty in 2017 (FSI 2017, p8) and 23 per cent in 2018 (FSI 2019, p7). In both years, the next most problematic vacancy was volunteer managers, for nine percent of small nonprofits.

Back in 2007, a report by the NCVO's Workforce Hub found that 29 per cent of charities recruit staff they consider to be underskilled, with 25 per cent of organisations reporting skills gaps - defined as staff who are "underskilled" in their function - in their fundraising staff. Only IT (27 per cent) and legal (26 per cent) had higher skills gaps (Clark 2007, p7).

The FSI research shows that every area of fundraising needs some upskilling with the areas in most need being legacies, major gifts, corporate and digital/online, the four areas that have been consistently underskilled since FSI started the survey in 2010, and the proportion of organisations reporting lack of skills in these four areas has never dropped below 60 per cent. Only with trust, statutory and events fundraising did fewer than 50 per cent of small charities report they need "some" or "significant" upskilling. The discipline of fundraising scoring highest for "excellent" or "very good" skills is trust fundraising, reported by 36 per cent of organisations. But not a single area of fundraising has a score in double figures for "excellent" skills (FSI 2019, p16-17).

Bringing this right up to date, research by NCVO in 2019 also found substantial skills gaps in the voluntary sector workforce. Although this research did not specifically look at technical skills such as fundraising, it did find that the biggest skills gap, identified by 52 per cent of organisations, was "specialist skills or knowledge needed to perform the role" (NCVO 2019, p10); and that the main causes of skills gaps among staff are that their training has only been partially completed (60 per cent) and that they are new to the role (58 per cent), while being unable to recruit staff with the required skills comes in seventh at 23 per cent (ibid, p16).

In Scotland, anecdotal evidence also suggests a skills gap in fundraising, with employers finding it ever harder to recruit in a “candidate-short” market (Kernahan and Anderson 2017).

This is not just a problem in the UK. A survey of its national association members by the European Fundraising Association (EFA) in 2017 rated a shortage of skilled fundraisers as a concern (EFA 2017) while in a previous EFA survey in 2014, seven of the 17 participating national organisations reported that a shortage of fundraising skills was one of the three biggest barriers to successful fundraising (Breeze 2017, p5).

So both anecdotal evidence and received wisdom (e.g. Jenkins 2018) and various research (Clark 2007; FSI 2017, 2019; NCVO 2019) provide convincing reasons to believe that people are becoming fundraisers without the requisite skills (and we may also infer without the requisite knowledge) to perform their roles skilfully and competently. And once they are in their roles, there are questions about whether they are acquiring those skills. Jenkins (2018) talks about those staff whose performance falls “well short of what we need”, while the skills gaps identified by the research persist after fundraisers enter their profession. As has already been noted, the biggest reason for skills gaps recorded in the NCVO study is that training of current staff is only partially completed. But at third place in this list, reported by 30 per cent of organisations, is that staff have received training, but their performance has not improved sufficiently as a result (NCVO 2019, p6), which would suggest there is something wrong with the quality of the training, the quality of the staff member, or both.

So we do have a talent crisis in that the people coming into fundraising don’t have the appropriate skills (they are “new to the role”, as NCVO reported) and the people who are already in fundraising often are not acquiring the appropriate skills (the training they receive doesn’t improve their performance). In fact the first part of this – that people are entering

fundraising without necessary skills – could be hypothesised from first principles, since there are no entry processes for fundraising that are designed to provide them with these skills.

One way to analyse skill shortages or other issues in the labour market is to consider whether it is being caused by a market failure or a systems failure, both of which are a mismatch of supply and demand (Hurrell et al 2011, p340).

Market failure happens where there are too few workers in the labour market with the appropriate skills. There is an absence of trained workers and no training providers exist to provide relevant training, and/or employers are unwilling to train their staff (ibid).

Under a systems failure, there is an “apposite number of appropriately skilled” people in the labour market, but they are not being matched to the employers who need them (ibid).

However, fundraising’s talent crisis cannot be entirely due to a systems failure because most new entrants do not have relevant skills, which points us more toward a market failure, which is also what the evidence presented by FSI suggests.

What we appear to be confronting in fundraising is a market failure whereby people enter the fundraising profession without requisite knowledge and skills, so that “demand for experienced fundraisers seriously outstrips their supply” (Breeze 2017, p5), leading to a “candidate-short” recruitment market (Kernahan and Anderson 2017).

In the UK, and indeed, just about anywhere else in the world, a person can start a job as a full member of the fundraising ‘profession’ knowing absolutely nothing about fundraising. But they will never be required to take any course, engage in study, or take part in training designed to upskill them and some fundraisers “freely admit” to never having done any of this (Breeze 2017, p91). No-one will ever assess their competence. In that sense,

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they can never ‘fail’ as a fundraiser. The only way they can fail is through the job market by not getting a job because someone better does.

Fundraising competence is thus regulated by the market rather than assessment against standards. And yet since there appears to be a market failure in fundraising, the market is therefore failing to regulate competence and ensure high standards. Because demand for experienced fundraisers, even if their skills are lacking, outstrips their supply, the odds of them failing in the jobs marketplace are reduced.

There could also be a systems failure of sorts in that those fundraisers with the right skills are not be matched to the right organisations (for whatever reason). But the evidence is pointing us towards a market failure – a dearth of ‘qualified’ fundraisers – as the most appropriate working hypothesis.

So the profession of fundraisers needs new entrants. A report in 2014 for the Higher Education Funding Council of England (HEFCE) concluded the higher education sector would need to at least double, and preferably triple, the number of HE fundraisers by 2020, from its 2013 base of 1,842 – so at least 1,800 and possibly 3,600 new fundraisers, and that’s just in the higher education sector (More Partnership and Richmond Associates 2014, p26).

And there seems to be no shortage of people who are at least interested in a career in fundraising (even though there are many barriers to them pursuing such a career – see s9 for a discussion of some of them). Representative YouGov market research for the Institute of Fundraising in 2019 reported that 25 per cent of people said they were “interested” in a career in fundraising (which means 25 per cent of the UK population are interested in a career in fundraising, which seems a bit high), with more women than men expressing this interest; and those who had fundraised in the previous 12 months (presumably as a volunteer) substantially more likely to be interested in a fundraising career. There is also more interest among people under 34 (Institute of Fundraising 2019, p22).

But how do we ensure that the people who are recruited into the fundraising profession have the requisite skills they need to practise competently as fundraising professionals, thus closing the skills gaps in fundraising and solving the talent crisis by fixing the market failure in the fundraising labour market?

- What entry pathways ought we construct to deliver qualified fundraisers?
- How do we recruit people on to these entry pathways?
- And what types of people with what skills and qualities do we need to come through these pathways?

These are the questions this paper sets out to answer. This report will look at:

1. Whether fundraising is or is not a profession and what implications this has on what types of entry pathways it requires.
2. Describe the current entry routes/pathways to fundraising.
3. What are considered to be the desired or recommended qualities, traits or characteristics of entrants to the fundraising profession.
4. Outline the current options for 'qualifying' as a fundraiser – i.e. the formal or informal processes by which fundraisers can acquire the knowledge and skills they need to practise.
 - a. Included in this section is a look at whether 'qualification' makes for more successful fundraisers.

Having set the scene by looking at how fundraising fares, the report now turns its attention to how other professions prepare entrants for practice, based on the work done by Lester (2009a, 2009b, 2014).

5. What are the routes to qualification in the professions?
6. How is competence among candidate professionals assessed?
7. What is the appropriate qualifying pathway for fundraising?
8. How can we resolve the talent crisis – who should we be aiming to recruit? This section includes:
 - a. Discussion of whether fundraising is an art or science
 - b. What are the right attitudes of new entrants to the labour market
 - c. Whether a graduate entry programme is necessary or desirable.

9. What are the barriers to resolving the talent crisis?
 - a. Low pay
 - b. Poor perception of fundraising as a career by potential new entrants
 - c. Lack of promotion of fundraising as a career
 - d. Attitudes that a qualifying process is not required to be a good fundraiser.
10. Conclusion
 - a. This paper highlights several areas where our knowledge is deficient, and these and possible future research questions are summarised in s10.1.

Perhaps unsurprisingly, there is not much evidence, research or information specifically about fundraising and so any conclusions, ideas and recommendations will need to be adapted and inferred to a substantial extent from research conducted into other disciplines. For example, this paper draws heavily on the work of Dr Stan Lester, an expert in professional training, education and accreditation, who has reviewed and analysed the qualification pathways and competence frameworks used within professions in the UK (Lester 2009a, 2009b, 2014), and applying these to fundraising. And as marketing and PR are fundraising's closest cousins, there are lessons we can take from what has been researched in these areas.

One final consideration before moving into the body of this paper regards equality, diversity and inclusion (EDI). While EDI initiatives are quite rightly forefront of mind in the fundraising profession – led by the Chartered Institute of Fundraising through the Change Collective, which released four guides to embedding EDI in recruitment practices in the summer of 2020 (IoF 2020a, 2020b, 2020c, 2020d) – this report does not directly address EDI issues. The aim is to identify the most appropriate entry paths and ensure these are practised/operated in the most appropriate way to comply with and embed EDI policies.

01 Is fundraising a profession?

Deciding on what is the most appropriate qualifying pathway to fundraising is contingent on whether fundraising is a profession. For example, undoubted professions such as law and medicine have knowledge-based academic entry requirements, whereas entry pathways to trades are often provided by apprenticeships.

Almost all professions have some kind of structured qualifying pathway based on various combinations of classroom and practical learning that lead to a 'qualification' to practise – in other words, the entry process 'qualifies' candidate professionals as having a required level of knowledge and skills to perform competently as full members of the profession (Lester 2009). These pathways are described in detail in ss 5 and 6. It's important to note though, that being 'qualified' is not necessarily the same thing as holding a 'qualification', since there may be other routes to becoming 'qualified' such as by taking prior learning or experience into account (i.e. transferable skills) (ibid, p226).

Moreover, in most of these professions, the relevant institute or professional body establishes a qualification process to sign off an individual at the point of qualification to practise. Awarding qualified status is a "major function" of most professional bodies (ibid, p223). Neither the Chartered Institute of Fundraising in the UK, nor the Association of Fundraising Professionals in the USA, nor indeed any fundraising association anywhere, provides such a function.

Standard scholarship into the professions proposes a number of factors that demarcate professions from non-professions. One of these is that the profession is built on a body of theoretical and practical knowledge, which "requires prolonged study and specialist training" to acquire (Cheetham and Chivers 2005, p7; Breeze 2017, p164; MacQuillin 2017, p7). Another is that there are barriers to entry that are controlled by the community of professionals, who can police or regulate themselves through setting such controls as minimum criteria to enter the profession (MacQuillin 2017, p7).

While fundraising meets many of the criteria laid down by scholars for achieving professionhood – such as being non-commercial, having codes of standards and/or ethics – it fares less well on many other criteria, not just controlling entry via acquiring a specialised body of knowledge, but also in having 'professional autonomy' to make decisions (see MacQuillin 2017, p8). The consensus of many who have studied the professional status of fundraising is that it is at best an "emerging profession" (ibid p8, p15), which was also the title of HEFCE's 2014 report on higher education fundraising (More Partnerships and Richmond Associates 2014).

So there are no knowledge- or skills-based barriers to becoming a member of the emerging profession of fundraising. Anyone can become a fundraiser at any level (from most junior to most senior) without any requirement to formally or informally 'qualify'. A person can become a 'full' member of the fundraising 'profession' from the first day of

01

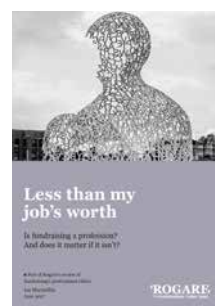
Anyone can become a fundraiser at any level (from most junior to most senior) without any requirement to formally or informally ‘qualify’. A person can become a ‘full’ member of the fundraising ‘profession’ from the first day of their employment, with no requirement whatsoever to ever fill the gaps in their knowledge or skills.

their employment, with no requirement whatsoever to ever fill the gaps in their knowledge or skills (and as described in the introduction, there are many such skills gaps), nor accredit the skills and knowledge they do have as a ‘passport’ to other roles. In fact, many current fundraisers seem quite proud of the fact that they have never attended a fundraising course or read a book about fundraising (Breeze 2017, p92).

This fact alone sets fundraising aside from virtually every other profession (with the possible exception of journalism and public relations – both of which might also be classed as emerging professions).

In the absence of any formal (or even informal) entry pathway that leads to qualified status, how do people enter the fundraising ‘profession’ and what criteria are used to assess those who apply? These questions are considered in s2 and s3.

NB: This short section has not intended to rehearse in detail the arguments about whether fundraising is or is not a profession. Fairly full considerations of this issue can be found in Rogare’s green paper on the topic, which is available to download from the Rogare website (MacQuillin 2017), or in Beth Breeze’s book *The New Fundraisers* (Breeze 2017, pp163-172). And while fundraising is best considered an ‘emerging’ profession, for editorial simplicity, fundraising is described as a ‘profession’ throughout the rest of this paper.



ROGARE'S PREVIOUS PAPER EXPLORES IN DEPTH THE QUESTION OF WHETHER FUNDRAISING IS OR IS NOT A TRUE PROFESSION.

02 Existing entry routes to fundraising

The guide for people looking for a job in fundraising published by the Chartered Institute of Fundraising in July 2020 begins: “You are interested in a job in fundraising, working for a charity with a cause you are passionate about. Where do you start?” (IoF 2020d, p2).

That’s a very good question, since there is a “lack of an obvious career path into fundraising” (Breeze 2017, p71). Even the IoF’s new guide for job seekers states that “there are no set career paths when it comes to fundraising” (IoF 2020d, p18).

But of course, people still enter fundraising, so they must be doing it through some less than obvious pathways. While there is no single body of research that describes all these routes in detail, we can infer many of them not just from the scholarly literature, but also anecdotal evidence from professional practice.

There are two broad – and very fundamental – divisions between those who become fundraisers:

- By accident/chance (they sort of fell into it)
- By design/choice.

In the UK, the evidence suggests that something like 44 per cent of fundraisers fell into fundraising by “accident” (Breeze 2017, p70), while Duronio and Tempel’s study of US fundraisers’ career paths in the 1990s found most had similarly got into fundraising “by accident” without quantifying this figure (Duronio and Tempel 1997, p84); and many American higher education fundraisers in the 80s and 90s attributed their careers to “chance” (Breeze 2017, p70). There is also plenty of anecdotal evidence, with a number of blogs or articles beginning with or including a variation of the line “I fell into fundraising by accident”.² Even the two case studies contained in the new IoF guide for job seekers are about people who fell into fundraising by accident or chance (IoF 2020d, p13, p15).

This is an ‘unusual’ entry route that is taken by almost 50 per cent of the fundraising profession’s workforce. As the Lily School of Philanthropy’s Sarah Nathan says: “You don’t hear a surgeon say she ‘accidentally’ went to medical school or an elementary school teacher indicate she ‘fell’ into the classroom.” It’s a phenomenon that is “relatively unique” to fundraising, and though Nathan says it is changing as more younger fundraisers enter



“You don’t hear a surgeon say she ‘accidentally’ went to medical school or an elementary school teacher indicate she ‘fell’ into the classroom.”

SARAH NATHAN,
LILY SCHOOL OF PHILANTHROPY,
INDIANA UNIVERSITY

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the profession having studied it through formal education, she says this change is occurring “ever so slowly” (Nathan 2018).

A similar story is anecdotally reported in fundraising in Ireland (Skehan 2017).

Yet for such an important entry route, the accidental pathway is poorly researched or understood: there is little knowledge about how this accident happens.

The alternative to falling into fundraising accidentally is to make a conscious decision to become a fundraiser. The ‘by design’ category can be split in to at least two further categories. Beth Breeze (2017, p70) identifies those who had “always wanted to work as a fundraiser”, which in her sample amounted to only five per cent. For this paper this is being termed the ‘intentional’ route.

If Breeze’s sample is representative of the population of fundraisers, this means that the fundraising profession consists of a professional workforce chosen as a first-choice career by just 1/20th of its members.

Breeze’s second category of fundraisers who made a deliberate choice to enter the profession are those who came into it “gradually through related professional and volunteering roles” – 42 per cent of fundraisers participating in her research – which in this paper is being termed the ‘gradual’ route.

There is also an “other” category accounting for nine per cent of fundraisers. So we have three possible entry routes based on the decisions made by the candidate professionals, two of which are non-accidental:

1. **Accidental:** no major decision to become a fundraiser; it just sort of happens (44 per cent, based on Breeze 2017)
2. **Gradual:** come to a decision to become a fundraiser over a period of time (42 per cent)

3. **Intentional:** make a deliberate decision to become a fundraiser as a first-choice career and work towards that (five per cent).

There could be some cross over between the three routes. It’s highly likely that some gradual processes towards becoming a fundraiser include a large dose of chance (or gradual fundraisers may actually view their gradual transition to fundraising as an accidental one). The path taken by many intentional fundraisers may well have been a gradual process through professional (such as face-to-face) or volunteering (such as internship) roles. It’s also possible many accidental and gradual fundraisers may come to a sudden life-changing decision to become a fundraiser – for example, someone who had been doing a street fundraising role might make a decision to make it their career, or a corporate executive devoid of professional fulfilment and meaning might have a Damascene moment and decide to switch sectors. But for the purpose of this conceptualisation, they are not ‘intentional’ fundraisers in that they did not intend from an early stage to forge a career in fundraising.

Further conceptualising these routes, describing their components (i.e. what constitutes the “related professional and volunteering roles”), and understanding decision-making of accidental, gradual and intentional fundraisers could be fruitful future research.

From the academic and practitioner literature, we can infer and describe several mainly non-accidental (i.e. gradual and intentional) entry pathways to fundraising:

- Transfer from another sector (gradual – i.e. probably most likely to be associated with a gradual route)
- Direct entry by responding to job application as first career choice (intentional)

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- Apprenticeships (intentional)
- Graduate trainee schemes (intentional)
- Internships (intentional/gradual)
- Voluntary role (gradual/intentional/accidental)
- University rag fundraising (accidental/intentional)
- Via face-to-face or other field force fundraising (accidental/intentional/gradual)

2.1 Transfer from another sector

We know anecdotally that many people come into fundraising having had long careers in other sectors, including the corporate sector and various parts of the public sector, including the military. This is classed as a gradual entry route because people coming in this way have acquired the knowledge and skills they need outside of fundraising but did not take steps to acquire those skills in order to become a fundraiser. But those transferring from other sectors must nonetheless have made intentional decisions to become fundraisers; it's assumed that corporate marketing directors don't wake up one morning to discover – in some Kafkaesque way – they've accidentally become a director of fundraising.

Beth Breeze's study reports that while fundraisers transferring from other sectors come from a variety of industry (and other) sectors, the most common discipline to have crossed over from has been marketing, sales and advertising, with 10 per cent of all fundraisers having these backgrounds (Breeze 2017, p71). The four others that fundraisers are most likely to come from are retail, event management, personal assistant/secretary, and office management. However, these five careers areas (marketing, sales and advertising being grouped under a single



TRANSFEREES TO THE FUNDRAISING PROFESSION COME FROM MANY OTHER SECTORS, INCLUDING COMMERCIAL AIRCREW, THOUGH IT'S HARD TO SEE HOW BEING A COMMERCIAL AIRLINE PILOT IS ANYTHING MORE THAN TANGENTIALLY PROFESSIONALLY RELATED TO FUNDRAISING.

heading) are outnumbered by all the other former careers of fundraisers, which include commercial aircrew, teachers, surveyors and engineers (ibid).

The figure of 10 per cent of all fundraisers having had previous sales/marketing/advertising careers would be about a quarter of the 42 per cent who came through the gradual route, if we assume that all previous careers related to those who took the gradual route. However, accidental fundraisers are also more likely than not to have had previous careers and it is not possible to say which former careers correspond to which entry pathway (accidental or gradual). And while Breeze talks about how fundraisers come in gradually through "related professional roles", it is hard to see how being a commercial airline pilot is anything more than tangentially professionally related to fundraising.

Further research on the backgrounds and former careers of gradual and accidental fundraisers who transfer from other sectors is needed, as is consideration of which of their transferable skills are most relevant to their success in transferring (though see s3). The motivations of those transferring seem quite apparent though – they want to do something more worthwhile than their current role (ibid).

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2.2 Direct entry

The smallest number – five per cent – of current members of the fundraising profession have made an intentional career choice to become a fundraiser. That this figure is so low has at least two possible causes:

1. Not many people make intentional career choices to become fundraisers
2. Those that do make such a decision lose out to candidates entering through accidental and gradual pathways.

The first seems highly probable. Lack of careers advice and lack of promotion of fundraising/working at a charity as a career choice, as well as poor public perception of what fundraising/working at a charity entail are described as potential barriers in s9. And as there is no established formal higher educational route to fundraising, this is not something that will be visible to school pupils when they are considering which subjects to study at university. It is therefore not at all surprising that not many people consider a career in fundraising at the start of their professional life.

But it also seems possible that many candidate professionals are at a disadvantage in the jobs market. They will not have been able to acquire any requisite professional knowledge or skills (because there are no programmes through which they can acquire these, unless they have acquired them through some of the other routes such as ‘chugging’, interning or student fundraising). Nor will they have the transferable skills that help gradual and accidental fundraisers find jobs.

One individual became a bit of a cause célèbre in her quest to find employment in the voluntary sector in 2017, chronicling her ups and downs (mainly downs) in a series of blogs. She described the Catch 22 of how she regularly lost out to someone with more

experience than she had, though she had no way of acquiring that experience unless someone ‘took a chance on her’ and gave her a job, even though she was volunteering and doing private study by reading up on fundraising (Fuller 2017).

Olivia Fuller was already taking steps to gain the experience that employers were looking for. She could conceivably have done even more, such as, interning, or becoming a field-force fundraiser, or putting herself through one of the IoF’s qualifications.

The question, however, is whether she ought to have to do this things, or whether there ought not be a better, more equitable, route to becoming an intentional, early career fundraiser that puts candidates on a level playing field with those who already have the skills and/or experience employers (seemingly) are looking for.

We know that fundraising consists of just five per cent intentional fundraisers. What we don’t know is how many potential intentional fundraisers the sector loses because they are at a disadvantage in the labour market vis-à-vis gradual and accidental fundraisers.

Olivia Fuller did eventually enter the fundraising profession, partly because many fundraisers went in to bat on her behalf (an option not available to most applicants). The odds however, were stacked against her. How much are they stacked against others in her position?

As is becoming recurrently apparent, we need more research on the direct entry route to fundraising, research that would attempt to answer the following, among other, research questions:

- How many jobs do direct entry candidates apply for before they are successful?

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- How likely are they to be successful – how many potential direct entry candidates never get a job in fundraising?
- What are the reasons for rejecting direct entry fundraisers (probably their lack of skills and/or experience)?
- What advice are they given on acquiring the skills and experience to get jobs?
- How many potential applicants for early career fundraising jobs choose not to even apply, and for what reasons?

This would be important research because it may be that fundraising is losing out on a wealth of potential talent because the ad hoc nature of entry pathways is disadvantaging the very people it needs to recruit to solve the talent crisis.

One way might be through apprenticeship or other trainee schemes.

2.2.1 Apprenticeships and graduate trainee schemes

There are more structured and formal forms of direct entry to fundraising rather than just hoping an employer takes a chance at a job interview.

Both apprenticeships and graduate entry schemes provide programmes for people to acquire the knowledge and skills they need to practise as a fundraiser, while earning a wage or salary. They are for different target markets: graduate entry schemes are for graduates (clearly) while apprenticeships are generally (but not exclusively) created for non-graduates.

Since April 2017, employers with salary/wage bills of more than £3m have been required to pay 0.5 per cent of this sum to the UK government as an Apprenticeship Levy, administered by HMRC. Employers can then access the funds they have deposited to pay for apprenticeships, which the government will then top-up by 10 per cent. Organisations with

salary bills below £3m can still set up apprenticeships. Apprenticeships typically last 12–18 months and may be used to train new employees or upskill first jobbers. However, apprenticeships may only be created from specific government approved standards,³ which are set up by employer groups known as ‘trailblazers’ (Stickson 2019).⁴

As of 2017, when the levy was introduced, there were no apprenticeship standards for charities (ibid). NCVO announced in 2017 that Fair Train – the nonprofit organisation that promotes work-based learning in the voluntary sector – was working on developing an apprenticeship standard for the charity sector (ibid), though the link is now dead and there is no information about it on Fair Train’s website.

But in 2019 the Chartered Institute of Fundraising announced that the fundraising sector would be developing an apprenticeship standard⁵ for fundraising, specifically as an entry route for non-graduates. A trailblazer group of charities has been established to develop the fundraiser apprenticeship standard,³ which will be used to allow charities to develop apprentice entry-level roles that will give non-graduates the “knowledge, skills and behaviours to be competent fundraisers at that level” (Xavier 2019a).

These fundraising apprenticeship standards are now completed, and as of July 2020 are awaiting final approval from the Secretary of State for Education;⁶ they are expected to be in use by September or October 2020.⁶

The trailblazer group of charities developing the fundraising apprentice standard has decided that the associated qualification (it is a requirement that apprenticeships are coupled with study for a qualification) will be set at level 3 on the qualification framework, which is equivalent to the level of study required at A-level (IoF 2020b, p20). The syllabus for this is currently being developed

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by the IoF, which will be the awarding body for the qualification.⁶ The IoF will not however deliver the teaching for the qualification. Teachers/trainers will be appointed by the charities running their own apprenticeships.

Initially the new fundraising apprenticeships will be used to upskill existing staff, rather than new entrants, and is intended to be taken by both graduates and non-graduates.

There is also an apprenticeship for arts fundraising that is being developed by Creative and Cultural Skills,⁷ and the development sector's umbrella body BOND is also launching an apprenticeship scheme using Apprenticeship Levy funds, including entry level fundraising roles, provided they are mainly digital marketing roles.⁸

Apprenticeships in fundraising under previous versions of government schemes have been available. For example, in 2013, Christian Aid, ActionAid and PlanUK jointly launched an apprenticeship scheme, which offered six young non-graduates (from a total of 242 applicants) the chance to gain work experience (and earning the then London Living Wage of £9.15 an hour) while studying for a business administration qualification. At least one of the hired apprentices was in fundraising (Rawstrone 2014).

A Google search reveals some historical jobs described as a 'fundraising apprentice', though how widespread such apprenticeships are is unknown as no research on them appears to have been done. So it is plausible to assume that a small proportion of the existing fundraising workforce has entered via some form of apprenticeship. And some recent or current apprenticeships appear to be offered under the government approved Business Administrator standard.⁹

Further research into the following areas would be useful:

- The scope and scale of fundraising apprenticeships
- Under what standards they are currently being offered?
- How useful the knowledge acquired is to apprenticeships?
- How successful are apprentices at going on to full-time regular employment?

Graduate trainee schemes have similar objectives to apprenticeships – to equip people with the skills and competences required for a fundraising (or charity) career – but are, as the name clearly states, meant only for graduates.

There is a graduate programme run by social enterprise Charity Works that is designed to find and develop the sector's "future leaders".¹⁰ Charity Works receives up to 5,000 applications for its graduate programme every year. About 10 per cent of these will get through the initial written application process to be invited to an assessment centre, of whom about 140 will be placed with 80 of Charity Works' partner organisations (these were the figures of the 2019 cohort), not just charities such as NSPCC, Age UK, RNLI and Marie Curie, but social enterprises, student unions and housing associations.

Successful applicants get a year-long paid placement (salary up to about £21,000) in one of six job areas: frontline work (such as service delivery and volunteer management), research and policy, internal comms and HR, external comms and campaigning, business development and fundraising, and IT and finance.

During their placement graduate trainees will undertake a leadership and development programme, which Charity Works says is not in itself a professional qualification, but is

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“endorsed” by the Institute of Management and Leadership. This programme contains several of the components that are outlined in section 4 of this paper, including mentoring, peer-to-peer coaching, facilitated learning and CPD, and a conference. Trainees also undertake two research assignments.¹¹

However, there is no guarantee of a job at the end of Charity Works’ trainee placement, and the programme is not designed specifically to find fundraisers, but the sector’s future leaders. Are there, then, any graduate entry programmes specifically for fundraisers?

CASE Europe runs such a programme for higher education fundraisers,¹² and Arts Fundraising & Philanthropy (funded by Arts Council England) runs a ‘fellowship’ programme for arts fundraisers,¹³ which has had 75 fundraisers pass through it since 2014.

The Arts Fundraising & Philanthropy Fellowship lists its core objectives as:

- To equip the Fellow with the knowledge and skills required to fundraise within the arts
- To test and prove those skills in practice
- To share learning for the benefit of other individuals and organisations.

The fellowship has variously recruited cohorts at entry-level and mid-career, providing them with a structured and formalised mentoring and training/educational programme, including study for the Arts Fundraising and Leadership Postgraduate Certificate, which, along with the whole programme, is accredited by Leeds University (see s4.6). As part of the programme, fellows are assigned a mentor (see s4.3). In 2020-21, a fellowship will run for senior professionals at ceo and development director level. (Arts Fundraising & Philanthropy, nd).

Some charities have run graduate trainee programmes specifically for fundraising, such

as the scheme initiated by NSPCC in 2005 (Professional Fundraising 2005), although NSPCC is now a partner organisation to Charity Works.

Research to collate and describe how many charities run their own graduate entry schemes and how many fundraisers are delivered by schemes such as that run by Charity Works would be helpful. And as has been mentioned above, the fundraising apprenticeship will be available to graduates, so it is a possibility that the fundraising apprenticeship becomes the fundraising profession’s graduate entry scheme, even though this might be by default rather than design/intention.

2.3 Internships and volunteering

One recommended route to gaining experience to enter fundraising specifically and the voluntary sector more generally is to volunteer or become an intern. These are listed together because, while the IoF says there are “many” paid internships (IoF 2020b, p19), others are unpaid and these are effectively time-limited full-time volunteering roles.

Many of the informal guides to starting a career in fundraising recommend volunteering/interning (see s2.6), as does the IoF’s guide for jobseekers (IoF 2020d, p19); and a report produced by East Anglia University for the Museums Association into entry to the museums sector workforce contained six recommendations, number one of which was (Davies 2007, p6):

“Museums should provide high-quality volunteering, work experience and internships for a wide range of people interested in a museum career.”

In January 2020, inputting the search term “fundraising intern” into Google brought up several results, some of which are paid (one was offering a rate of £8.21 per hour – the UK’s minimum wage for people over 25). Many others were voluntary roles, often, though not

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always, with allowances for lunch and travel, typically around £15 per day.

As with the other entry routes already considered, further research is needed to assess, among other things:

- How often do internships lead to professional roles in fundraising and what is the wastage (i.e. how many interns never achieve a fundraising career)?
- The quality of internships – are they structured towards the needs of the intern (their future employment) by providing opportunities to acquire knowledge and skills that are later usable – or are they merely a way of gaining cheap labour?
- Do interns actually acquire knowledge and skills that are later usable?
- How many charities offer paid internships and how many voluntary internships?
- What funding is available to support internships?

There are also ethical and EDI issues. Because internships require people to work full time, often for no money or limited expenses, they are only feasible for those who have sufficient funds to be able to work full time unpaid. According to the Sutton Trust, 70 per cent of Britons think unpaid internships are unfair, because of “the inherent unfairness of working without pay, and the advantage accruing to those from wealthy backgrounds” (Sutton Trust 2014, p3). Discussion on the Critical Fundraising Forum and Fundraising Chat on Facebook reveal many voices in fundraising opposed to unpaid internships for the same reason.

They have also been labelled as “morally unjust and exploitative” by the organiser of a campaign – herself a charity intern – for a fair wage for all charity workers (Weghman 2015, p599). For example, one charity did away with entry level jobs and replaced them with

internships with exactly the same job descriptions (ibid). And if ‘volunteering’ is required to gain skills needed for full employment, then that arguably is akin to an unpaid internship, and the terms ‘volunteer’ and ‘intern’ are sometimes used interchangeably at charities (ibid, p600).

2.4 University rag fundraising

Anecdotally, university student ‘rag’ (which stands for ‘raising and giving’) fundraising has provided some of the UK’s leading fundraisers, and student fundraising is so well established as to have its own representative organisation the National Student Fundraising Association,¹⁴ which hosts a large annual conference and annual awards.

While it is reasonable to expect that many student rag fundraisers go on to find careers in professional fundraising, there is no research or information available on rag as an entry pathway to fundraising. As before, further research is needed to answer the following research questions:

- What are the motives for students to get involved in rag, and particularly whether they do so with a view to a career in fundraising (see also s8.2 on ‘purists’ and ‘players’)?
- How successful are rag fundraisers in the labour market and what proportion of the current workforce has entered via this route?
- Do employers take rag experience into consideration?
- Have the skills and experience gained during rag fundraising proved transferable and usable in their professional careers?

2.5 Via face-to-face (and other field force) fundraising

The stereotype of a ‘chugger’ is a student doing a part-time job during their vacation or an actor resting between roles: people doing a job

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they don't care about to pay the bills, on a par with working in a bar or a shop. But it was never seen as an entry route to fundraising. No-one thinking about how to get a career in fundraising would have been advised 'learn the ropes by becoming a chugger'.

However, face-to-face fundraising (F2F) in its modern incarnation has been practised for a quarter of a century, and during that time, many people who were street fundraisers have progressed into working at charity fundraising departments, and some having risen to quite senior roles, even directors of fundraising.

This was revealed by research carried out to map the career paths of former street fundraisers by F2F employment/recruitment agency Flow Caritas, which provided many hitherto unknown insights. Flow Caritas's study consisted of detailed quantitative research among 96 participants. While this might seem a small sample, Flow Caritas estimated at the time that the total population of former street fundraisers in full-time roles was probably only about 200.

Almost a quarter of former street fundraisers had gone into the role because they wanted to work for charities and thought this was a good entry point, while 10 per cent did so because they wanted to be fundraisers. The stereotype of students (18 per cent) and out-of-work creatives (13 per cent) was confirmed, while 30 per cent took it up because they just needed a job, any job (Flow Caritas 2014, p9). But, they all went on to become fundraisers, many saying they came to realise that this is what they really wanted to do, a decision some came to over a long time (ibid, p10); while a third became street fundraisers as an intentional first step towards a charity sector career.

Moreover, those former street fundraisers all considered that the skills and experience they acquired doing this job – particularly confidence at asking, and making an elevator

Unpaid internships have also been labelled as “morally unjust and exploitative” by the organiser of a campaign – herself a charity intern – for a fair wage for all charity workers. For example, one charity did away with entry level jobs and replaced them with internships with exactly the same job descriptions.

pitch (ibid, p16) – helped them progress in their subsequent careers (ibid, p18).

So street fundraising is probably an intentional, gradual and an accidental route into fundraising.

The report concludes (ibid, p19):

“Street fundraising has brought in a highly successful generation of fundraisers who would probably never have been fundraisers had they not got what they thought was going to be a temporary job as a ‘chugger’.

“This project has confirmed that, for those who want to treat it as such, street fundraising is an excellent ‘apprenticeship’¹⁵ for a subsequent fundraising career.”

In the six years since the Flow Caritas report was published, it is almost certain that many more people have entered the fundraising profession through street fundraising. It can also be reasonably inferred that if street fundraising is proving to be a bona fide entry route into the fundraising profession, as is recognised by the IoF (2020b, p20; 2020d, p6), then people are also coming in through other forms of field force fundraising such as

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“Street fundraising has brought in a highly successful generation of fundraisers who would probably never have been fundraisers had they not got what they thought was going to be a temporary job as a ‘chugger’.”

RORY WHITE, DIRECTOR, FLOW CARITAS

doorstep F2F and telephone fundraising. For example, student fundraisers who have learned the craft on university ‘phonathons’ are recommended as a potential source of new entrants to HE fundraising (More Partnerships and Richmond Associates 2014, p12).

Further research would be helpful to ascertain the proportion of the current workforce entering via these routes.

2.6 Which of these routes to choose?

This chapter started with the quote from Beth Breeze’s book (2017, p71) that there is no obvious path into fundraising. And a blog on the CharityJob website – which is a partner to the IoF and wrote the IoF blog about getting a career in fundraising – says that there is no “set” career path into fundraising (Bheenuck 2017), a blog that is republished in the IoF’s new guide for jobseekers (IoF 2020d, p18).

So assuming that someone who wants to become a fundraiser isn’t going to sit around and wait for it to happen by accident, which of these routes should they take, and what advice is available to them about which routes to take? The answer is not much.

The Chartered Institute of Marketing’s (CIM) website has a comprehensive section on how to get into marketing.¹⁶ This details three possible entry routes based on graduate entry, CIM professional qualification, or apprenticeship (based on approved apprenticeship standards for both marketing

executive and marketing manager). There is also a scheme whereby undergraduates can combine their marketing degrees with a CIM qualification, and full details of those qualifications, including a course designed for those looking to enter marketing. The website also suggests the skills that might be useful in a marketing career, such as art and design, and computer skills, with short paragraphs about how each domain of skills might be used in marketing.

By contrast, until July 2020 there was nothing like this on the IoF’s website. While a page called Jobs and Careers can be accessed two levels down from the IoF’s homepage (via the Professional Development page), there is nothing on the IoF website about how to start a career in or get into fundraising; the careers advice is for those who are already fundraisers.¹⁷ The IoF website does of course contain details of its qualifications, but none of these is an entry level or pre-entry level qualification.

However, there is a blog on the website by IoF partner CharityJob entitled ‘Finding your first fundraising role’, though this is not linked to from the Jobs and Careers page. The recommendations of this blog are detailed below. There is also a page on the Scottish section of the IoF website called ‘Considering a career in fundraising’,¹⁸ but this merely lists the skills needed to be a fundraiser, including being highly organised, a skilled researcher, and “brilliant with budgets”.

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THOUGH OFTEN CARICATURED AS A STOPGAP FOR STUDENTS AND RESTING ACTORS, STREET FUNDRAISING HAS BEEN A PROVING GROUND FOR MANY OF TODAY'S FUNDRAISERS.

This appears to be all there is on the IoF website about how to get a job in fundraising. The websites of the Association of Fundraising Professionals and Fundraising Institute Australia are similarly devoid of advice on entering the fundraising profession.

While there is little 'official' advice on starting a career in fundraising provided by the professional institutes, there are many advice blogs written by recruitment/employment agencies and others involved in professional practice. A sample of these are summarised below. These blogs were found using the Google search term "how do I get into fundraising" and choosing those that were a) written by specialist charity recruitment agencies, and/or b) provided the most concrete advice.

Many of these blogs/sources also include information about different fundraising roles and the skills needed/recommended for a career in fundraising, so they are not always worded as explicitly as 'if you want to get a career in fundraising, then do A or B if you are a graduate or C if you are not' (as the CIM website does). The advice for getting into fundraising is more about how, in the absence of an obvious or set entry path, a person should go about getting the experience employers require (see Table 2.1).

Volunteering as a fundraiser is the route most recommended. Getting a degree and then applying for graduate entry is recommended

because this is what employers require. But these advice columns are not saying that a degree is necessary to be a competent fundraiser, only that it will help get a job if you have a degree (see s8.3 for a discussion about graduate entry into fundraising).

Transferable skills, particularly those obtained in sales and marketing roles, are considered important.

But more structured ways of gaining experience, such as through a professional qualification or attending fundraising courses, are perhaps not quite as consistently recommended as might be imagined. Perhaps there are three reasons for this:

1. The authors are not aware of what's available?
2. They don't think they will provide relevant skills or knowledge?
3. They don't think it's worth recommending them as they will not provide an advantage in the job market (the same way that volunteering or having a degree does)?

It's an open question which of these three it is most likely to be, and further research would be helpful to ascertain which of these it is.

Only one of these blogs mentions entering via face-to-face street fundraising and only one mentions student rag fundraising.

And some of these are more like sideways routes into fundraising. For example, CharityJob suggests building a network and getting to know people, which is one of the tricks Olivia Fuller did to help get her name known to potential employers.

In July 2020, the IoF published a document containing advice for people looking for a job in fundraising (IoF 2020d). This report provides much practical advice, such as how to prepare for interview, how to write a CV and covering

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letter, flexible working and how to inform employers about a disability. Of course, it also contains advice about how to secure a job – in fact it republishes an edited version of the CharityJob blog (Bheenuck 2017) included in Table 2.1. Types of advice presented in the document include:

Internships:

- Make sure an internship is the right point of entry for you into the profession
- Immerse yourself into the internship to gain as much knowledge as possible
- Find internships which provide you with skills beyond basic administration.

Apprenticeships:

- Make sure you find the right balance between work and your ‘off the job’ training
- Immerse yourself in all the ‘on the job’ tasks assigned
- Discuss what you want to get out of your apprenticeship with your employer.

Transitioning from face-to-face:

- Make sure you gain knowledge about the broad scope of fundraising beyond F2F
- Be upfront about your development needs but express enthusiasm for learning
- Be aware of the differences between commercial companies and charities.

	All About Careers	Andy King Raising	Career Trend (USA)	CharityJob	Guardian	National Careers Service	ProspectUs	Talent Market (USA)	TPP
Intern				↑			↑		
Volunteer		↑	↑	↑	↑	↑	↑		↑
Entry level/ junior job				↑		↑			
Start at small charity		↑			↑				
F2F				↑					
Apprenticeship						↑			
Rag/student fundraising		↑							
Get professional FR qualification			↑	↑		↑			
Take FR course		↑					↑	↑	
Build FR knowledge				↑	↑				
Get degree/ graduate entry	↑	↑				↑	↑		
Have transferable skills (general)		↑	↑	↑					↑
Transferable skills (sales and marketing)		↑		↑			↑		↑
Marketing qualification							↑		
Build a network				↑					

TABLE 2.1 ADVICE ON HOW TO GET INTO FUNDRAISING – LINKS TO THESE SOURCES ARE IN THE APPENDIX.

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Transitioning from temporary to permanent role:

- Volunteer for additional tasks during your temporary employment
- Make it known that you are seeking permanent employment after your contract.

But what the IoF's guide does not do is recommend jobseekers follow a structured career pathway into fundraising, as the CIM website does for marketing, because, as it says in the document itself (p18), no such pathway exists.

2.7 Summary

There are various routes that people have taken and can take into fundraising, but none of these is an "obvious" or "set" (which could be interpreted as "recommended") route into the profession. Most people have got into it by accident or after having forged careers in other sectors and can use their transferable skills and experience to get jobs in fundraising.

But this might be at the expense of people – such as Olivia Fuller – who make intentional decisions to become fundraisers, but have no set or obvious path into their chosen profession, because they don't have the skills and experience employers are looking for and there is no way for them to acquire those in a short space of time, without doing things such as volunteering or interning, which are possibly "morally unjust and exploitative".

Because employers cannot choose new entrants to fundraising based on a recommended entry route that provides them with necessary skills and knowledge, they have to fall back on other factors. One of these is transferable skills. Another is the qualities, attitudes and motivations of the candidate professionals themselves. This is the subject of the next section.

03 Desirable/recommended traits and characteristics of entrants to fundraising

It doesn't take much to succeed in fundraising. Sure, a "certain amount", of "commercial acumen and the ability to build relationships with people" are needed to "thrive" in the profession. But, "all you really need is enthusiasm, drive, ambition, tenacity and confidence". (All About Careers, no date.)

When many commentators and industry figures talk about the traits needed to be a good fundraiser – and by inference the traits that new entrants to the fundraising profession ought to have – they more often than not describe attitudes, motives or virtues inherent to the fundraiser rather than the skills or experience that might be acquired during a qualification process.

In her book *The New Fundraisers*, Beth Breeze analysed what she described as the 'how-to literature' – fundraising guides written by practitioners based on their own personal experiences (Breeze 2017, p97). These books – Breeze reviewed 60 such books – contain advice both on 'doing' fundraising and on 'being a fundraiser'. 'How to' guides of course talk about the skills needed to do fundraising. However, the vast majority of 'how to' guides

present skillsets in areas such as planning, marketing, strategy and management as necessary but not sufficient to successful fundraising, because those fundamental skills provide only the infrastructure that enable successful fundraising to take place (ibid, p99).

The missing ingredients are provided by the qualities necessary to be a fundraiser, not just the knowledge/skills a fundraiser needs to have. Breeze summarises the various requirements under four headings (ibid, p100):

- Be passionate
- Be authentic
- Have good interpersonal skills
- Be able to take pressure.

Of these, "passion" is a "recurrent theme" in 'how to' guides, so much that they "risk being classified as romance if computers ever displace librarians" (ibid). Central to this is that fundraisers are regularly told that they must be passionate about the cause, genuinely passionate, otherwise donors will be able to spot inauthenticity or fakery (ibid).



"Passion" is a such a recurrent theme in 'how to' guides to fundraising, that Beth Breeze says they "risk being classified as romance if computers ever displace librarians".

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The blogs and sources analysed in s2.6 on how to start a career in fundraising also contain lists and descriptions of the recommended traits needed to start and make a success of a fundraising career

These include:¹⁹

- Ambition
- Commitment
- Drive
- Enterprising
- Enthusiasm
- Proactive attitude
- Resilience
- Sensitivity
- Tenacity.

Similarly, the Commission on the Donor Experience's project on "getting the right people as fundraisers" lists the skills required for different types of fundraising, mixing technical/professional skills (e.g. networking skills, marketing skills, numerate, writing skills) with personal attributes and qualities (e.g. genuine, authentic, passionate, shows empathy). (Sharpstone and Skinner 2017, pp10-12).

Breeze also summarises five academic and grey literature research reports into the desirable traits of fundraisers, which also mix technical/professional skills with personal attributes and qualities (including "personal charisma"), with two of the studies listing passion for the cause (Breeze 2017, p61). However these formal studies rarely include knowledge of the field. One study recommends fundraisers should have marketing skills (sales, customer service), management skills (people management, time management, budgeting, planning), and professionalism, though this study also highlighted integrity and passion for the causes as "key" (Scaife et al 2011, p27).

But only one study cited by Breeze – Duronio and Temple (1997) – listed "knowledge of the field" as their top-rated desired characteristic (Breeze 2017, pp62-63). This foreshadows the discussion about whether fundraising is an art or a science, and how the outcome of this discussion might affect the types of entry routes/pathways into fundraising that we develop (see s8.1).

The general public also appear to think that personal attributes are more relevant to a fundraising career than using and applying technical knowledge. Research conducted by the Institute of Fundraising in 2019 showed that the public rates dispositions such as creativity, effective communicator, influencing and inspiring people, and having a positive attitudes (29-37 per cent of people thinking these were skills associated with the fundraising profession) much, much higher than skills such as numeracy, literacy, adherence to rules (which implies having a knowledge of the rules), or being able to analyse data (all in single figures) (Institute of Fundraising 2019, p11).

Yet Breeze describes much of the focus on skills such as passion as "verbiage".²⁰ She says the 'how to' guides often provide "scant detail...as to what exactly it is that fundraisers need to do, and how to do it, in order to be the kind of person who can successfully raise a lot of money... 'Be interesting', 'be inspiring', 'be passionate' and so on – what this means in practice is less clear."

Addressing the issue of passion and authenticity, the final report on the Commission on the Donor Experience (2017, p11) says:

"While fundraisers should exemplify both passionate commitment to their cause and appropriate professional standards, passion is usually more valued by donors than technique or slick professionalism. Though they greatly value

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competence and commitment, many donors are suspicious of business practices and overt commercialism from the charities they support. Many would prefer to see a different, more distinctive, more obviously values-led approach. Donors generally will prize passionate belief in the cause ahead of technical abilities, particularly in sales and marketing, which donors often see as inappropriate.”

It strongly suggests – in fact it very nearly explicitly states – that “passionate commitment to the cause” should be prioritised over professional competence.

This approach raises a number of issues.

First, how do we conceptualise, measure and assess “passionate commitment to the cause”? And, assuming we can do those things, is passion really so essential to fundraising success? Has it ever been tested and researched? Maybe dispassionate fundraisers are equally good or even better.

Second, how are potential fundraisers assessed on their suitability to enter the fundraising profession – what weight is given to their technical/professional skills vis-à-vis their personal attributes and qualities?

In the absence of a qualifying process designed to equip fundraisers with the technical/professional skills they need to competently practise (which is what most other professions have – see s5 and s6), how are employers to assess whether new entrants have those skills?

If they cannot do that, or indeed assume that new entrants do not have them (because there is no reliable way of getting them) then the personal qualities/attributes become the deciding factor, and factors such as passion, authenticity, and interpersonal skills become the major factors on which candidates are assessed.

This prioritisation of personal qualities/attributes may also be driven by normative ideas about what fundraising ought to be – that it is, or ought to be, an ‘art’ (which requires personal qualities) rather than a ‘science’ (which requires technical knowledge). This is further discussed in s8.1 and s9.4.

This division of opinion in turn is important. If and when the fundraising profession comes to construct its own qualification pathway, the art vs science debate may influence the type of competence framework the sector chooses, with ‘artists’ possibly favouring behavioural models of competence (see s6.1.2)

04 Existing ways to 'qualify' as a fundraiser

The fundraising profession in the UK has no formal way of signing off fundraisers as competent to practice. This puts fundraising at odds with most professions since professional bodies/institutes generally conduct mandatory assessments of professionals' ability to practise at point of qualification (Lester 2009, p233). This is why 'qualification' in the section title is in scare quotes, since no-one actually 'qualifies' in the fundraising profession as they do in other professions, where the objective of the qualifying process – usually administered by the relevant professional institute – is to “ensure the quality of practitioners at the point of entry to practice...or sign off to practise independently” (ibid).

Nonetheless, there are ways for fundraisers to acquire knowledge and skills, even though, at present, none of these is a formal qualification to practise, even though some of them are professional qualifications – as Beth Breeze (2017, p72) says: “Informality remains the dominant motif of career entry and progression.”

The routes are:

- On-the-job learning
- Self-taught
- Mentoring
- Professional training
- Continuous professional development
- Professional qualification
- National Occupational Standards
- Certification/credentialing
- Higher (university) education
- Apprenticeship.

4.1. On-the-job learning

Fifty-three per cent of the fundraisers who took part in Beth Breeze's study reported that they had learned “on the job” (had reported this as their main method of learning), by experience, observation and experimentation (Breeze 2017, pp71 – 72) – in other words, they had learned the job by doing the job (or in sporting parlance, had become match fit by playing matches). A further 28 per cent said they had learned by “working alongside an experienced fundraiser”, who we can assume is probably in the same department as they are (since mentoring and discussions with other fundraisers, who may not be in the same department, are listed as separate categories).

Combined, these two categories account for 81 per cent of British fundraisers attributing their main location for acquiring the knowledge and skills they need to practise competently as their place of work, and the 'teachers' being their experienced colleagues (which begs the question that their colleagues actually do have sufficient and appropriate knowledge to pass on).

The phrase used by a number of respondents to Beth Breeze's study was that fundraising was “caught and not taught” (ibid, p71). Does this phrase simply describe how they acquired their skills and knowledge, or does it also contain hidden assumptions that fundraising cannot be taught? This question will be considered in s9.4.

Sarah Nathan and Eugene Tempel of the Lily School of Philanthropy at Indiana University have found that 92 per cent of American fundraisers acquire knowledge through on-the-job training²¹ (MacQuillin 2017, p10).

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4.2 Self-taught

According to Sarah Nathan's work, 55 per cent (see footnote 21) of American fundraisers are "self-taught" (MacQuillin 2017, p10), which could include a variety of learning methods. Breeze (2017, p72) lists "reading books about fundraising", "finding information online", and "informal discussion with other fundraisers", as separate categories of main learning methods (though only cited as such by a handful of respondents, making up only four per cent), which are likely to fall under a 'self-taught' heading. The advice provided about starting a career in fundraising included recommendations to get up on fundraising knowledge through self-teaching (see Table 2.1).

4.3 Mentoring

Having a mentor is another way of acquiring knowledge (which could conceivably be subsumed within either the on-the-job or self-taught categories). Two per cent of British fundraisers mainly acquired their knowledge from a mentor (Breeze 2017, p72), while 58 per cent of their American counterparts have learned from a mentor at some stage. The HEFCE report on entry to higher education fundraising also recommends mentoring as a way to "accelerate progress and deepen understanding", especially at senior levels (Moore Partnerships and Richmond Associates 2014, p12, p43).

4.4 Professional training

There are many – almost a plethora of – professional training options (including conferences) available to fundraisers, run by professional institutes and commercial providers. It's not relevant to this paper to review these; we all know they are out there. In the USA, Sarah Nathan reports that 71 per cent of fundraisers have acquired knowledge through what she describes as "professional education (conferences etc)" (MacQuillin 2017, p10). However, in the UK, only 11 per cent of fundraisers cite "attending courses" as their main learning method. Attending a fundraising

course is recommended to people who want to get into fundraising (Table 2.1).

Attending conferences and events can be an ad hoc, unstructured way of acquiring knowledge. It may be for example that a legacy fundraiser attends a conference on legacy fundraising to find out the latest ideas and practice; or a new fundraiser may be sent on a basic course or a national conference to provide them with their basic understanding of their new profession. In both cases, the decision to attend the professional training event is a reactive one in response to an identified skills gap: the new fundraiser has few skills and needs to acquire them; the legacy fundraiser notices that new ideas are being presented and decides she needs to find out about them (though this is only one possible reason why the legacy fundraiser may decide to attend this event).

But in a more structured learning environment they could be components of a continuous professional development programme.

4.5 Continuous professional development

Continuous (or continuing) professional development (CPD) is, according to the UK's CPD Certification Service, the term used to describe the:

*"Learning activities professionals engage in to develop and enhance their abilities. It enables learning to become conscious and proactive, rather than passive and reactive...combining different methodologies to learning, such as training workshops, conferences and events, e-learning programs, best practice techniques and ideas sharing"*²²

So CPD encompasses a variety of learning methods and routes and structures these to ensure professionals' skills sets are continually kept up to date, allowing individuals to upskill or re-skill.

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The Institute of Fundraising runs a CPD programme,²³ which consists of a page suggesting types of learning provided mainly by the IoF (such as courses and qualifications) and a template document for members to log which of these learning routes they have taken, why they took them, what they have learned, and how this has impacted on their practice.

The IoF's CPD adopts a "reflective learning model",²⁴ which puts the responsibility on the practitioner to identify their own knowledge/skills gaps and take steps to fill them, which can include reading news articles and listening to podcasts, and attend any meetings or training course they see fit.

The IoF's model is thus a form of 'self-directed' CPD, in contrast to 'structured' CPD (CPD Certification Service 2016a).

Structured CPD is a formal learning environment that includes training courses, online learning, workshops and seminars, takes a methodical approach that can be repeated, and involves two-way interaction between trainer and delegate (ibid).

Self-directed CPD is more informal, does not follow a methodical training programme, and does not contain interactions with trainers. Rather practitioners reflect on their knowledge/skills needs and take steps to address these through blogs, books, "general industry study and research" and informal discussion (ibid) - it can be more akin to skills and knowledge being "caught and not taught" (Breeze 2017, p71).

The IoF's CPD programme does allow for attendance at conferences and training events. However, it does not allocate points or credits for hours spent on CPD activities, or events attended, or otherwise review or monitor practitioners' CPD progress, which is a role often performed by professional bodies (CPD Certification Service 2016b) - it is entirely the

responsibility of the individual fundraiser. Many CPD programmes do allocate points or credits (as does the CFRE - see s4.8) which count towards the formal recognition that the practitioner has maintained their CPD portfolio to required levels (ibid).

It is unknown how many fundraisers are currently participating in the IoF's CPD programme and IoF does not keep records. Nonetheless, the IoF is considering an individual's CPDP record as one of the routes to acquiring individual chartered status (Xavier 2019b).

4.6 Professional qualification

Professional qualifications are run and awarded in the UK by the Institute of Fundraising through the IoF Academy. While other organisations may offer training courses or more informal educational courses, the IoF offers a recognised professional qualification, with a syllabus set by an academic chief examiner (formerly Jen Shang of Plymouth University; currently vacant) and overseen by an academic external examiner (Rita Kottasz of Kingston University). The IoF qualifications have been developed for fundraising across the board. The institute for schools fundraisers - the Institute of Development Professionals in Education - does not have its own qualification, but directs its members to the IoF qualifications. The body representing arts fundraisers does offer a professional qualification - the Arts Fundraising & Leadership Post Graduate Certificate²⁵ - which is available as part of the fellowship run by Arts Fundraising & Philanthropy and Cause4 (see s2.2.1), or to independent learners who are not part of the fellowship, but only at times when the fellowship is being run, and is accredited by Leeds University.

The IoF runs three courses at three different levels:

- Certificate in Fundraising - Level 4 on the

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UK's qualification frameworks (equivalent to the level of study required for a Higher National Certificate or Certificate of Higher Education)

- Diploma in Fundraising – Level 5 (equivalent to the level of study on a Higher National Diploma or Foundation Degree)
- Advanced Diploma in Fundraising – Level 7, equivalent to one third of a master's degree.

The IoF is also currently developing a qualification at level 3 as part of the new fundraising apprenticeship (see s2.2.1)

And it is also developing a Level 6 (Bachelor's degree level) course that will include modules such as professional development, contemporary issues in fundraising and an independent research/study project.

The IoF used to run a further qualification, the Introductory Certificate in Fundraising. This has been withdrawn and replaced by a training course named 'Introduction to Fundraising', which does not count as a qualification.

Twenty-eight per cent (329 fundraisers) of Beth Breeze's participants to her study had one of these four IoF qualifications (Breeze 2017, p73); although the IoF reported in 2017 that the total numbers of fundraisers holding one of these four qualifications was 2,578 (MacQuillin 2017, p11). With the IoF's membership at the time around the 6,000 mark, that would have been roughly 40 per cent of its membership holding some form of professional qualification (assuming that all holders of the qualification were also IoF members).

Full details of these qualifications can be found on the IoF's website.²⁶ None of these is an entry level qualification – though the new Level 3 qualification could be – and even the Certificate has a recommended minimum previous experience of one year paid or voluntary work. They are not cheap, costing between £2,000 and £2,500.

The IoF's Certificate has formed the basis for a raft of professional qualifications for 10 other European fundraising associations (including France, Germany, Sweden and Finland) under the aegis of the European Fundraising Association's Certification Programme.²⁷ Each association's qualification is intended to be recognised across all EFA member associations, being based on a common syllabus and a common set of competencies.²⁸

There are no academic professional qualifications for fundraisers run by the Association of Fundraising Professionals in the USA, where plans to create an academic curriculum for fundraising were abandoned in favour of certification in 1976 (Aldrich 2017, p107).

As has been mentioned previously and will be mentioned again, holding a professional qualification is not the same thing as being professionally qualified, since for most professions, being qualified requires things other than the qualification, such as supervised practice (Lester 2009, p226).

4.7 National Occupational Standards

It may not be widely known, but fundraising has a set of formal occupational standards, which are "statements of the standards of performance individuals must achieve when carrying out functions in the workplace, together with specifications of the underpinning knowledge and understanding";²⁹ and documents that "describe the knowledge, skills and understanding an individual needs to be competent at a job".³⁰

The NOS can then be used by professional bodies to create qualifications and build the standards for apprenticeships, and by employers to identify the skills they need in their employees and thus provide training to existing employees to develop their skills and recruit new staff with those skills.

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Fundraising's National Occupation Standard were first published in 2003, work having begun in 1998 with the involvement of NCVO, the Institute of Charity Fundraising Managers (as the IoF was then called) and various charities. Work on updating them was begun in 2007 by the UK Workforce Hub – an initiative of NCVO – led by Professor Adrian Sargeant with a team of fundraisers convened by the IoF. When the new standards were published in 2008, they had been cross-referenced with the IoF's code of practice (Lake, 1998; Barrett 2007; Jordan 2008; Lake 2008).

According to Beth Breeze (2017, p95), the standards were again adapted in 2013 by a then recently established body called Skills Third Sector. A link to the 2013 standards on the IoF website is provided by Breeze (ibid, p221) although this is now a dead link. Following a link from a Google search leads to page for the standards but the download link is not live.³¹ And none of *Third Sector*, *Civil Society Fundraising* or *UK Fundraising* provided any coverage of the publication of the 2013 standards.

The standards (listed in references under UK Workforce Hub 2008) – are available online via the website of grant-matching website Funding Central, and of course via the UK Standards website – but not on the IoF's website. However the IoF's 'Introduction to Fundraising' training course "covers the same areas of the National Occupational Standards in Fundraising, but with more emphasis on practical application".³² The only other mention of the standards on the IoF website is in the handbook for the Certificate in Fundraising qualification, in which the standards are included in the syllabus for the first unit on the fundraising environment.

It is unclear exactly how and if at all the NOS for Fundraising are used for their intended purposes, and further research to ascertain this would be beneficial.

A different set of National Occupational Standards for arts fundraising were developed in 2013 by Skills Third Sector for the Arts Fundraising & Philanthropy Consortium. Some of these standards align with or correspond to the general fundraising standards, while others are specific to arts fundraising. These are currently being updated with the aim that they achieve wider adoption across the arts sector, and specifically so that Arts Fundraising & Philanthropy can build entry routes, competency frameworks and qualifying pathways for arts fundraisers.³³

4.8 Certification/credentialing

Certification is a form of assessing a professional's required knowledge, usually by an exam, that aims to indicate competency in a defined set of standards, which are established through a systematic analysis of tasks performed by practitioners. Certification – which should not be confused with being awarded a certificate for having passed a course or training programme – requires a minimum period of practice before a practitioner can become certificated (Chobot 2004, p37).

The main certification programme for fundraising is the US-based Certified Fund Raising Executive (CFRE), which is accredited by the American National Standards Institute.³⁴ There are 6,700 holders of the CFRE in more than 20 countries, but mainly in the USA and Canada; and while the CFRE exam has been available in the UK since 2004, where its introduction was championed by the Association of Fundraising Consultants (Lake 2004, 2007), currently just 27 UK-based fundraisers are certified through it.³⁵

Other certification schemes in the USA are Fellow of the Association of Healthcare Philanthropy (FAHP) and Advanced Certified Fundraising Executive (ACFRE), for fundraising leaders (Chobot 2004, p32), which despite its similar name is not connected with the CFRE.

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Fundraisers must have a minimum five years' experience (and meet certain criteria during those five years³⁶) to sit the 225-question multiple choice CFRE exam, which is based on an analysis of the tasks a fundraiser of that experience would commonly perform, and the skills and knowledge they would need to perform those tasks. The CFRE must be renewed every three years.

Although the EFA's qualification programme is termed a 'certification' programme, it is really a qualification programme (s4.6).

4.9 Higher (university) education

There is next to nothing in the form of bachelor's degree education in fundraising that an 18-year-old can study at university to prepare them for entry to the fundraising profession, the way they can choose from a multitude of marketing degrees if they want to take the graduate entry route into marketing, and choose to combine this with a professional qualification at the same time (see s2.6). In fact, in the UK, there is just a single degree course, a BA in charity development at Chichester University,³⁷ which was first run in September 2014.

There are many postgraduate courses, with Master's degrees in various fundraising and other nonprofit topics currently offered by, among others, the Centre for Charity Effectiveness at Cass Business School³⁸ and Kent University's Centre for Philanthropy³⁹ with other universities having done so in the past. However, as postgraduate courses, none of these provides entry-level education for those wanting to become fundraisers, and may require prior experience in the profession as an entry requirement for the course.

The Open University used to run a course - 'Winning Resources and Support'⁴⁰ - developed in conjunction with the Institute of Fundraising, successful completion of which would lead to certified status of the IoF (which

can now only be achieved by completing the Certificate in Fundraising). However, this course ended with the withdrawal of government funding for so-called 'lower level qualifications' in 2008.⁴¹

Until 2012, any student completing a relevant Master's degree at City Business School (formerly Cass Business School), London South Bank University, Sheffield Hallam University and University of West of England could also apply for certified membership of the IoF.³⁹ However, students who take the social and not-for-profit marketing module on the marketing BSc at Hull University can apply for the IoF Certificate in Fundraising.

HEFCE's report into university fundraising suggests universities have a vested interest in developing graduate and postgraduate courses for fundraising since doing so would be helping to build their own fundraising workforce (More Partnerships and Richmond Associates 2014, p15).

4.10 Apprenticeship and graduate trainee schemes

As discussed in s2.2.1, formal apprenticeships in fundraising have previously been available, which will have provided a structured route to knowledge and skills acquisition though, as was said in s2, it is unclear how many apprenticeships have been available, what standards they followed, and how many people entered the profession via this route. Graduate schemes such as those run by CASE and Arts Fundraising & Philanthropy provide a structured path to acquiring fundraising skills and knowledge. There are also graduate trainee schemes such as that run by Charity Works, which may also equip people with the knowledge and skills for a successful fundraising career, but in the case of the Charity Works scheme, qualification as a fundraiser is not the primary objective.

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4.11 Is 'qualification' worth it?

All the above are options for acquiring knowledge and skills needed to become a competent fundraising professional, though some use more robust methods than others. Even though none of these is actually required of new entrants to the fundraising profession, each one could become a component of a future qualifying process (see s7).

However there is pervading professional opinion that fundraising does not need a qualifying process, particularly one that involves formal education, and that all the knowledge and skills a fundraiser requires can indeed be learnt on the job. This is further discussed in s9.4.

Qualifying takes considerable investment of resources. So is it actually worth it? Does going through a qualifying process – signing off professionals as competent to practise (Lester 2009, p233) – make for more effective practice, or is the solution to the talent crisis caused by market failure simply to ensure that fundraisers receive better on-the-job training (which would presumably require better on-the-job trainers, who in turn would have had to have had better on-the-job training themselves).

There is scant research on the effectiveness of going through a qualifying process for fundraising (because there isn't one), but neither is there much research on the effectiveness of various components of a qualifying process – such as training courses or credentialing – where they exist.

However, there is some, which can be supplemented with research from other disciplines.

A study of 165 Swiss nonprofit organisations – comprising 45 per cent of the country's fundraising market – looked at whether it was worth those charities investing in the

professionalisation of their fundraising workforce (Betzler and Gmür 2016, p27).

For this study the authors looked at the 'fundraising capability' of an organisation, which they defined as the "ability and capacity of an organisation to raise money through the management of people and processes" (ibid, p30). Fundraising capability is the product of two sets or factors. One set of factors is called the 'Influence of professional fundraisers' and includes the level of professionalisation in fundraising and the formal level of fundraising education that fundraisers have. The other set of factors – 'rational organisation' – includes the use of "scientifically-based fundraising methods" and the "systemisation of fundraising processes" (ibid, p31).

An organisation's fundraising capability has a "significant" effect on both the level and growth of donations: in other words, the more professional and better educated in fundraising that a charity's fundraisers are, and the more they use systematic and scientific methods of fundraising, the more money they will raise.

In a similar vein, an American study found that charities run by professionals are more effective and efficient than those run by non-professionals, non-experts or volunteers (Hwang and Powell 2009). For example, nonprofits managed by someone with a professional degree (i.e. relevant to the cause or relevant to running the organisation) are associated with high levels of 'organisational rationalisation' (ibid, p274 – but see below); as are nonprofits whose staff and leaders participate in professional training and development (ibid, p275). 'Organisational rationalisation' is an amalgam of four factors: strategic planning, use of consultants, independent financial audit, and quantitative programme evaluation (ibid, p279).

This paper describes two different types

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Most fundraisers are aware that in many nonprofits tensions exist between them and substantive professionals (and often other managerial professionals, such as in PR and communications), leading to fundraising's epithet as a 'necessary evil'.

of professional expertise – one based on training in a particular subject or discipline (“substantive disciplinary area”) and the other on general management knowledge (ibid, p275). General management knowledge is based on the idea that organisations are alike and skills are transferable between organisations, and the skills of managerial professionals are tied to the “broader pursuit of organisational rationality”. Managerial professionals thus promote the spread of increased professional practice as they move around a sector (ibid).

Fundraising is a managerial profession in this respect, since fundraising professionals acquire a set of skills that can be applied to different roles in different organisations, irrespective of what the “substantive disciplinary area” – i.e. the cause – is. Although Hwang and Powell’s study doesn’t expressly investigate fundraising, their core argument applied to fundraising would be that the skills and experience that make for a professionally competent fundraiser are not necessarily contingent on their knowledge of the cause area.

For example, they found that organisations led by someone with a professional degree were scored more highly for organisational rationalisation than those led by someone without such a degree (ibid, p286). These degree holders were then categorised into “traditional” professions, “semi-professions”,

and managerial professions. Traditional professions – such as law – are “highly institutionalised” (ibid, p276), and the authors imply that traditional professionals may be quite set in their ways and not open to new ideas and practices. They describe semi-professionals as being “less steeped in disciplinary orthodoxy” and “freer to experiment with new ideas”. Examples of semi-professions given are criminology and child psychology (ibid).

When the impact of the three types of degree holder (traditional, semi-professional, and managerial) were split out, leaders with a degree in a traditional professional subject were not significantly different from organisations with ‘amateur’ leaders: traditional professionals are no more likely to embrace rational practices and tools than non-professionals (ibid, p287). In other words, knowledge of the cause does not lead to more professionalised practice.

There can often be tensions between “substantive” professionals and managerial professionals working at the same organisation. Hwang and Powell cite tensions between clergy and administrative officers, and at museums between curators and managers (ibid, p275). Most fundraisers are aware that in many nonprofits tensions exist between them and substantive professionals (and often other managerial professionals, such as in PR and communications), leading to

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fundraising's epithet as a 'necessary evil'.

There is still further evidence to be gleaned. A study into major gift fundraising at small American charities found that every additional piece of training undertaken by a major gift fundraiser is associated with an extra US\$37,000 to a nonprofit (Sargeant, Eisenstein and Kottasz 2015, p55).

Accredited PR professionals in Australia are more successful on a number of criteria than their unaccredited colleagues (Sha 2011). However, there is no similar research comparing holders of the CFRE with non-certificated fundraisers.⁴²

Finally, marketers with a marketing degree earn more than those without (Bacon 2017).

However, this only speaks to the value of a marketing degree in the jobs market, not whether a marketing degree makes one a better marketer; it may be that the marketing degree holders earn more than those without simply because employers arbitrarily value a marketing degree. Similarly, holders of the CFRE earn more than those without it (Aldrich 2017, p35).

Although there is not a huge amount of research that has looked at whether professional performance is improved by having completed formal training and education, the little research that has been done points towards the benefits of upskilling fundraisers through such mechanisms that are designed specifically to prepare them to practise competently.

┌ An organisation's fundraising capability has a "significant" effect on both the level and growth of donations: in other words, the more professional and better educated in fundraising that a charity's fundraisers are, and the more they use systematic and scientific methods of fundraising, the more money they will raise.

05 Pathways to qualified status in the professions

So far, this paper has looked how people get into fundraising and the ways in which, once they are in the profession, they acquire the skills and knowledge they need to practise competently (because most do not acquire these before they enter the profession). As we have seen, there is no “obvious” or “set” entry pathway, while no form of skills or knowledge acquisition is required or mandatory – all are optional. There is no process at the end of which a new entrant to fundraising can declare that they have ‘qualified’ as a fundraiser. True, they can obtain a fundraising qualification, but holding a qualification is not necessarily the same thing as being qualified⁴³ (Lester 2009, p226).

That fundraising does not have such a formal qualifying process that is delivered and awarded by its professional institute sets it apart from most other professions. So how do those other professions structure their qualifying processes?

This is something that has been analysed in detail in several academic papers by Stan Lester, a consultant and expert in professional standards and qualifying processes. This and the next chapter draw heavily from his work. One study conducted by Lester in 2007 looked at the qualifying pathways to 23 professions, including accountancy, civil engineering, market research, surveying, teaching and waste management (Lester 2009, p223, pp223-225).

There are generally two broad types of qualification route: An academic course-based route, and a non-academic route based on a

minimum level of practice/experience (ibid, p223, p228). The majority of professions combine the two approaches (ibid, p223).

5.1 Academic and non-academic

5.1.1 Academic

An academic route usually consists of a mandatory first degree or postgraduate degree in a subject relevant to the professional career, such as law, medicine, architecture etc (Lester 2009, p223, p228). In other words, to practise as a solicitor, one should have a law degree; to practise as a doctor, one should have a medical degree. Professions with academic entry requirements of course operate graduate entry pathways. But it is only in a few professions, particularly health professions, where there is a “close and formal” relationship between holding an academic qualification and being professionally qualified (ibid, p229).

As we have seen (s4.9), fundraising has no such academic entry route (just a single undergraduate degree), while the postgraduate courses available (s4.9) could never meet the demand for new fundraisers (and are not designed as entry-level courses in any case).

Some professions allow other types of qualification such as external diplomas to substitute for a degree (ibid, p228).

There is often a two-tier academic entry requirement with one relating to general academic ability and the other more explicitly concerned with gaining relevant professional knowledge. In this case, the first degree does not have to be in a relevant subject but there may be a requirement for foundation

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or conversion courses for non-graduates (Lester 2009, p228-9).

And it is an increasingly common practice to have university courses approved or accredited by the relevant professional body as part of its qualifying process, as marketing currently does (see s4.11), and the IoF used to do (s4.6), though with just one degree in fundraising available, this is not (currently) a realistic option for fundraising.

But having the relevant academic qualification is only the entry point to the qualifying process, as almost all of the professions in Lester's study also require new entrants to meet a minimum standard of practice (for example, fundraisers cannot sit for the CFRE until they have been practising for at least five years – see s4.8), or gain a specified period of (often supervised) experience, or both (ibid, p228, p229). Only in the health professions are there no alternatives to an academic entry route, and in those, the academic qualification includes required periods of practice (ibid).

5.1.2 Non-academic

Qualifying routes can also be “largely independent of higher education” for practitioners who have already gained significant experience, or have entered through a technician or para-professional route (ibid, p223). If fundraising's future qualifying entry route did include an academic component, then the requirement to have this might be obviated for those who had come through technician routes, which for fundraising could be apprenticeships (s2.2.1), face-to-face or field force fundraising, or even internships, volunteering or rag fundraising (ss2.3-2.5), if the experience gained were substantial (though rag fundraisers would by definition be graduates).

Accountancy might be thought of as a profession for which a degree is essential, but Lester reported that in 2007, 46 per cent of

newly-qualified accounts had come through a non-graduate route (ibid, p234).

Non-academic routes contain a practice/ experience requirement that the entrant must satisfy. This can be a period of supervised practice (Lester 2009, p229), or it can be a minimum time in practice before one can become qualified, which is typically two to six years (Lester 2009, p229).

It should not be thought that non-academic routes to qualification are the same things as informal ‘on the job’ training (s4.1) or only self-directed CPD (s4.5), since most have formal process for acquiring knowledge, such as structured CPD (s4.5) or formal training. It is not just about having completed a period of experience, but about having reached specified standards (ibid, p229). This applies equally to entrants coming in through an academic route.

5.2 Types of routes

Irrespective of the academic requirements (or lack thereof) for entry to the profession, once accepted, qualifying routes can be grouped into four types (ibid, p230):

1. **Sequential** – these normally involve a full-time course followed by a period of supervised practice
2. **Parallel** – part-time courses (often through day release) running concurrently with professional practice
3. **Integrated** – go beyond the parallel route by integrating the theory being learned with day-to-day practice in an holistic way (rather than theory being separated from practice as it is in the parallel model) using reflective practice
4. **Experiential** – emphasises learning through practice, supplemented when necessary by independent study (self-directed CPD) and short courses.

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In 2007 when Lester conducted his study, most professions were operating sequential or parallel routes. But half of the professions in the study provided or accepted alternatives to course-based qualifying routes for experienced practitioners or mature entrants, who qualify through satisfying practice-based requirements only (which in fundraising could apply to those transferring from other sectors). However, they are minority pathways, with most new entrants qualifying through course-based work. Only in market research and project management was non-course-based work the major entry pathway.

In 2007 there was a “clear trend” towards a “greater variety of routes to qualified status to accommodate, for instance, parallel and sequential pathways, recognition of prior learning, including from adjacent and subsidiary occupations, mature entry, and direct access to qualifying assessments for already experienced practitioners” (ibid, p231).

And there was also a shift from an academic requirement to a practice requirement (ibid, p231). But the academic requirement is not absent; academic requirements are not being replaced by practice requirements but the balance is shifting, often by having “better specified and more rigorously assessed practising periods coupled with a reduction in the length of the academic course” (ibid, p231).

5.3 Types of professional knowledge

This chapter has so far looked at the qualifying routes through which entrants acquire professional knowledge. There is one further thing to look at, which is how that type of knowledge is conceptualised – whether it is technocratic or reflective (ibid, p227).

The technocratic approach sees knowledge as stable and general, developed through research and codified in the literature and applied in practice; it teaches solutions. This was fairly dominant throughout the

second half of the 20th century, strongly influencing how professions sought to define themselves and induct new entrants – and one of the defining traits of professions is that they are underpinned by a body of knowledge that “requires prolonged study and specialist training” (see s1). The syllabuses of the IoF Academy courses (Certificate, Diploma, Advanced Diploma) could probably be described as technocratic knowledge.

The reflective approach – through practices such as action learning, reflective practice and critical action research – has become more prominent since the 1980s. Reflective practice is the “ability to reflect on one’s actions so as to engage in a process of continuous learning” (Habib 2017, p944) and involves “paying critical attention to the practical values and theories which inform everyday actions, by examining practice reflectively and reflexively” (Bolton 2010, page xx⁴⁴). As we have seen, the IoF adopts a reflective practice approach to its CPD programme.

Reflective practice was developed by US philosopher Donald Schön as a response to what he described as professional education’s undervaluing of practical knowledge and granting “privileged status to intellectual, scientific and rational knowledge” (van Manen 1995, p33).

Reflective approaches have not replaced the technocratic approach, but they have become “overlaid on it” (Lester 2009, p227), leading to a greater emphasis on entry routes based on work-based learning (ibid, p228); and a movement away from mastering propositional knowledge (often taught in the technocratic approach) towards a focus on a “deep understanding of a profession’s core principles”.

Before fundraisers get too carried away with this approach, and start earmarking it as the way forward, it should be noted that the

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professions that are doing this already have mandatory technocratic processes for mastering the profession's propositional knowledge (fundraising does not) and are so building on ("overlying a reflective approach on") this sound knowledge-based foundation. And second, what constitutes fundraising's 'core principles' (or even its fundamental propositional knowledge) would constitute several moot points, since there is not always widespread consensus on what these are.

5.4 Concluding remarks

Lester's study revealed a general trend towards greater diversity and flexibility in professional qualifying routes (ibid, p232).

The trend is towards clearer, more robust exit criteria (i.e. the criteria that one exits the qualifying process and enters the profession as a qualified member) giving professions more flexibility to evolve away from "route based proxies" (pass course x and gain y years' experience) towards requirements that are more directly concerned with the ability to practise, rather than the route taken (e.g. meet criteria a, b and c) (ibid, p233).

For fundraising, the questions are, if we are using "route based proxies", how many years' experience and what course; and for ability to practise, what are the relevant criteria to be met? This is the subject of the next section.

06 Standards and competence frameworks in the professions

The point of the qualifying pathway is to sign off on a candidate's ability to practise. So there have to be processes or frameworks to assess this ability to practise at the point of admission to the profession (Lester 2014b, p42).

Competence in a job is the “ability to perform tasks and roles to the expected standard” (Eraut and du Bourlay 2000, s2.1); or, as described by the International Standards Organisation in 2012, the “ability to apply knowledge and skills to achieve intended results” (Lester 2014a, p32). The European Qualifications Framework (on which the UK's educational qualification framework is based) describes competence as the “proven ability to use knowledge, skills and personal, social and/or methodological abilities in work or study situations and in professional and personal development” (Lester 2014b, p41).

So there is a very clear consensus that competence is about applying knowledge to achieve results.

The idea of ‘competence’ can be approached from two broad perspectives (Lester 2014b, p39): one based on the attributes, skills, behaviours and knowledge of individuals, and so is ‘internal’ to the candidate professional; and the other based on activities and outcomes, and social context, and so is external to the candidate professional.

Further, the internal perspective can be subdivided into technocratic/instructional and

behavioural approaches; while the external perspective can be subdivided into task-based and role-based approaches (ibid, p39).

It is worth spending some time describing each approach. And helpfully, much of this work has already been done by Stan Lester, who reviewed 40 professional competence frameworks from 2007-2012 (Lester 2014a, 2014b).

6.1 Internal (individual) models of competence

This perspective – which has been widely used in North America (Lester 2014b, p39), and has arisen from education, training or organisational development perspectives (Lester 2014a, p35) – aims to specify the most appropriate content (knowledge/skills and/or desired dispositions, such as behaviours, attitudes, motivations etc) for becoming effective and competent (ibid).

So competency “belongs” to the person, and is a profile or set of attributes that can change over time as the professional develops (Lester 2014b, p39) – i.e. becomes more proficient at some things and less proficient at others as their role changes.

The internal perspective is effective at developing programmes to prepare people for practice and assessing potential, but its usefulness in judging candidate professionals' ability to practise is more limited “as it does not indicate whether the person is able to draw together the various attributes and to use

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them intelligently to produce competent performance” (Lester 2014b, p40).

6.1.1 Technocratic/instructional internal models

These models identify curricula and training programmes focused on knowledge, skills and, sometimes, associated attitudes (Lester 2014a, p33). A technocratic model focuses mainly on a knowledge-based syllabus, with tasks expressed as an application of knowledge (ibid), but an instructional model moves beyond this to set learning outcomes using Bloom’s widely-accepted taxonomy,⁴⁵ so it is focused on what practitioners can do with the knowledge, rather than on the teaching inputs (Lester 2014a, p34). This is the approach, including the use of Bloom’s learning outcomes, taken by the IoF’s Academy courses, and therefore also by the EFA. Instructional models often represent requisite knowledge, skills and attitudes in a table arranged against activity headings (Lester 2014a, p34).

6.1.2 Behavioural internal models

These aim to identify the “behaviours, approaches and dispositions” of “superior” job performers (Lester 2014a, p33). For example, this is what Sargeant and Shang’s *Great Fundraising Report* aimed to do by identifying and describing the characteristics of fundraising leaders who had at least quadrupled their organisation’s voluntary income (Sargeant and Shang 2013, 2016). This research found, for example, that great fundraising leaders engaged in particular way of thinking – systems thinking – to solve problems, and could all be classed as ‘level 5 leaders’ according to Jim Collins’s widely-used taxonomy. Though of course this is pitched far above the entry-level this paper is concerned with.

The many recommendations, both informal and derived through research, for the desired characteristics of fundraisers (see s3) would also seem to adopt this behavioural approach,

with many specifying the characteristics/ dispositions such as “personal charisma”, “impeccable integrity”, “connector and mentor”, “intelligence and intellectual curiosity”. (Breeze 2017, p61), not to mention, of course, passion for the cause.

Current entry routes to fundraising therefore appear to be predicated on behavioural models of competence, whereas formal knowledge acquisition once in the profession (via the IoF’s syllabus, which teaches and assesses propositional knowledge) is founded upon a technocratic/instructional model.

But the technocratic/instructional model in play only assesses what practitioners know, not how this knowledge can be drawn together to produce competent performance; while, under the behavioural model, there is no assessment of whether characteristics such as passion for the cause are used intelligently to produce a competent performance: rather there is a somewhat pervading assumption that they will necessarily result in such a competent performance.

6.2 External (activity-based) models of competence

These are based on outputs and standards of action – i.e. what the candidate professional actually does, rather than the abilities of the practitioner to do them (what they know and what motivates them). They have been adopted in the UK and Europe, and in the UK are associated with National Vocational Qualifications (Lester 2014b, p40). It is more suited than the internal model to assessing application and practice, but provides little guidance about the characteristics that might help a candidate professional achieve the required standard of competence. The National Occupational Standards for Fundraising (s4.7) are an external model of competence.

This is where the division into task- and role-based models arises. The initial approach in

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the 1980s was via task analysis, breaking down jobs into component activities that could be taught, practised and “reassembled” in the workplace (Lester 2014a, p34). But there were limitations to this approach for other than the most “basic or procedural” types of work (ibid, p34) – in other words their “poor ability to reflect complex professional work” (Lester 2014b, p40), because the process of identifying tasks is often led by a small group giving their views on what relevant tasks are, rather than properly constrained research into what practitioners “actually do” (ibid, p40).

In response to such criticisms, an holistic approach based on role analysis soon emerged, using functional analysis – a “deductive approach to dividing up occupational roles into increasingly detailed descriptions of activity” (Lester 2014b, p40).

CFRE conducts what it calls a “job analysis” (which appears to be a task analysis) every five years to ensure its list of tasks and “key knowledge areas” – what knowledge to apply (if not its actual application) in practice as assessed through CFRE’s certification process – align with current professional practice (Aldrich 2017, p135, pp149-150).⁴⁶

There has been a trend in UK professions to move from internal behavioural frameworks of competence to external activity based ones (Lester 2014a, p36; 2014b, p47), with the body of knowledge being replaced as a “profession’s defining text” by a “standard for practice” and the criteria that need to be met (Lester 2014a, p36), with most UK professions now adopting an external approach (ibid, p35). However, in practice, hybridisation of internal and external models occurs. A “fairly common” hybrid approach in the UK is to include lists of the knowledge that practitioners ought to know (internal) alongside occupational standards (external) (ibid, p36).

6.3 Levels and scope of competence frameworks

Most – 83 per cent – of the professional competence frameworks analysed by Lester referred to a single professional level, such as social worker, chartered chemist, or accredited conservator (Lester 2014b, p46). If this were to apply to any framework for fundraising, then the professional level that fundraising competence qualifies would presumably be either ‘fundraiser’, or ‘chartered fundraiser’ (although it does not appear that chartered fundraiser status will be linked to the competence framework the IoF is developing, so accreditation as a chartered fundraiser will be via some other route – see also s7.2.1). Similarly, someone who holds the CFRE is a certified ‘fundraiser’ since the CFRE is a single level framework.

But some professions have multi-level frameworks that accommodate different grades, levels or descriptors of the profession. For example, the engineering framework run by the Engineering Council provides descriptors of technician, incorporated engineer and chartered engineer. The Chartered Institute of Personnel and Development’s framework has four levels according the job type (assistant, officer, manager and director). And the framework operated by the British Computer Society has seven levels from “basic user” to “advanced professional” (ibid).

And marketing offers apprenticeships at two levels – executive and manager (see s2.6)

6.4 Content of competence frameworks

Having considered models of competence frameworks, it’s time to look at their content. Lester (2014b, p48) was able to identify two broad categories of competency framework content: generic content and profession-specific content.

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Generic content covers the generic aspects of being a professional, and includes (Lester 2014b, pp48–49):

- i Ethics and professionalism (ethics, conduct, scope of practice, judgement)
- ii Developing self, others and the profession
- iii Managing self, work and others (including work processes and operation of the organisation)
- iv Communication and relationships with clients and the public.

Profession-specific (technical) content relates to competence that is specific to that profession and for most professions is far larger than the generic domain. It includes the sub-domains of:

- i Investigation, analysis and assessment
- ii Problem solving, planning and decisions
- iii Action and implementation
- iv Review and evaluation.

The profession-specific approach may not be obvious. Clearly, an analysis of different professions cannot describe under different topic headings the actual knowledge that is specific to the profession as each will be different. The specific knowledge required for fundraising is substantially different to that for project management, and different enough from marketing and PR (though with many similarities – the topic headings might be similar in particular).

So what the technical content refers to is the sequence of applying professional knowledge overlaid on each topic heading. Irrespective of whether we are talking about the knowledge appropriate to fundraising or project management, professionals (fundraisers and project managers) must first investigate, then solve and plan, then implement, then review and evaluate.

This composite model doesn't represent something that all the professional competency frameworks analysed by Lester used or conformed to. For example, three quarters of the professions included competencies based on ethics and professionalism (which means that 25 per cent did not!); and while 94 per cent had competencies based around action and implementation of professional knowledge, only half had competencies focused on review and evaluation.

Lester says (2014b, p49) that it is not his aim to suggest that all competency frameworks should follow this approach or place equal emphasis on each area of the cycle, but to offer a conceptual model for organising a profession's competency framework.

It could thus serve as a template for any future competency framework for a qualifying process for the fundraising profession. What such a qualifying pathway could be is the subject of the next chapter.

07 What is an appropriate qualifying pathway for fundraising?

Having examined how other professions structure their entry pathways, we can now consider how fundraising could construct similar entry and qualifying pathways.

The hypothesis of this paper is that fundraising suffers from a market failure whereby not enough people with the requisite skills are entering the profession. This compounds any systems failure that may be in place, because those fundraisers with the appropriate relevant skills are in high demand and so are not necessarily matched to the right jobs, in the sense the 'right' jobs are the ones where they are most needed.

To redress this market failure, fundraising needs to construct qualifying pathways that:

- a. Equip new entrants with the relevant skills to practise, as qualifying pathways in other professions do
- b. Sign them off as qualified to practise as fundraisers, as qualifying pathways to other professions do
- c. Design appropriate entry routes and competence frameworks
- d. Match those routes and frameworks to the ways that people currently enter the fundraising profession.

7.1 Recap

Recapping, current entry routes, which are not obvious and not set, are (s2):

- By accident
- Transfer from another sector (gradual – probably most likely to be associated with a gradual route)

- Direct entry by responding to job application as first career choice (intentional)
- Apprenticeships (intentional)
- Graduate trainee schemes (intentional)
- Internships (intentional/gradual)
- Voluntary role (gradual/intentional/accidental)
- University rag fundraising (accidental/intentional)
- Via face-to-face (F2F) or other field force fundraising (accidental/intentional/gradual).

The building blocks for a qualifying process for new entrants are in place and were described in s4. These are:

- ~~On-the-job learning~~
- ~~Self-teaching~~
- Mentoring
- Professional training
- Continuous professional development
- Professional qualification
- National Occupational Standards
- Certification/credentialing
- Higher (university) education
- Apprenticeship.

Self-teaching and on-the-job learning are struck through as they are probably not appropriate for a formal learning programme.

And in ss5-6 the theory and model on which to build a qualifying process is discussed.

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- Will it have an academic component?
- Which route will it follow:
 1. Sequential
 2. Parallel
 3. Integrated
 4. Experiential?
- How will it accommodate people transferring from other professions?
- Whether it will favour internal or external models of competence or a hybrid of the two; and if an internal model is used, whether it favours a technocratic/instructional or behaviour model.
- What will be the content of the competency framework, and what role will the National Occupational standards play in informing the framework?
- Will the pathway have just one qualifying outcome or will it offer qualifying routes for different grades (junior to senior) or different disciplines (direct marketing, major gifts)?

7.2 Potential components of a fundraising qualifying process

It is not the role of this paper to build such a qualifying pathway in detail or even make detailed recommendation what it might be.

But it can make some suggestions about what a qualifying pathway may need to include and to whom it should be available:

1. First, it must accommodate all new entrants who are currently entering the profession via the routes described in s2.
2. However as was hypothesised in s2.2, it is possible that many who apply directly to charities are being lost to the sector because they do not have the skills or experience employers are looking for and have no robust way of getting them (other than interning or volunteering). So a future qualifying pathway must be built with a

view to equipping people who have little prior experience of fundraising with those skills.

Apprenticeships are one way of doing this. Apprenticeships are often for non-graduates, though at least initially the fundraising apprenticeship will also be taken by graduates who have recently become fundraisers. What has often been missed in the discussion about graduate entry to fundraising (see s8.3) is that graduates don't have relevant skills for a fundraising career either, as the cause célèbre of Olivia Fuller testifies. And so a direct entry pathway for fundraising may also require a graduate entry component for graduates who do not wish to go through a junior apprentice role, otherwise graduates risk being lost to the profession (which begs the question that the profession does want to continue to attract graduates – see s8.3).

So the IoF should be considering relevant pre-entry courses and training that are designed specifically to equip potential new entrants with the skills and knowledge they need to be successful in getting their first fundraising job. Such a course should be fully incorporated into the qualifying pathway (not just the apprenticeship component), so that it would, for example, score CPD points, and be recognized by employers as a valid entry level qualification certifying expected skills and knowledge at that early career stage. The new Level 3 qualification designed to accompany the fundraising apprenticeship could fulfil this role as a standalone qualification.

3. One genuine possibility is a tiered qualifying pathway for accrediting fundraisers at different levels, so that people entering the profession can choose different career paths from the very start, or adapt in mid-career to pick and mix the knowledge they need.

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A related option is to have a hierarchical profession comprising fully qualified professionals (even if these are tiered or at different levels) and paraprofessionals, which could be database assistants, fundraising assistants etc. It could be that apprenticeships induct new entrants to junior or paraprofessional levels, and that this can then count towards full qualification of the profession or a higher level of the profession.

The entry pathway for paraprofessionals would provide a new sideways entry pathway to full qualification (see point 6 below).

4. The pathway for full qualification should (probably) have an academic component at some level, at least at the highest level, whether this is a postgraduate degree or an IoF professional qualification or a degree in a relevant subject such as PR or marketing. The research outlined in s4.11 provides support for the conjecture that professionals educated in managerial subjects (which includes fundraising) contribute substantially to the professionalisation, organisational rationality, and fundraising capability of an organisation. However, unlike most other professions where degrees in the professional subject matter are readily available, this is not the case for fundraising and is unlikely to change for a very long time.
5. The qualifying pathway must also accommodate the very high numbers of people who transfer from other sectors. Other professions with high numbers of transferees and/or mature entrants do not always require them to complete a lot of coursework.

One option is to develop a system of Accreditation of Prior Experiential Learning, which is used by some professions (Lester 2009, p228). APEL assesses whether a

candidate's prior experience is sufficient to contribute to or warrant qualification through the entry pathway, and is often collated in the form a portfolio.

Another option is to provide conversion courses that directly relate to transferees' existing knowledge to fundraising. For example, with 10 per cent of transferees coming from marketing, sales and advertising, a course outlining differences and similarities, and how commercial marketing needs to be adapted for, but not necessarily directly applied to, fundraising could be beneficial.

Such conversion courses could be targeted to fill any knowledge/skills gaps identified by an APEL assessment on the route to qualification.

Continuing to recruit people with transferable skills has been highlighted as a requirement of any entry pathway into higher education fundraising (More Partnerships and Richmond Associates 2014, p14).

With many people currently transferring from other sectors, it could be that the fundraising profession decides that it wants to maintain this entry route. Since pay is a barrier to entry to the profession (see s9.1), many talented people could be lost to the fundraising profession if their only route was graduate or non-graduate entry at a low-pay junior level and working their way up through the ranks.

Therefore, establishing a set pathway based on APEL and conversion courses is a clear and formal entry route for people who want to transfer from another sector, and may also help some people with career plans, for example, those who may want to take high paid commercial jobs now and move into fundraising later.

6. There is also a source of fundraisers coming sideways into the profession,

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through interning, volunteering, face-to-face/field force, and rag/student fundraising. The pathway should find a way to assess the experience and skills gained in these roles (perhaps through APEL with conversion course) and feed this into the qualifying path of those entering this way.

7. However the pathway should not formally include unpaid internships or volunteering (in the sense that being a volunteer is a formal – or even informal – part of the entry pathway, which would make volunteering just another form of internship; however, voluntary work will always add value to an applicant’s CV) and should put an end to these things. With a structured qualifying pathway in place – particularly through pre-entry qualifications – there should be no need for them anyway because the pathway will provide ways for new entrant to gain the skills that internships and volunteering currently do.

There are two big challenges this paper has made no attempt to answer.

The first is around the type of route it should follow (sequential, parallel, integrated, experiential) and the type of knowledge it should contain (propositional/technical or reflective). This is because these are two very big questions, particularly the latter, that require considerable further discussion, particularly on whether the type of CPD run by the IoF, and the National Occupational Standards, can be adapted into a competency framework.

The second is about what type of competence model should be adopted, external or internal (and which type of internal model – technical/instructional or behavioural), and the content of that competency framework (see s6.4).

- External models are about what people can do.

- Internal technical/instructional models are about what people know.
- Internal behavioural models are about what people are (authentic, passionate about the cause, etc.).

So to an extent, which model is chosen will be contingent on the types of people we want to attract on to the qualifying pathway. This is addressed in section 8.

It would be unrealistic to expect the qualifying pathway to be built in one go. This would take too much time and be too big a job. In the meantime, people are still falling into fundraising by accident or being turned away because they don’t have the skills and experience that someone transferring from another sector does.

But the pathway can be built piecemeal. The new apprenticeship standard is the most obvious first building block that will be put in place. Introducing a points system for CPD could be another easy fix. But what is needed urgently is work on obtaining consensus about the type of qualifying pathway to put in place so that, in the medium term, there is a strategic vision for a variety of entry routes, and so existing entry routes (apprenticeships, face-to-face, graduate entry) and qualifying processes (such as CPD and training) can be gradually bent towards this strategic vision.

The IoF has been working on a Fundraising Competency Framework – which it hopes will show “new entrants to the sector what fundraising is all about, and also how we can all progress in our fundraising careers” – since at least April 2019 (Abrahams 2019).

This framework appears to be an internal model (see s6.1) that will list desired behaviours and attitudes (internal behavioural – see s6.1.2) alongside required skills and knowledge arranged in a table against activity

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By definition there will be no more accidental fundraisers, because once the pathway is in place, everyone will be making deliberate decisions to enter the fundraising profession; no-one will find themselves on the qualifying pathway to becoming a fundraiser by chance or accident.

headings (internal instructional- see s6.1.1).

The IoF competency framework is not yet being considered as a route to formal 'qualification' as a fundraiser, and it will not be tied to individual chartered status - in other words, a fundraiser will not necessarily have to pass through the competency framework to be classed as a chartered fundraiser, which will be assessed by other means.

HEFCE's report into HE fundraising found support for what it called a training-based "learning route" that could be developed into formal qualifications, and suggested that a university could devise this in partnership with sector groups (More Partnerships and Richmond Associates 2014, p11).

But what about the accidental fundraisers? Shouldn't an entry pathway accommodate them as well? No, not really. The qualifying pathway is designed for people who make a decision to enter the fundraising profession by showing them the steps they need to take to action that decision. So by definition there will be no more accidental fundraisers, because once the pathway is in place, everyone will be making deliberate decisions to enter the fundraising profession; no-one will find themselves on the qualifying pathway to becoming a fundraiser by chance or accident. Even if someone found

themselves by accident involved with charity fundraising, they would in future need to go through the qualifying process to become a member of the profession, and that would require a deliberate decision. Would-be accidental fundraisers will need to make either a decision to join the profession or one to walk away from it.

Anyway, a 'profession' composed of people who joined it by accident isn't really the type of profession we're aiming for, is it?

7.2.1 A note on chartered status

In February 2020 the Institute of Fundraising was granted chartered status by the Privy Council and will henceforth be called the Chartered Institute of Fundraising.⁴⁷ There are two components to chartered status: one for the professional institute itself, and a qualifying process by which individual members of the institute can gain individual chartered status. The IoF has not yet decided upon a process, but it has suggested two routes to individual chartered membership: by qualification and by experience (Xavier 2019b).

The qualification route would allow holders of IoF professional qualifications to be eligible for chartered status (so gaining such a qualification wouldn't automatically confer it; it just makes them eligible). And the experiential route would be open to anyone

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who meets “predetermined criteria” but does not hold an IoF qualification or “approved equivalent”, and would be underpinned by an assessment and approval process that might include interviews and assessment days (ibid).

Once individual chartered status has been achieved, the member would need to maintain this through CPD (ibid), which might suggest the IoF needs to move to a more structured CPD than the self-directed CPD it currently offers (see s4.5). And as has been mentioned previously, the competence framework currently under development is not at this stage being linked to an award of individual chartered status.

08 What type of applicants ought we attract into the qualifying pathway?

Having considered what types of qualifying pathway (encompassing a variety of entry routes) could be built to redress the market failure in the fundraising labour market, it's time to think about the types of people we want to attract into that pathway, and how best to go about attracting them.

Deciding on who we want as fundraising professionals might have a bearing on what type of competence model is put in place. This chapter considers three issues that might be relevant in solving this issue.

1. Is fundraising an art or a science – and so should the fundraising profession aim to recruit 'artists' or 'scientists'?
2. What is the right attitude of new entrants to the labour market – and so should the fundraising profession aim to recruit so-called 'players' or 'purists'?
3. Should there be graduate entry into fundraising?

8.1 Is fundraising an art or science?

The question of whether fundraising is an art or a science is one of fundraising's most perennial⁴⁸ and, frankly, probably most meaningless, debates. But it is also one that

polarises the profession because it is not just about what fundraising is or what fundraisers do (descriptive, 'fundraising is an art/science and here are the reasons why'); but what fundraising *ought* to be, which gives it a normative flavour and takes it into the domain of fundraising ethics.

From a descriptive perspective the debate is important because the skills and experience needed to be an 'artist' may be different to those needed to be a 'scientist' and so this debate affects and influences questions about appropriate pathways into fundraising, including what is the appropriate knowledge that fundraisers ought to acquire.

From a normative perspective it is important because if fundraisers ought to be 'artists' then they will probably need to have different qualities than if they ought to be 'scientists', may have different personality types (Feist 1998, 1999), and may think differently and approach problem solving differently – it's an open question whether the great fundraisers and their way of thinking analysed by Sargeant and Shang (2013, 2016) were 'artists' or 'scientists'.

If fundraisers ought to be 'artists' then they will probably need to have different qualities than if they ought to be 'scientists', may have different personality types, and may think differently and approach problem solving differently.

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An internal behavioural competence model for ‘artists’ might therefore look very different to an internal behavioural model for ‘scientists’, even if the external role/task based competence models would have them performing exactly the same roles and tasks.

In her book *The New Fundraisers*, Beth Breeze looked at the art vs science debate through a content analysis of ‘how-to’-type fundraising books, a debate which she characterises as (Breeze 2017, p92):

- Science – fundraising is based on an objective body of knowledge that can be taught
- Art – fundraising relies on subjective judgements and instincts that only some people have.

The how-to books distil the debate into three polarised statements (science on the left; art on the right) (ibid, p103):

- ‘Fundraising is easy’ (and so anyone can do it providing they have the right instruction) (science) vs ‘fundraising requires special attributes’ (art)
- ‘Fundraisers need instruction’ (science) vs ‘fundraisers need inspiration’ (art)
- ‘Anyone can learn fundraising skills’ (science) vs ‘fundraiser exceptionalism’ (only certain types of people can be fundraisers) (art).

The idea that fundraising is ‘easy’ may seem to undercut the scientific side of the argument, since science is not generally easy. But the underlying principle seems to be that it is one of the ‘easier’ sciences, provided you learn the basic science behind it. Some authors think that it is incredibly easy: one author cited by Breeze (ibid, p92) reckons it comprises no more than common sense, intuition and a “a few rules of thumb”.

The how-to books that fall on the artistic, ‘fundraisers need inspiration’ side of the



IN HER 2017 BOOK *THE NEW FUNDRAISERS*, BETH BREEZE LOOKED AT THE ART VS SCIENCE DEBATE THROUGH A CONTENT ANALYSIS OF ‘HOW-TO’-TYPE FUNDRAISING BOOKS.

debate often omit instructional elements such as providing checklists and sample DM scripts, and are often “contemptuous” of such instructional approaches (ibid, p106). One author cited by Breezes talks about the “mechanical manipulation” he says is typified in the scientific approach to fundraising (ibid, p135).

Breeze (ibid, p115) draws further detail on the art of fundraising from the interviews conducted for her study, with the consensus that the “non-technical” side of fundraising (i.e. the art of fundraising) requires a “tailored and highly personalised, even idiosyncratic, interaction which is difficult to capture within the body of codified knowledge and best practice”. The art of fundraising “goes beyond the mechanical aspects” (though as Breeze says, recommendations to do this – such as to ‘love’ donors – are of “limited value without insights or examples of precisely how this can be achieved”) (ibid, p118). Art is also about “being” rather than “doing” and is contingent on “inherent characteristics”.

The art side of the debate views knowledge about fundraising as necessary but not sufficient, and there is more to fundraising than possession of a particular skill set. It is the art of fundraising that ensures successful implementation and results (ibid, p114).

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The polarisation of the ‘is fundraising an art or science?’ debate inevitably means that it resolves into false dichotomies – e.g. fundraisers need instruction or inspiration, but not both. But of course they could, and probably do, need both.

Setting out and critiquing the ‘art vs science’ debate is a paper in itself. For example, there’s nothing radical in saying that you need more than skills and knowledge to be competent in a profession; most professionals need an ‘art’ side – doctors for example need a good bedside manner, in other words, the ability to conduct relationships with their patients. The art side of the debate in fundraising simply begs the question that these skills cannot be taught but are inherent to the professional. And yet there are plenty of courses that aim to teach medical staff about such things,⁴⁹ while one study found that graduates with a liberal arts background do well at medical school because they are good at the ‘art’ aspect of medicine (Stratton et al 2003). The consensus on the art of fundraising is that art is needed because ‘every donor is unique’ (Breeze 2017, p115). So is every patient, but that does not mean doctors aren’t scientists.

The polarisation of the debate inevitably means that it resolves into false dichotomies – e.g. fundraisers need instruction or inspiration, but not both. But of course they could, and probably do, need both.

And believing that everything about fundraising can be taught is not the same thing as believing that everyone can learn it. Perhaps some people simply do not have what it takes to learn how to be fundraisers. However, from the perspective of this paper, it should be apparent that the view that

fundraising is an art appears to be a major driver of the recommendations for desirable traits such as authenticity and passion for the cause, and the downplaying of technical knowledge. An art of fundraising would push the profession towards an internal individual behavioural model of competence, derogating the propositional knowledge of technical/ instructional models, partly because fundraising is relatively ‘easy’, but mainly because the things fundraisers need to do are contingent on their inherent subjective judgement and cannot be taught.

Entry to the profession moves away from what people know, or are capable of being taught, in favour of who people are. Entry to the profession becomes about recruiting artists rather than scientists. Before any qualifying pathway for fundraising starts to be built upon this founding principle, much, much more understanding of the current state of research on personality types and attributes of artistic and scientific creativity is needed (e.g. Feist 1998, 1999).

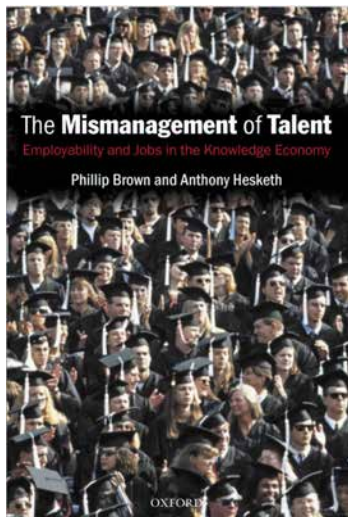
8.2 Purists vs players – What is the right attitude of new entrants to the fundraising labour market?

Work funded by the Economic and Social Research Council at the start of the 21st century – published in the book *The Mismanagement of Talent* (Brown and Hesketh 2004) – looked at graduate employability, and suggested two “ideal types” of graduate

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entering the labour market: 'players' and 'purists', which are best understood as two poles on a continuum (Brown and Hesketh 2004, p125; Brown 2005, p4).

Purists believe in meritocratic competition and aim to "win a competitive advantage through a meritocratic race", and so be "true to themselves" (Brown 2005, p4) - meaning that they are successful because of who they are and how good they are, not because they played a particular 'game' or presented a particular version of themselves to employers to get a job. For purists, who have a "clear sense of vocation" (Brown and Hesketh 2004, p141), "work is an expression of the self" (Brown 2005, p4). Nonetheless, they expect to be rewarded with the right job, and have a high degree of faith that the jobs market will match the right people to the right jobs (Brown and Hesketh 2004, p138), for they believe that they are that right person (ibid, p141).



RESEARCH BY PHILIP BROWN (L) AND ANTHONY HESKETH (R) - PUBLISHED IN THE 2005 BOOK *THE MISMANAGEMENT OF TALENT* - IDENTIFIED TWO IDEAL TYPES OF JOB APPLICANT: 'PURISTS' AND 'PLAYERS'.

Players by contrast see employment in the labour market as a "positional game" and will seek to "sell themselves in ways that conform to the requirements of their employers"; they are aware of the need for "self-promotion" and will "package themselves as the situation requires" (Brown 2005, p4-5). So they do their research on a company and try to "package" themselves as the kind of person they think that company is looking for.⁵⁰

However, players also recognise the need in this positional game to be "economical with the truth" - to promote certain aspects of themselves that they think recruiters might be interested in, and downplay things that might be detrimental to their chances of getting a job (Brown and Hesketh 2004, p131). At university, they will take on voluntary work and extra-curricular activities (one example given is "charity organiser" - but this could just as well be rag fundraising) in order to add value to their CVs, not just because they were doing those things for their intrinsic value - they had "mixed motives" (Brown and Hesketh 2004, p130; Brown 2005, pp4-5). And they will - if they can - make and use personal connections to get ahead in the labour market (Brown and Hesketh 2004, p131). Doing these types of things is precisely the kind of advice offered by the 'how to get a job in fundraising' blogs summarised in Table 2.1.

While these are the two ideal groups, they nonetheless form part of a continuum, and graduates interviewed for the research fell in roughly equal proportions into three groups: players, purist and those who displayed both characteristics, particularly "purists who were adopting players tactics" (Brown 2005, p5), and many purists come to the conclusion that they will not find a job unless they adopt player tactics (Brown and Hesketh 2004, p145).

But while these are the differences between players and purists, two commonalities should be noted. The first is that both types are equally

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ambitious, equally motivated, and equally willing to make an effort in the labour market (Brown and Hesketh 2004, p125). And second, they are equally knowledgeable. All the graduates interviewed for Brown and Hesketh's study were high-achieving graduates seeking elite recruitment to managerial positions through assessment centres⁵¹ (Brown 2005, pp2-3).

A study in 2011 looking at graduate recruitment issues in the social care subsector of the Scottish voluntary sector took Brown and Hesketh's ideal types of players and purists as the basis for a potential solution (Hurrell et al 2011, p351).

The solution to what this study's authors identify as a systems failure – which, remember, is that there are sufficient entrants to the profession with the right skills, but they are not being matched to the right organisations – should be to recruit purists (and they are talking about graduates only).

They suggest the way to analyse this systems failure is by using something called the Attraction Selection Attrition (ASA) Framework (Schneider, Goldstein and Smith 1995), which states that people are attracted to organisations that share their values, and stay with them if this matching of values persists (Hurrell et al 2011, p340). And so nonprofits should seek to attract people with commensurate values (Hurrell et al 2011, p340-41) – and as we have already seen in the discussion about desired traits of new fundraisers (s3) and the debate about whether fundraising is an art or a science (s8.1), charities are very focused on attracting candidates with the right values or traits, such as passion for the cause.

Such candidate professionals are likely to be purists who are “likely to possess an affective commitment to working in the sector” (Hurrell et al 2011, p351). According to Hurrell et al,

purists value the nature of work rather than what they are being paid to do it – because they are affectively committed to it (or perhaps they are ‘passionate about it?’).

Charities should therefore be using value-based recruitment to find purist graduates “who remain true to their own organisations and choose to work for organizations whose values fit their own” (ibid, p350).⁵²

But more than this, you can – and, apparently, should – pay purists less than players by using an “altruism pay-off” (ibid, p340), because purists are prepared to accept lower salaries to do work that is commensurate with their values: “Although higher pay is desirable, the altruism payoff, in which employees are willing to trade lower salaries against task significance, means that the first-order priority has to be attracting purist graduates” (ibid, p352). This is the attitude that leads to sincere recommendations that those trying to get into fundraising should spend time in unpaid internships in order to get a foot on the career ladder.

Yet while purists want to be their authentic selves, they also want to be recognised for having won a meritocratic race, and rewarded with appropriate credentials, jobs and remuneration that reflect their individual achievement (Brown and Hesketh 2004, p137). The reward for winning the meritocratic race being offered by Hurrell et al is not material (i.e. a decent salary) but simply the privilege of working in the voluntary sector.

This solution of attracting purist graduates (remember, Hurrell et al's study is focused on graduate recruitment) is presented as a solution to a systems failure. This is where there are sufficient people with relevant skills and knowledge entering the profession but they are not properly matched to the right organisations (Hurrell et al 2011, p340) – and so the way to match them to organisations is

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through their values rather than their skills, which is what sets the purists apart from the players, because their skills and knowledge are the same.

However, what if the problem is not a systems failure, but a market failure? A market failure occurs when there are not enough people with appropriate knowledge and skills in the labour market (Hurrell et al 2011, p340) – and so the solution is to recruit more people with the right skills, and anecdotal evidence suggests that a market failure is what is being experienced by Scottish fundraising (Kerhanan and Anderson 2017). The Scottish study looked at graduates entering into management roles rather than service delivery roles (social care) and so looked at graduates who had prepared themselves for such careers by studying for business or related degrees (the article does not specifically consider or even mention fundraising at all), and this paper has already discussed how leaders with managerial professional skills are better than those with traditional professional degrees (Hwang and Powell 2009, and see s4.11). And so the choice is between:

- Players with appropriate skills/knowledge
- Purists with appropriate skills/knowledge.

Skills/knowledge is not a variable so the choice is only on the attitudes of candidate professionals, and the recommended solution to the issues in the Scottish voluntary social care sector is to go for the purists.

However, most people entering fundraising do not enter already holding a vast array of appropriate skills and knowledge. In this case, the choice is between:

- Players without appropriate skills/knowledge
- Purists without appropriate skills/knowledge.

Since both groups have as little knowledge about fundraising as the other and are both going to have to be trained on the job (or teach themselves), perhaps it is still better to recruit purists, since their values stand more chance of staying aligned with the values of the charities they are working for (and you can pay them less!).

However, many people do enter the sector with some appropriate skills and knowledge. They have transferable skills from other professions (where they might have got where they are by being players). Or they might have interned or volunteered (they may have been doing this

While ‘purists’ want to be their authentic selves, they also want to be recognised for having won a meritocratic race, and rewarded with appropriate credentials, jobs and remuneration that reflect their individual achievement. The reward for winning the meritocratic race is often not material (i.e. a decent salary) but simply the privilege of working in the voluntary sector.

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because they are purists, or they may have been players who are volunteering in order to make their CVs look good so they can get their first charity job).

Or they might be coming in via face-to-face fundraising (Flow Caritas 2014) or other field force fundraising. Or they have done the one fundraising degree available, or they have a marketing or PR degree (which contain the most academic content applicable to fundraising) or a business degree; or they have done the IoF's Certificate in Fundraising (some people do actually take this course in an attempt to gain an entry-level qualification, even though it is not designed as such).

In all these cases, those people who have come in through these routes could be as much players as they are purists – ask yourself whether Olivia Fuller did the things she did to get her first job because she was a purist or a player, or somewhere else on the continuum, perhaps a purist adopting player tactics; and if she were a purist, would her faith in the labour market to match the right people to the right jobs have been shaken by her experiences?

This would sometimes give fundraising recruiters the choice of:

- Players with some appropriate skills/knowledge
- Purists without appropriate skills/knowledge.

It is a valid inference from anecdotal evidence gleaned through social media, blogs, practitioner literature, and as summarised by Beth Breeze (2017, p61, and see s3 on desirable traits of fundraisers), and from the debate about whether fundraising is an art or a science, that many – and probably most – fundraising recruiters/employers would opt for the unskilled, unknowledgeable purist, because they rate values more highly than skills/knowledge. Purists could thus become

conflated with 'artists', and so if fundraising is an art, then it is purists with the right values the profession needs to recruit.

This approach to purist/artistic fundraiser recruitment is encapsulated perfectly in this paragraph from the Commission on the Donor Experience's final report (2017, p11), which has been used previously but bears repeating:

"While fundraisers should exemplify both passionate commitment to their cause and appropriate professional standards, passion is usually more valued by donors than technique or slick professionalism. Though they greatly value competence and commitment, many donors are suspicious of business practices and overt commercialism from the charities they support. Many would prefer to see a different, more distinctive, more obviously values-led approach. Donors generally will prize passionate belief in the cause ahead of technical abilities, particularly in sales and marketing, which donors often see as inappropriate."

Note incidentally the completely unnecessary use of the word 'slick' as a pejorative term (an implied insult) to describe being professional: being professional is associated with being 'slick', the dictionary definition of which is a "shrewd, untrustworthy person",⁵³ which in turn is often used to describe salespeople.⁵⁴

In a piece of rhetorical sleight of hand, the Commission on the Donor Experience has associated in the reader's mind knowledgeable, competent fundraising with the worst stereotypes of untrustworthy salesmanship, or the "mechanical manipulation" of fundraising as science.

And yet – ironically and perhaps counterintuitively – focusing on values, in the absence of skills and knowledge, opens the door for more players to enter fundraising.

The modus operandi of players is to research

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their target employer, to “decode the winning formula” (Brown and Hesketh 2004, p127), and then package themselves as the kind of employee that their target organisations are looking for – players are “willing to act the part, with all its theatrical connotations” (ibid, p130). Players offer you what you are looking for, but perhaps being “economical with the truth” while they do it (ibid, p131). If organisations are looking for people who have an authentic passion for the cause ahead of people who have the skills necessary to do the job, that is a big clue to players about how to decode the formula that will get them a job in fundraising.

Players can then ‘method act’ their role by following the advice of the ‘how to get a job in fundraising’ blogs (Table 2.1) – interning, volunteering, making connections, reading books, etc. This might not only put them on a par with purists – those whose values are genuinely aligned with a particular charity’s and who don’t necessarily see a need to do any of these things – it might actually put them ahead.

Whereas players in the commercial sector “had to convince recruiters that one was sold on the company”; the analogue for the charity sector would be to convince recruiters that one was sold on (i.e. had passion for) the cause.

Fundraising recruiters may consider they are confident that they will spot such fakery during the recruitment process. However, players are sceptical that employers will be able to see through such an act (ibid, p132); while Brown and Hesketh’s research suggests that recruiters who “like to imagine they can spot those who fake it” are “not immune from” the tactics players employ (ibid, p12).

The American comedian George Burns famously said that if you can fake sincerity, you’ve got it made.⁵³ Perhaps to get a fundraising job, if you can fake passion for

the cause, you’ve got it made.

And yet, in jobs where technical expertise is required, “player tactics held little credence without a sound technical knowledge” (Brown 2005, p8). The key to finding the right entrants to fundraising is the skills they have, which once again takes us back to the need to build a skills-/knowledge-based entry/qualifying pathway.

Further research on the tactics used by people to get jobs in fundraising could be valuable.

8.3 Should there be graduate entry into fundraising?

The debate about graduate entry to fundraising sprang to life in the spring of 2019 when fundraising consultant David Burgess set up the NonGraduatesWelcome (NGW) campaign.⁵⁶

Burgess had noticed that many job adverts for fundraising positions required the applicant to hold a first degree (the degree was listed as ‘essential’ in the person specification). This is a requirement for an unspecified degree, not one in a relevant subject such as PR, marketing or events management.



DAVID BURGESS, FOUNDER OF
THE #NONGRADUTATESWELCOME
SOCIAL MEDIA CAMPAIGN

NGW’s core contention is that an unspecified degree is not necessary or relevant to any fundraising job, and so no fundraising job should ever be advertised requiring applicants to be holders of Bachelor’s degrees (which inevitably rules out any requirement for a Master’s degree since a first degree is an entry requirement of a Master’s).

Instead, NGW wants charities to tell applicants what skills, abilities, knowledge and experience

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are needed to be successful in the role, so that each applicant can decide how best to demonstrate their suitability. They also say this applies to relevant degrees. So rather than require, say, a degree in marketing (for a marketing role) or events management (if it is an events role), an employer should list the skills they are looking for, because the degree is only one way a person could have acquired these skills.

One of the main drivers for NGW is equality, diversity and inclusion, arguing that because people from disadvantaged backgrounds are less likely to go to university, they are being discriminated against in the fundraising labour market by an arbitrary requirement that they should have gone to university.

NGW states that fundraising is a skilled job, listing skills that easily fall in to in the art and science camps (though are not really mutually exclusive):

- **Art** – creative thinker, storyteller, empathetic hearts.
- **Science** – critical thinker, strategist, enquiring mind.

NGW is not saying that organisations should stop recruiting graduates. The campaign is “not to diminish graduates” but to “open the door to more people, not lock them out”. But they say that the skills that graduates learn, such as critical thinking, need not only be acquired via university education.

Finally, NGW state that fundraising recruitment is broken – which indeed it is, for all the reasons this paper explores.

In respect of a qualifying process for fundraising, NGW’s arguments pose several questions. First, their position precludes a graduate entry pathway to fundraising. Any future qualifying pathway ought to contain entry routes for nongraduates, such as

apprenticeships, transferring from other sectors, sideways via face-to-face/field force, and directly on to the full qualifying route. Indeed, one such entry route – apprenticeships – will be in place this year (Xavier 2019a) and, at least initially, this will be used to train graduates who are already in their first job.

The question is whether in the future the apprenticeship becomes an entry-level qualifying pathway for all new entrants (including graduates). The qualification/award associated with the apprenticeship is set at Level 3 (A-Level standard), which is well below the level of study (Level 6) that graduates will have studied during the last year of their degree. It is a genuinely open question whether a different qualifying pathway should be pitched at graduates who do not want to become apprentices or for whom an apprenticeship is not appropriate. So the question is whether there should be a graduate-entry pathway into fundraising, as there is for marketing.

However, under NGW’s position, there can be no future graduate entry pathway, because no job in fundraising should require an applicant to hold a degree. This means there would be no point in developing a future academic entry route into the qualifying pathway – such as through more degrees in fundraising, or linking degrees such as marketing and PR to an IoF professional qualification – since those academic routes would confer no advantage in the labour market.

Second is the assumption that no job in fundraising requires a degree, or to be more precise, the skills that graduates acquire by doing a degree. Studying for a degree is about more than acquiring knowledge of the subject being studied. Bachelor’s degree study aims to inculcate in students a whole host of skills and abilities that are transferable between subjects, such as (Quality Assurance Agency 2014, p26):

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- Evaluate evidence, arguments and assumptions to reach sound judgements and to communicate them effectively
- Have the qualities needed for employment in situations requiring the exercise of personal responsibility, and decision-making in complex and unpredictable circumstances
- Critically evaluate arguments, assumptions, abstract concepts and data (that may be incomplete), to make judgements, and to frame appropriate questions to achieve a solution – or identify a range of solutions – to a problem
- Deploy accurately established techniques of analysis and enquiry.

NGW's argument is that there are other ways than degree study to acquire these skills, and just because someone has studied at university doesn't mean they will be good at these skills. Both of which are true.

Nonetheless if it is accepted (which it may not be) that some fundraising roles require these types of skills, then NGW's argument is akin to saying: 'This role requires skills A, B, and C, but we do not require the successful applicant to have been taught skills A, B and C, as they may have acquired them through other routes' – that these skills might be "caught" rather than taught.

And again, this is true, they may have acquired those skills through other routes. There is then a challenge about how to assess whether the applicant really has the skills they claim to have. And by which other routes (on-the-job training, "informal conversations with other fundraisers", attending conferences) did they acquire these skills, and how good were those routes at equipping them with those skills? But more than this, if learning skills through degree study is not required for a fundraising role (even though the skills themselves are

required, but they can be acquired through other routes) then neither is learning through any other form of academic study required for fundraising: the IoF Academy's courses are equally unnecessary, because while they equip a fundraiser with particular propositional knowledge, they are not the only way a fundraiser could have acquired that knowledge. And so, by NGW's reasoning, no job should ever require that an applicant has the Certificate, Diploma or Advanced Diploma in fundraising, which might be an outcome that some fundraisers would agree with.

Returning to the EDI argument, NGW has been established primarily to fix the broken part of entry into the fundraising profession that discriminates against nongraduates. However, if fixing this broken model of entry to the profession puts in place entry routes that address EDI issues, such as apprenticeships, while building a full qualifying pathway that is open to people from all backgrounds, does NGW's argument carry such normative force?

In a future situation with entry routes into fundraising from many directions, the question fundraising must ask is whether it wants graduates in the profession, and whether having a cadre or cohort of people who have studied at university adds to the profession and brings value that would be absent if there were no graduates; or whether what skills and qualities graduates bring to the profession could be provided just as well without them.

A logically permissible, though admittedly unlikely, outcome of NGW's position is a profession without any graduates at all, since every job that is advertised without requiring applicants to hold a degree could go to a non-graduate. One detrimental outcome would be the severe diminution of the academic branch of the fundraising profession, since many of those researching fundraising – such as Beth Breeze and Claire Routley – were

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formerly fundraising practitioners. So with no graduates in the profession, there would be no supply of practitioners into the Academy to research fundraising. Neither would there be any postgraduate courses on fundraising (at least none taken by members of the fundraising profession). Some practitioners may not consider this a great loss.

So the questions are:

- If the profession decides that it wants to attract and recruit graduates, then should the qualifying pathway include a graduate entry route?
- If the profession considers that graduates are superfluous – nice to have but not really essential or necessary – then no graduate entry route is required.

This is a genuinely open question.

To help answer it, research on auditing the skills of all fundraising roles is needed to ascertain precisely which graduate skills (if any) are needed for which roles, particularly leadership roles of the type researched by Sargeant and Shang (2013, 2016).

09 Barriers to establishing a qualifying pathway for fundraising

Having considered what components a qualifying pathway into fundraising might contain, and some issues about the types of people the profession might wish to attract on to that pathway, it's time to consider some barriers that might prevent such a pathway being successful, and even being established in the first place.

First, this paper considers three possible barriers that might prevent a regular flow of people on to the pathway:

- Low pay
- Poor public understanding of fundraising as a career
- Lack of promotion of and careers advice about fundraising.

And one barrier that might stand in the way of a qualifying pathway ever being constructed:

- Negative attitudes about a qualifying pathway in the fundraising profession.

9.1 Pay

The Foundation for Social Improvement (2019) has found salary expectations to be the main reason for being unable to recruit staff to small charities for most of the last decade, even though this has been steadily falling from a high of 58 per cent of charities in 2012/13 to 18 per cent in 2018/19.

Uncompetitive pay has been found to be one of the biggest barriers to entry to the Scottish voluntary sector (Nickson, Warhurst, Dutton and Hurrell 2008; Hurrell et al 2011, p347; see

also Kernahan and Anderson 2017), even though some people will join the voluntary sector because its values match their own, despite it paying poorly (Hurrell et al 2011, p349), who then have high levels of job satisfaction because of the match with their values (Nickson et al 2008, p32). It's been suggested that this 'altruism pay-off' could be used to attract a particular type of new entrant – 'purists' – who are motivated more by values (Hurrell et al 2011, p340) (see s8.2).

That employers could utilise (exploit?) the 'altruism pay-off' to attract new entrants to the profession would appear to receive support from the finding that only seven per cent of people who express an interest in working in fundraising are motivated by the salary they could earn (Institute of Fundraising 2019, p10), even though 53 per cent of people think a salary is an important aspect of a career overall (ibid, p7). Only 17 per cent of those expressing an interest in working in fundraising think that fundraising offers the potential to earn a good salary (ibid, p15), while 38 per cent of 16-24-year-olds think fundraising will pay them less than other professions (ibid, p11).

Low pay/poor salary expectations are thus a barrier to entry to the voluntary sector. However, the barrier may be mitigated if charities can use the altruism pay-off in order to recruit the 'right' people – purists who are 'artists' motivated by values rather than salary and tangible remuneration.

In any case, we know many people are not

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“We stand condemned...We have never really approached the academic world and careers advisors in any meaningful way... We have failed miserably to promote the voluntary sector as a career opportunity...”

RESEARCH PARTICIPANT COMMENTING ON THE STATE OF CAREERS ADVICE FOR THE VOLUNTARY SECTOR IN SCOTLAND

entering the voluntary sector because it doesn't pay them enough. So even though the altruism pay-off can be used to attract entrants of the 'right' type, it could still be that the low pay offered by a career in fundraising is putting off many purists – even people with the same values as charities need to earn a decent living.

9.2 Poor public perception/understanding of a career in fundraising

Another important barrier to entry to fundraising, and thus on to a qualifying pathway, is the poor public perception of the voluntary sector generally (Hurrell et al 2011), and fundraising specifically (Institute of Fundraising 2019, p8). Many Scottish graduates, for example, had little idea that people were paid to work for charities and thought it was all voluntary work done out of the 'goodness of your heart', views that were particularly expressed by people with no direct experience (such as by volunteering) of the voluntary sector, (Hurrell et al 2011, p345).

The question is why do potential entrants to the voluntary sector workforce have such a poor perception of it and what the sector is doing to redress it.

9.3 Lack of promotion of/careers advice about a career in fundraising

School leavers also hold similar uniformed attitudes to the voluntary sector as do

undergraduates (Hurrell et al 2011, p341), which suggests that at both the point of leaving school and on leaving university people who could be attracted to the voluntary sector workforce are not being given appropriate and relevant information about voluntary sector careers. For example, when charities take stands at graduate job fairs and milk rounds, they are often there to promote volunteering rather than recruit staff (ibid, p346).

Interviews with employers and recruiters in the Scottish voluntary sector attributed the poor perception of the sector by potential entrants to its workforce to “poor communication and information exchange” between charities and universities (this research was about graduate recruitment) and individuals (ibid). But more than this, those misperceptions arose because of a “lack of direction from careers advisors”, but the fault for this lay with the voluntary sector. One respondent said (ibid):

“We stand condemned...We have never really approached the academic world and careers advisors in any meaningful way...We have failed miserably to promote the voluntary sector as a career opportunity...”

Without a careers advisor directing potential new entrants into a qualifying pathway, any such pathway will be underused and will not deliver the numbers of new people fundraising needs to fix the market failure and solve its talent crisis.

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It will therefore be vitally important that relevant bodies – but particularly the Chartered Institute of Fundraising – promote fundraising as a career not just to potential entrants to the workforce, but to the people who will advise them on what careers are available. Promoting careers in higher education fundraising to careers advisors has also been identified as a priority (More Partnerships and Richmond Associates 2014, p13). The IoF believes that gaining chartered status will help to promote fundraising as a career for young people (Abrahams 2019).

This is why it is important that there are entry routes to fundraising that lead to qualifying as a professional practitioner, since careers advisors will need to be able to tell school leavers and graduates precisely how to go about entering the profession and how doing so will equip them with the skills and knowledge they need, and how this will lead to full-time paid employment. Without a qualifying process, careers advisors only have the ad hoc options described in s2 to recommend, which in no way guarantee or even necessarily provide an advantage in the labour market, no matter how much they may be heavily promoted by the IoF.

9.4 General negatives attitudes about the need for fundraisers to qualify

There are likely to be many other barriers to establishing a qualifying pathway to fundraising, such as the time, resources and wherewithal to do it. But potentially the biggest barrier is that many fundraisers do not believe it is necessary, for both practical and normative reasons.

The practical argument runs like this. One argument advanced in favour of NonGraduatesWelcome's agenda was that 'some of the profession's most successful fundraisers don't have degrees'.⁵⁷

By inductive reasoning we arrive at:

- Many successful fundraisers don't have degrees
- Therefore a degree is not necessary for successful fundraising
- Therefore people do not need a degree to enter the fundraising profession or practise as a fundraiser.

By the same reasoning:

- Many successful fundraisers don't have a professional qualification (at least 60 per cent of IoF members do not)
- Therefore a professional qualification is not necessary to become a fundraiser
- Therefore people do not need to study for a professional qualification to practise as a fundraiser.

And:

- No successful fundraiser has passed through a formal qualifying pathway (because there isn't one)
- Therefore a formal qualifying pathway is not necessary to be a successful fundraiser
- Therefore a qualifying pathway is not necessary for entry to the fundraising profession.

Syllogistic reasoning like this is flawed. It could be that had successful fundraisers gone through a qualifying processes or studied fundraising, they would be even more successful than they are now. And it says nothing about unsuccessful fundraisers. Many unsuccessful fundraisers don't have a degree or a professional qualification, and every unsuccessful fundraiser did not go through a qualifying process. So while it may be possible that successful fundraisers who did not qualify can always be found; it may also be that qualifying will reduce the numbers of unskilled and/or less successful fundraisers, close the

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skills gaps, and solve the talent crisis, because these things won't be achieved if we rely on chance or accident to provide requisite numbers of successful (competent) fundraisers.

What we are missing is research that compares the success/professional competence of fundraisers with degrees and/or professional qualifications with the success/professional competence of those fundraisers who don't have these things. This would provide the knockback evidence, whichever way it went, that we currently have to surmise from disparate sources in s4.11.

More than this though, there is a sense that qualifying that involves formal learning of propositional, 'scientific' knowledge is somehow inappropriate from the perspective of the philosophical foundation of the fundraising profession.

Much of the evidence for this is anecdotal and further qualitative research and/or content analysis of the practitioner literature is required to ascertain how prevalent and deep-seated such an attitude is. This paper makes no attempt at a comprehensive exposition of this argument, but there has been enough detail already in this paper to support at least an hypothesis:

- The contempt with which the authors of 'inspirational' how-to books regard 'instructional' how-to books
- The prioritisation of values and attitudes such as passion for the cause, and the concomitant derogation of technical skills, which are seen as "mechanical manipulation" or "slick professionalism"
- The sense that fundraising can be learned on the job without recourse to training or academic education. During the social media traffic following the launch of NonGraduatesWelcome, one fundraiser Tweeted that "everything about fundraising can be learned on the job". And many of the participants to Beth Breeze's study "readily admitted they had no standard practice, did not adhere to accepted techniques, and had never read any book about fundraising or been on a training course" (Breeze 2017, p91). It's hard to avoid inferring that some fundraisers wear their lack of qualification (in the widest sense) as a badge of honour.

And if anyone doubts the anti-professionalist undercurrent in the fundraising 'profession', this is the very first paragraph of an American book that was published last year. The two co-authors hold doctorates and jointly run a consultancy that provides "empirically based

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strategic guidance, essential tools and practical guidance” (Beer and Cain, 2019, p3):

“This book is...an act of reclamation. We aim to take back fundraising from the professionals and the degreed class, with their impenetrable jargon and their fetishized algorithms and extortionate fees and return it to its proper owners: Catholic-school moms, CEOs of smaller nonprofits,⁵⁸ symphony orchestra development officers, idealistic think tankers... the people who are the heart and soul of American civil society.”

The authors further say (ibid, p8) that academic philanthropy education in the USA (singling out the Lilly School of Philanthropy at Indiana University) produces an “earnest cadre of ambitious proto-professionals” and while many of these go on to do “laudable work”, some alumni “inevitably...use the argot of the secret handshake of the philanthropic priesthood learned in school to keep the un-degreed in their place”.

Hwang and Powell’s (2009) study has shown that managerial professionals with their specialist knowledge are better at leading nonprofits, while Betzler and Gmür (2016) have linked increased fundraising professionalisation with increased fundraising capability (see s4.11). Yet the authors of the US book consider the most appropriate people to be raising money for nonprofits to be largely those who are untrained in how to do it and, we can safely assume, fell into their fundraising roles by accident.

Often the idea that no qualifying pathway for fundraising is necessary, particularly one that involves formal education of propositional knowledge (as in a fundraising/marketing/PR degree or an IoF professional qualification), is informed by not valuing professional knowledge; the knowledge exists – in the forms of books, training courses, and the IoF Academy syllabus – but fundraisers, such as some of Beth Breeze’s interviewees, don’t value it enough to access it.

However, sometimes that attitude shifts from not valuing the knowledge that exists to actually valuing not using it; to thinking that it is a good idea to ignore the profession’s cumulative wisdom.

This was demonstrated in 2017 by a fundraiser who had just 18 months experience in the profession, in a blog written to promote a fundraising conference.⁵⁹

“It’s my lack of experience that gives me freedom. This is my first fundraising role and it is a new role within the charity so I feel like I have a lot of freedom mainly because I am making it up as I go. This isn’t intended to sound lax or that I don’t care but it’s been a great benefit to me so far. I haven’t got years of my own or someone else’s experiences swaying my decisions. In every part of our life our past experiences, whether good or bad, dictate our future behaviour and it’s sometimes very hard to change those ways.”

This is what this fundraiser is saying:

- I don’t have experiences of past successes to inform my professional practice that I can copy and adapt to my new role
- I don’t have experiences of past failures that I can learn from and so not repeat in my new role.
- I haven’t listened to anyone else who has succeeded or failed in similar roles.

Yet the fundraiser claims these things have been a ‘benefit’ because they can, quite literally, “make it up as [they] go”.

This fundamentally misunderstands ‘freedom’ in the context of being a member of a profession. ‘Freedom’ in the professions is not based on an absence of knowledge. Freedom is not the freedom to make it up as you go along, unencumbered by anything so frivolous as the knowledge and experience of someone who’s been doing this for 20 years, much less an entire academic syllabus. Freedom in the

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If those recruiting fundraisers put no store in any kind of qualifying process, and so going through the qualifying pathway will not provide any kind of competitive advantage, then there is no incentive for any individual to put themselves through the qualifying process at their own expense.

professions is called “professional autonomy” or “professional authority”, and it is the freedom to exercise the professional’s specialist knowledge and skills to make decisions in the best interest of their client (MacQuillin 2017, p12). To do that, you need to have knowledge and know what you are doing. As in almost every other profession, freedom to do your job in fundraising is grounded in knowing what you are doing, not the exact opposite.

These attitudes combine to form a massive attitudinal barrier that needs to be shifted and overcome, for this reason: if those recruiting fundraisers put no store in any kind of qualifying process, and so going through the qualifying pathway will not provide any kind of competitive advantage, then there is no incentive for any individual to put themselves through the qualifying process at their own expense. Why would they? Why would, for example, someone spend their own money on qualifying as a solicitor if doing so did not help them get a job as a solicitor?

If employers do not or are not permitted to specify that they are looking for applicants who can demonstrate they have particular skills or knowledge through a qualification or having gone through a qualifying pathway – such as a marketing degree or an IoF professional qualification, or points-based structured CPD – then there is no incentive for

anyone to put themselves through such a qualifying pathway.

If we adapt the equation from s8.2, the choices become (ignoring whether they are purists or players):

- People (purists and players) who have acquired appropriate skills/knowledge through the qualifying pathway
- People with some appropriate skills/knowledge
- People without appropriate skills/knowledge.

Faced with this choice, the sector needs to move the dial so that the first of these have a very clear and obvious advantage in the labour market. This will serve to pull people through the entry pathway because there is an incentive at the end of it; and having that incentive will greatly facilitate those whose job – such as careers advisors – is to push them into it.

But if recruiters do not offer this group a competitive advantage in the labour market – so that a qualified fundraiser is no more likely to find a job than a non-qualified fundraiser – then we have a serious problem.

Further, with the distrust in professionalism that is prevalent in the sector, qualified

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fundraisers could actually find themselves at a disadvantage, particularly if when recruiters are faced with the following choice:

- People (purists and/or players) who have acquired appropriate skills/knowledge through the qualifying entry (who are perhaps seen as “purists who were adopting players tactics” [Brown 2005, p5])
- Purists who have not acquired appropriate skills/knowledge through the qualifying entry paths...

...they go for the non-qualified people because their decision is influenced by and conforms to the prevailing orthodoxy in fundraising recruitment that values are more important than knowledge or skills, and that fundraising is an ‘art’ that needs people with “exceptional” inherent qualities rather than a ‘science’ that can be learned. This is an hypothesis that requires further research to verify or falsify.

To close the skills gap, fix the market failure and solve the talent crisis, the fundraising profession needs to start pulling people into a qualifying pathway, from a variety of entry routes, to equip them with the skills and knowledge they need to practice.

That will only happen if employers start specifying that they want to recruit the most qualified people. This is the attitude shift that sector needs: to demand better qualified fundraisers, not less qualified. And so we need further research into employer’s attitudes to various forms of fundraising ‘qualification’ (used in its widest sense), and how much store they put on these various forms of qualification when recruiting staff.

For example, while the HEFCE report recommends a competency-based entry pathway into higher education fundraising, it also says this should not be compulsory (More Partnerships and Richmond Associates 2014, p11), which would mean employers could decide for themselves how much credence to give to any applicant who had gone through the qualifying process and would still be a liberty to recruit non-qualified fundraisers.

Similarly, the IoF’s competency framework currently under development will not be used to accredit an individual as a chartered fundraiser, and it will remain to be seen what kind of advantage acquiring chartered status affords those who have acquired it (and indeed, how many do acquire it).

The talent crisis won’t only be solved only by widening the net; we also have to make sure those the wider net brings into the profession receive suitable education and training to practise successfully and competently in their new profession. In other words, to qualify them as fundraisers.

If we don’t, then we change the meaning of the ‘accidental’ epithet. Fundraising may no longer be a profession that people fall into by accident, but because of the ad hoc and haphazard – and entirely optional – way professional training and education is provided, any level of competence fundraisers achieve they may only achieve by accident.

Instead of accidental fundraisers, we’ll have accidentally-competent fundraisers.

10 Conclusion

It would appear that fundraising is experiencing a 'market failure' in fundraiser recruitment – there are not enough fundraisers with relevant skills and knowledge entering the profession.

But there is currently no set or recommended entry route into fundraising and most fundraisers enter the profession 'accidentally' or come to a gradual decision to become fundraisers, often transferring from other sectors. Only about five per cent of the current fundraising workforce made an intentional decision to embark upon a fundraising career.

Just as there is no recommended entry route into fundraising, neither is there a standard process by which new entrants to the profession can 'qualify' as fundraisers – i.e. to be signed off following a formal process as being sufficiently competent to practise.

Because there is no set or recommended entry route into fundraising that is designed to equip a candidate with the skills and knowledge they need to do the job, recruiters cannot always use this as a criterion in assessing candidates. Entry requirements for fundraising are thus often expressed as behaviours/attitudes of candidates – particularly being authentic and having passion for the cause – rather than what knowledge or skills they have.

To solve this talent crisis in fundraising, we need to design an entry pathway that leads to qualifying as a competent professional. Such a qualifying entry pathway into fundraising would not only ensure the right people were entering the fundraising profession, but that they were being equipped with the right skills and knowledge to practise competently.

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There are currently many components of the unstructured and informal routes to entry to fundraising – such as transferring from other sectors or via field-force fundraising – that could be incorporated into this pathway. There are also many existing ways to gain knowledge – such as the IoF's professional qualifications and CPD – that can be formalised within a new qualifying entry pathway. And new mechanisms, such as the new apprenticeship standard for fundraising, and the IoF's level 3 qualification and competence framework, are soon to come on stream.

In putting together such a qualifying entry pathway, there are plenty of models and concepts developed in other professions from which the fundraising profession can draw, so there is no need to reinvent the wheel.

However, a possible barrier to establishing such a pathway appears to be a somewhat prevalent attitude within the profession that it is neither needed nor desirable.

For a qualifying entry pathway to become accepted, there needs to be an attitudinal shift among fundraising recruiters towards valuing qualification through entry pathways, a shift that will prioritise knowledge and skills acquired through those pathways more than the values (such as passion for the cause) of the candidate professional.

And so the fundraising profession needs to work together to achieve consensus on what type of pathway is needed and what benefits this would bring.

Relying on new generations of fundraisers to fall into the profession by accident, or to gradually come to a decision to become fundraisers after careers in the private or public sectors, is potentially failing to bring in the right people with the right talents. Building a qualifying entry route into fundraising is a way – and possibly the best way – to ensure that people who want to choose fundraising as their first choice career have the best chance of succeeding in their career aspirations.

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10.1 Future research questions

Entry routes into fundraising (s2)

Three broad types of entry route to fundraising have been identified: accidental, gradual and intentional. Further conceptualising these routes, describing their components (i.e. what constitutes the “related professional and volunteering roles” that gradual entrants to the profession come from), and understanding the decision-making of each could be fruitful future research. This is particularly true of the accidental route. For such an important entry route for about 45 per cent of the profession, the accidental pathway is poorly researched or understood: there is little knowledge about how this ‘accident’ happens (s2).

1. Further research on the backgrounds and former careers of gradual and accidental fundraisers who transfer from other sectors is needed, as is which of their transferable skills are considered most relevant to their success in transferring (s2.1).
2. For those fundraisers who intentionally choose to become fundraisers and try for direct entry to the profession as their first job (s2.2):
 - How many jobs do direct entry candidates apply for before they are successful?
 - How likely are they to be successful – how many potential direct entry candidates never get a job in fundraising?
 - What are the reasons for rejecting direct entry fundraisers (probably their lack of skills and/or experience)?
 - What advice are they given on acquiring the skills and experience to get jobs?
 - How many potential applicants for early career fundraising jobs choose not to even apply, and for what reasons?

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3. For fundraising apprenticeships that have been used prior to the new apprenticeship standard currently being developed by the trailblazer group and due to become available in 2020 (s2.2.1):
 - What has been the scope and scale of such fundraising apprenticeships?
 - Under what standards they have they been offered ?
 - How useful is the knowledge acquired in apprenticeships?
 - How successful are apprentices at going on to full-time regular employment.?
4. For internships and volunteering (s2.3):
 - How often do internships lead to professional roles in fundraising and what is the wastage (i.e. how many interns never achieve a fundraising career)?
 - The quality of internships – are they structured towards needs of the intern (their future employment) by providing opportunities to acquire knowledge and skills that are later usable – or are they merely a way of gaining cheap labour?
 - Do interns actually acquire knowledge and skills that are later usable?
 - How many charities offer paid internships and how many voluntary internships?
 - What funding is available to support internships?
5. For university rag fundraising (2.4):
 - What are the motives for students to get involved in rag, and particularly whether they do so with a view to a career in fundraising (see also s8.2 on ‘purists’ and ‘players’)
 - How successful are rag fundraisers in the labour market and what proportion of the current workforce has entered via this route?

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- Do employers take rag experience into consideration?
 - Have the skills and experience gained during rag fundraising proved transferable and usable in their professional careers?
6. For face-to-face and other field-force fundraising:
- What proportion of the current workforce is entering via these routes?
7. There is no set or recommended entry route to fundraising but there is myriad advice on how to gain the skills and experience needed to get a first fundraising job (s2.6). This advice rarely contains recommendations to gain a professional qualification or take a course. Is this because:
- The authors are not aware of what's available?
 - They don't think they will provide relevant skills or knowledge?
 - They don't think it's worth recommending them as they will not provide an advantage in the job market (the same way that volunteering or having a degree are perceived to give an advantage)?

Qualifying as a fundraiser (s4)

8. What will be the role and purpose of the National Occupational Standards for Fundraising in any future qualifying pathway?
9. There is a dearth of research that compares the success/professional competence of fundraisers with degrees and/or professional qualifications with the success/professional competence of those of fundraisers who don't have these things (s4.11, s9.4).

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A qualifying pathway for fundraising (s7)

10. Work is urgently required on obtaining consensus about the type of qualifying pathway to put in place so that, in the medium term, there is a strategic vision for a variety of entry routes (s7.2).

What type of applicants should we aim to attract into the qualifying pathway? (s8)

11. Previous research has shown that graduates adopt two ideal types when applying for jobs – players and purists. If this happens in fundraising it would have many implications for the entry processes that the profession puts in place. Further research on the tactics used by people to get jobs in fundraising could therefore be valuable. (s8.2).
12. And do recruiters prefer to recruit purists with the right values/inherent abilities ahead of others who might have more skills, because they believe fundraising cannot be taught or learned (s9.4)?
13. In deciding whether there should be a graduate entry programme for fundraising, research on auditing the skills of all fundraising roles is needed to ascertain precisely which graduate skills (if any) are needed for which roles (s8.3).

Barriers to establishing a qualifying pathway (s9)

14. There appears to be a prevalent attitude within the fundraising profession that an entry/qualifying pathway is not desirable. Qualitative research and/or content analysis of the practitioner literature is required to ascertain how prevalent and deep-seated such an attitude is (s9.4).

Appendix

Sources of blogs used to construct Table 2.1:

All About Careers

<https://www.allaboutcareers.com/careers/career-path/fundraising>

Andy King Raising

<https://andykingraising.wordpress.com/2019/04/02/graduate-guide-to-entering-fundraising/>

Career Trend

<https://careertrend.com/how-6397986-become-professional-fundraiser.html>

CharityJob

<https://www.charityjob.co.uk/careeradvice/how-to-get-into-a-fundraising-career/>

Guardian

<https://www.theguardian.com/voluntary-sector-network/2015/oct/08/how-to-become-a-charity-fundraiser-six-top-tips>

National Careers Service

<https://nationalcareers.service.gov.uk/job-profiles/charity-fundraiser>

ProspectUs

<https://www.prospects.ac.uk/job-profiles/charity-fundraiser>

Talent Market

<https://talentmarket.org/candidates/considering-a-career-in-fundraising/>

TPP

<https://www.tpp.co.uk/jobseeker/career-advice/change-of-career/getting-into-fundraising>

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Footnotes

- ¹ 'Qualified' is in scare quotes because, as we shall see, there are no mandatory qualifying processes for fundraisers and few fundraisers put themselves through the voluntary qualifying routes.
- ² E.g. <https://www.ahp.org/test-pages/40-over-40/jason-a.-huff>
<http://www.thejournal.co.uk/business/business-news/lisa-finds-new-sense-purpose-4603551>
<https://differentstrokes.co.uk/wp-content/uploads/2017/07/Newsletter45.pdf>
- all accessed 13 January 2020
- ³ The full list of such standards can be seen here - <https://www.instituteforapprenticeships.org/apprenticeship-standards/?>
- accessed 13 January 2020
- ⁴ <https://www.gov.uk/guidance/search-for-apprenticeship-standards>
- accessed 13 January 2020.
- ⁵ <https://www.instituteforapprenticeships.org/apprenticeship-standards/fundraiser/>
- accessed 13 January 2020.
- ⁶ Conversation with Becky Phillips, co-lead of the Trailblazer Group, 2 June 2020.
- ⁷ Communication from Michelle Wright, Cause4, 15 May 2020.
- ⁸ <https://www.bond.org.uk/jobs/apprenticeships>
- accessed 13 January 2020.
- ⁹ <https://www.instituteforapprenticeships.org/apprenticeship-standards/business-administrator/> - accessed 13 January 2020.
- ¹⁰ <https://www.charity-works.co.uk/apply/>
- accessed 15 June 2020
- ¹¹ Unless otherwise stated, all information on the Charity Works graduate entry scheme comes from this video - <https://www.charity-works.co.uk/graduate-programme/>
- accessed 13 January 2020.
- ¹² <https://www.case.org/talent-management/case-europe-graduate-trainee-scheme>
- accessed 13 January 2020.
- ¹³ <https://artsfundraising.org.uk/fellowships>
- accessed 13 January 2020.
- ¹⁴ <https://www.nasfa.org.uk>
- accessed 2 January 2020.
- ¹⁵ 'Apprenticeship' is here in scare quotes since it is not a formal apprenticeship according to a government approved standard.
- ¹⁶ <https://www.cim.co.uk/qualifications/>
- accessed 3 January 2020.
- ¹⁷ At the time of writing - July 2020 - the IoF's new guides on fundraiser recruitment (IoF 2020a, 2020b, 2020c, 2020d) are available on the equality, diversity and inclusion section of the IoF website, but there is no link to them from the careers/professional development pages, at least not yet.
- ¹⁸ <https://www.institute-of-fundraising.org.uk/groups/national-scotland/have-you-considered-fundraising-as-a-career/>
- accessed 3 January 2020.
- ¹⁹ It should be noted that the lists of skills in these blogs is not confined to such personal qualities: TPP's blog, for example, lists research, database and IT, organisational, account handling, and people management as desirable skills, among others.

- ²⁰ This is a critique of the language used to describe and present them, not necessarily a criticism of the importance of the trait of being passionate to successful fundraising, which is not contingent on the words people use to talk about it.
- ²¹ The US figure is higher because Nathan's list includes every type of methods by which a fundraiser has learned, whereas Breeze asked only for the main method. Breeze's percentages therefore sum to 100, whereas Nathan's don't.
- ²² <https://cpduk.co.uk/explained>
- accessed 15 January 2020.
- ²³ <https://www.institute-of-fundraising.org.uk/events-and-training/cpd/>
- accessed 15 January 2020.
- ²⁴ <https://www.institute-of-fundraising.org.uk/events-and-training/cpd/about-cpd/>
- accessed 15 January 2020.
- ²⁵ <https://ahc.leeds.ac.uk/courses/201819/g739/arts-fundraising-and-philanthropy-pgcert>
- accessed 2 June 2020
- ²⁶ <https://www.institute-of-fundraising.org.uk/events-and-training/qualifications/> - accessed 15 January 2020.
- ²⁷ <https://efa-net.eu/efa-certification>
- accessed 12 August 2020.
- ²⁸ https://efa-net.eu/wp-content/uploads/2018/10/EFA_Certification_Competency_Framework.pdf
- accessed 12 August 2020.
- ²⁹ <https://www.ukstandards.org.uk>
- accessed 15 January 2020.
- ³⁰ <https://www.gov.uk/government/publications/national-occupational-standards>
- accessed 15 January 2020.
- ³¹ http://skills-thirdsector.org.uk/national_occupational_standards/fnos/
- accessed 15 January 2020.
- ³² <https://www.institute-of-fundraising.org.uk/events-and-training/introduction-to-fundraising/>
- accessed 15 January 2020.
- ³³ Communication from Cause4 ceo Michelle Wright, 12 June 2020.
- ³⁴ <https://www.cfre.org/about/certification/>
- accessed 16 January 2020.
- ³⁵ https://www.cfre.org/?s=a0CU000000Givk7MAB&post_type=members&meta_key=_country
- accessed 16 January 2020.
- ³⁶ <https://www.cfre.org/certification/initial-requirements/> - accessed 16 January 2020.
- ³⁷ <https://www.chi.ac.uk/university-chichester-conservatoire/our-courses/ba-hons-charity-development> - accessed 15 January 2020.
- ³⁸ https://www.cass.city.ac.uk/__data/assets/pdf_file/0004/78637/2020-21Charity_Marketing_and_Fundraising_Overview.pdf
- accessed 15 January 2020.
- ³⁹ <https://www.kent.ac.uk/courses/postgraduate/769/philanthropic-studies>
- accessed 15 January 2020.
- ⁴⁰ <https://www.open.edu/openlearn/money-business/winning-resources-and-support>
- accessed 15 January 2020.
- ⁴¹ <https://publications.parliament.uk/pa/cm200708/cmselect/cmdius/187/187we10.htm>
- accessed 15 January 2020.
- ⁴² Personal communication from CFRE ceo Eva Aldrich, 11 December 2019.
- ⁴³ The author of this paper holds a fundraising qualification - the IoF's Diploma in Fundraising - but would not consider himself a 'qualified' fundraiser.
- ⁴⁴ i.e. 20 in Roman numerals.

- ⁴⁵ https://en.wikipedia.org/wiki/Bloom%27s_taxonomy_and/or_https://cft.vanderbilt.edu/guides-sub-pages/blooms-taxonomy/
- ⁴⁶ For avoidance of doubt, this is not a criticism of the CFRE's five-yearly job analysis; it is merely recording the criticisms that have been made in general about deductive processes of identifying job task, and so says nothing about how CFRE tackles their analysis.
- ⁴⁷ <https://www.institute-of-fundraising.org.uk/blog/becoming-the-chartered-institute-of-fundraising--a-message-from/> - accessed 14 February 2020.
- ⁴⁸ Put "is fundraising an art of science" into Google to see the search results.
- ⁴⁹ This is but one example, at the level of a Master's degree - <https://www.uwl.ac.uk/academic-schools/nursing-midwifery/continuing-professional-development/cpd-courses/cpds/patient-engagement-negotiated-workbased-learning> - which draws on "major theories" of patient involvement - accessed 17 January 2020.
- ⁵⁰ The IoF advises people seeking a job in fundraising to do just this: "You will need to find out about the organisation. What is their mission and their values? What can you find out about their recent work? What do others say about them on social media? (IoF 2020d, p10.)
- ⁵¹ Recall that the graduates competing for places on Charity Works' scheme had to attend an assessment centre (s2.2.1).
- ⁵² Using the Princes' Trust as a case study, the Chartered Institute of Fundraising also flies a flag for values-based hiring - which is about "looking beyond the technical skills and experience listed in someone's CV" and "shifting the focus away from CVs, experience and academic credentials" (IoF 2020d, p24).
- ⁵³ <https://www.merriam-webster.com/dictionary/slick> - accessed 9 January 2020.
- ⁵⁴ <http://bit.ly/slick-salesman> - accessed 9 January 2020.
- ⁵⁵ <https://www.goodreads.com/quotes/128348-sincerity---if-you-can-fake-that-you-ve-got-it>
- ⁵⁶ All information relating to NGW in this section is taken from their website and is not referenced individually - <http://nongraduateswelcome.co.uk> - accessed 17 January 2020.
- ⁵⁷ It should be noted though that this was never an argument advanced formally by NGW, just made in connection to their position.
- ⁵⁸ Not the bigger ones, you'll notice.
- ⁵⁹ The author of this paper considers it most appropriate to quote this person anonymously.

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