



HANDBOOK FOR TRAINERS AND EDUCATORS





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1. INTRODUCTION

This Trainer Handbook for the Foundations Fundraiser and Storyteller (FIRST) Project provides trainers with a short but comprehensive guidance on the four learning modules "Basics of Fundraising in a European Context," "Communication and Storytelling in European Fundraising," "European Projects as Fundraising Sources," and "Building Your European Network." It equips trainers with the knowledge and tools needed to effectively implement the FIRST curriculum in an adult education or VET context, covering the overall objectives of the project itself and of the learning contents specifically. The handbook provides explanations of the key concepts, learning outcomes, possibilities for assessment and adaptation, and further resources. The handbook thus is an integral part of ensuring the sustainability of the FIRST results.

THE FIRST PROJECT: GOALS, CONTEXT, AND DESIRED IMPACT

The importance of the third sector in Europe is increasingly recognized from different perspectives. It holds economic significance in terms of employment and production, particularly in-service provision. Public authorities have started acknowledging third sector organizations as partners for implementing public policies. However, this recognition often appears to be instrumental or limited to specific fields, and the public's perception of the third sector remains unclear. Even within the sector itself, organizations vary in their awareness of belonging to a distinct and broad sector, which is often low. European fundraising plays a crucial role in supporting the third sector and its initiatives. It helps ensure the sustainability and growth of organizations working towards common values, civic engagement, and participation. By raising funds, European organizations can expand their programs, reach more individuals, and make a greater impact in their respective fields. Fundraising efforts contribute to the economic significance of the third sector by providing employment opportunities and facilitating the provision of vital services. Additionally, effective fundraising strategies can enhance the visibility and public perception of the third sector, fostering greater understanding and support from the European population.

In this context, the FIRST project aims to enhance the role of foundations in promoting common values, civic engagement, and participation by boosting their fundraising and storytelling skills to achieve their objectives. With the online course, FIRST provides training and resources to help organizations develop effective fundraising strategies on a European level. By equipping organizations with the necessary skills and knowledge, FIRST empowers them to maximize their fundraising potential. FIRST also facilitates networking and collaboration among organizations within the third sector by connecting like-minded organizations and individuals through an interactive online networking tool. That way, FIRST creates opportunities for knowledge sharing, best practice exchange, and collaboration on joint fundraising initiatives. This fosters a supportive and interconnected fundraising community. This competence framework provides a structured and comprehensive guide for identifying and understanding the competences and skills the FIRST partnership deems elementary for carrying successful fundraising and storytelling on a European level.

BENEFITS OF THE FIRST PROJECT FOR ADULT AND VOCATIONAL EDUCATION AND TRAINING

The project Foundations' Fundraiser and Storyteller offers a multitude of benefits for both individuals and society as a whole through Adult and Vocational Education and Training. Its training approach This initiative enhances skills for fundraising on a European level with and through storytelling which can lead to individuals' career advancement and social impact on several levels.

1. Skill Enhancement:

- **Skills Development:** The project provides opportunities for adults to acquire new skills and knowledge, including fundraising opportunities, communication strategies, and networking skills.
- **Tailored Learning:** The FIRST course is a customized and practical training for Adult education and VET providing trainees with relevant skills that can be applied immediately in their work.
- **Lifelong Learning:** The project promotes the concept of lifelong learning, encouraging individuals to continuously upgrade their skills, stay current with trends in their sector, and adapt to changing job requirements.

2. Career Advancement:

- **Professional Growth:** Through access to quality Adult Education and VET programs through programs like FIRST, individuals can significantly improve their career prospects. They become better equipped to take on higher-level roles and responsibilities within their fields.
- **Higher Earning Potential:** Enhanced skills and qualifications often lead to higher earning potential. This not only benefits the individuals themselves but also contributes to economic growth and reduces income inequality.
- **Job Security:** As individuals gain new skills and become more adaptable in their careers, they are better positioned to weather economic uncertainties and job market fluctuations.

3. Social Impact:

- **Reduced Unemployment:** Continuous learning opportunities help reduce unemployment rates by equipping individuals with the skills demanded by the job market, thereby decreasing reliance on unemployment benefits and social assistance.

- **Increased Productivity:** A skilled workforce is more productive, benefiting businesses and the economy at large. This increased productivity contributes to economic growth and stability.
- **Empowerment and Inclusion:** The project promotes social inclusion by providing free educational opportunities to marginalized and underserved groups, thereby empowering individuals from all backgrounds to participate fully in society.

4. Fundraising and Storytelling Impact:

- **Enhancing Resource Allocation:** Fundraising and storytelling efforts play a crucial role in directing resources effectively towards European foundation initiatives, ensuring that these programs receive the necessary funding for their sustainability and growth.
- **Promoting Awareness and Advocacy:** Through storytelling, the initiatives gain visibility and encourage advocacy, fostering support for European foundation projects and influencing policy changes.
- **Fostering Collaborative Partnerships:** Fundraising and storytelling activities often involve engaging diverse stakeholders, such as government bodies, corporations, and philanthropic organizations, which can lead to the development of robust partnerships and a more comprehensive approach to addressing the goals of European foundations.

In summary, the Foundations Fundraiser and Storyteller Project not only enriches the lives of individuals by enhancing their skills and career prospects but also has the potential for a positive impact on society. It supports economic growth, reduces inequality, and promotes social inclusion and empowerment, all while raising awareness and resources to ensure the sustainability of European foundations and their projects.

2. PURPOSE OF THE TRAINER HANDBOOK

This Trainer Handbook for the Foundations Fundraiser and Storyteller (FIRST) Project provides trainers with a short but comprehensive guidance on the four learning modules "Basics of Fundraising in a European Context," "Communication and Storytelling in European Fundraising," "European Projects as Fundraising Sources," and "Building Your European Network." It equips trainers with the knowledge and tools needed to effectively implement the FIRST curriculum in an adult education or VET context, covering the overall objectives of the project itself and of the learning contents specifically. The handbook provides explanations of the key concepts, learning outcomes, possibilities for assessment and adaptation, and further resources. The handbook thus is an integral part of ensuring the sustainability of the FIRST results.

Primarily, the FIRST course was developed as a self-learning experience for individuals who are already working for foundations and/or in fundraising. However, we also see the potential of the course being implemented as a face-to-face or blended learning activity. This has several advantages for both learners and trainers, such as a more structured learning environment, better accountability, easier access to resources and peer interactions, as well as feedback and more direct assessments. This can result in higher motivation and commitment from the learners. Additionally, a structured course provides clearer goals and planning, while still allowing for a certain flexibility—especially if the course is implemented in a blended way with both online and offline components.

A trainer-led version of the FIRST course thus can provide a framework and support system that enhances the effectiveness and efficiency of self-directed learning, as it can combine aspects of self-paced learning with the structure and accountability found in more traditional educational settings, ultimately helping individuals achieve their learning goals more successfully.

To ensure accessibility and inclusivity when teaching the FIRST course in adult or vocational education and training, consider the following points:

1. **Universal Design:** Consider adapting the materials with universal design principles to create tailored content and learning materials that are accessible to all, including individuals with disabilities.
2. **Alternative Formats:** Provide content in multiple formats (text, audio, video) to accommodate different learning styles and accessibility needs.
3. **Supportive Environment:** Foster an inclusive classroom culture where learners feel comfortable asking questions and seeking assistance.
4. **Diverse Perspectives:** Include diverse voices and perspectives in course materials to reflect the backgrounds and experiences of all learners.
5. **Feedback Mechanism:** Establish a feedback mechanism for learners to report accessibility issues and promptly address any concerns.

The handbook will provide you with the roadmap for a course, including suggestions for training activities for each of the units. You will find a description of each module, including the objectives, key concepts, envisioned learning activities, and assessment criteria. You will also have a list of necessary materials for each of the activities and a timeframe, so you can plan your course accordingly. We would like to point out that the materials and the entire course are an OER licensed under a CC 4.0, which means that you are free to adjust and adapt them as you see fit. The concrete implementation with an adaptation to the concrete circumstances is of course possible and desired. As mentioned at the beginning, this course can also be implemented as a blended learning, in which the participants carry out certain, theoretical parts of the course as a



self-learning offer at home, and the face-to-face activities concentrating on repeating, deepening and applying.

3. TRAINING METHODOLOGY

For the development of the FIRST training course, we followed the principles of the Andragogy theory, developed by Malcolm Shepherd Knowles 1913 – 1997.

Andragogy theory makes the following assumptions about adult learning:

- 1) Adults need to know *why* they need to learn something.
- 2) Adults need to learn *experientially*.
- 3) Adults approach learning as *problem-solving*.
- 4) Adults learn best when the topic is of *immediate value*.

In short, andragogy means that instruction for adults needs to focus more on the process and less on the content being taught. Strategies such as case studies, role-playing, simulations, and self-evaluation are most useful. Instructors adopt the role of facilitator or resource rather than lecturer or grader.

Following the aforementioned approach, this guide provides practical activities for learners who are either new to fundraising or who want to improve their fundraising skills on a European level. As the course includes many transversal competences, such as planning and communication skills, the course may be also interesting for other training purposes and target groups, such as re-integrating NEETs or re-skilling adult job seekers or volunteers.

4. THE FIRST COMPETENCE FRAMEWORK AND THE 4 LEARNING MODULES

For the selection of competences, we consulted a variety of European competence frameworks, such as EntreComp, DigComp, and the EFA Competence Framework. From these, we then selected the potentially relevant competences and conducted a needs analysis with European foundations, asking them which competences and skills would be most relevant for them in the context of fundraising and storytelling. Here, the following competences were named as particularly important for a training: communication skills, creativity, content storytelling, visual storytelling, cross-media storytelling, convincing abilities, and networking. For the detailed results, please see the [research paper compiled by i-strategies and the Competence Framework](#). The FIRST partnership then started to create a training program tailored towards the development of these specific competences. The result is the online training course with four modules available via the platform network-first.eu. Below, we line out the modules, their respective objectives, key concepts, the learning activities, and the assessment criteria.

Please note that the given time frames are only estimates and depend largely on the teaching style, the learning groups, and the setting.

The following modules make up the FIRST Training course:

Module 1: Basics of Fundraising in a European Context

Key Competences: COMMUNICATION SKILLS, CREATIVITY, CONVINCING ABILITIES, NETWORKING, PLANNING SKILLS

Module 2: Communication and Storytelling in European Fundraising

Key Competences: CREATIVITY, CONTENT STORYTELLING, VISUAL STORYTELLING, CROSS-MEDIA STORYTELLING

Module 3: European Projects as Fundraising Sources

Key Competences: COMMUNICATION SKILLS, CREATIVITY, CONVINCING ABILITIES, NETWORKING, PLANNING SKILLS

Module 4: Building Your European Network

Key Competences: NETWORKING, COMMUNICATION SKILLS, CONVINCING ABILITIES



Module 1: Basics of Fundraising in a European Context

Objectives: The objectives of the module are: to understand the concept of fundraising and its importance in a European context; to explore various fundraising methods and strategies; to assess and increase competencies for international activities and adapt procedures, communication, and goals to a European context; to understand the role of foundations in the EU context and the benefits of joining the European Foundation Association (EFA); and to learn how to develop strategic planning for fundraising activities and funding programs within the EU using SWOT analysis.

Key Concepts: The key concepts the module covers are: fundraising, European Union, sources of funding, strategy development, funding programs, SWOT analysis.

Learning Activities: The purpose of the learning activities in this module is to provide participants with a deeper comprehensive understanding of different topics of the module. The activities aim to enhance knowledge, skills, and competencies related to fundraising methods, European strategies, sources of funding, and developing a vision and strategy for a European context. The main focus of these activities are critical thinking, deep comprehension and active discussion between participants and because of that participants learn in a more meaningful way.

Assessment Criteria: The assessment criteria of the learning activities are not a grade-based one, so in order to measure the successful learning of the module contents the trainer has to focus more in the process of the learning activity: if they actively participate, discuss between them, ask the trainer questions, have more doubts or interest in the topic during the activity, and the skills they are demonstrating or acquiring during the process.

Time Frame: 2 hours

Module 1, Unit 1: Introduction to fundraising

Activity: “Associations vs. Foundations Showdown”

| Activity Steps | Materials | Time Required |
|--|--|---------------|
| <p>Step 1: Introduction</p> <p>Briefly highlight the importance of understanding the differences between them.</p> | <ul style="list-style-type: none"> • Slide presentation | 2 min |
| <p>Step 2: Brainstorm and research</p> <p>Divide participants into small groups and provide each group with a flipchart paper and markers. Ask them to list as many differences as they can between associations and foundations, and also find at least 3 real-life examples of each. Encourage creative thinking and collaboration within the groups.</p> | <ul style="list-style-type: none"> • Flipchart/ whiteboard • Markers • Laptop, smartphone or any device with access to the Internet | 15 min |
| <p>Step 3: Group presentation</p> <p>Each group presents their findings to the whole group. Facilitate a discussion after each presentation to clarify any misconceptions or provide additional insights.</p> | <ul style="list-style-type: none"> • Flipchart/ whiteboard • Markers | 10 min |

Module 1, Unit 2: Assessing your foundation in an EU context: Is your organisation ready for Europe?

Activity 2: “Questions for your market analysis: Is your foundation ready?”

| Activity Steps | Materials | Time Required |
|--|--|---------------|
| <p>Step 1: Introduction</p> <p>Briefly explain the importance of market analysis for foundations operating in a specific context. Show the example of the Foqus experienced recently shown to the participants.</p> | <ul style="list-style-type: none"> Slide presentation of the Foqus experience | 2 minutes |
| <p>Step 2: Brainstorm</p> <p>Give participants a paper with a pen or pencil to note down their ideas. Ask them to think about the local and the European context and come up with questions that would help assess the market potential. Encourage them to consider factors such as target group, competition, funding opportunities...</p> | <ul style="list-style-type: none"> Paper Pens or pencils | 10 minutes |
| <p>Step 3: Group discussion</p> <p>Create a group discussion where participants share their questions and ideas. Encourage collaboration and feedback among participants.</p> | <ul style="list-style-type: none"> Flipchart/ whiteboard Markers | 10 minutes |

Module 1, Unit 3: Adapting procedures, communication, and goals to a European context

Activity: “Find the European funding program you can apply to”

| Activity Steps | Materials | Time Required |
|--|---|---------------|
| <p>Step 1: Introduction</p> <p>Briefly explain the significance of funding programmes for foundations in the EU. Handout the list of funding programmes available within the EU.</p> | <ul style="list-style-type: none"> List of the funding programmes within the EU | 5 minutes |
| <p>Step 2: Research</p> <p>Participants look into more detailed information on each programme (requirements and more) trying to find which one they could apply to. At the same time, they think about the partnerships they could create, finding out which other countries they could collaborate with.</p> | <ul style="list-style-type: none"> Laptop, smartphone or any device with access to the Internet | 15 minutes |
| <p>Step 3: Sharing and reflection</p> <p>Each participant presents their analysis findings to the group. Encourage participants to reflect on the similarities and differences between various funding programmes.</p> | <ul style="list-style-type: none"> Microphone (if necessary) Flipchart/ whiteboard Markers | 10 minutes |
| <p>Step 4: Conclusion</p> <p>Encourage participants to act based on their findings, such as considering application submissions or seeking further assistance.</p> | <ul style="list-style-type: none"> | 5 minutes |

Module 1, Unit 4: Developing a European strategy for your foundation

Activity: “SWOT Analysis for your foundation strategy”

| Activity Steps | Materials | Time Required |
|---|--|---------------|
| <p>Step 1: Introduction</p> <p>Briefly explain the purpose and importance of conducting a SWOT analysis for foundation strategy assessment.</p> | <ul style="list-style-type: none"> • Presentation slide of the SWOT analysis • Flipchart/ whiteboard • Markers | 5 minutes |
| <p>Step 2: SWOT analysis</p> <p>Provide the participants with a SWOT template and have them brainstorm and list the internal strengths and weaknesses, and the external opportunities and threats of their foundation strategy. Create a discussion to explore and evaluate the identified elements.</p> | <ul style="list-style-type: none"> • SWOT template • Pens or pencils • Flipchart/ whiteboard • Markers | 10 minutes |
| <p>Step 3: Business Plan as an internal analysis tool</p> <p>Give the participants the handout of a business ‘plan parts. Discuss with them all the parts and how each of them is important and how to use them as an internal analysis tool.</p> | <ul style="list-style-type: none"> • Handout of a business ‘plan parts • Flipchart/ whiteboard • Markers | 5 minutes |
| <p>Step 4: Analysis and conclusion (30 minutes)</p> <p>Create a group discussion where participants analyse the relationships between all the factors. Encourage participants to identify strategic insights and possible actions based on these relationships. Discuss potential next steps for incorporating the insights gained into the foundation’s strategy.</p> | <ul style="list-style-type: none"> • Flipchart/ whiteboard • Markers | 10 minutes |

Module 2: Communication and Storytelling in European Fundraising

Objectives: The objectives of the module are to provide basic knowledge about storytelling, to highlight the importance of this activity for foundations and to provide some useful tools for implementing storytelling for fundraising.

Key Concepts: storytelling, European-level Fundraising, communicating a cause

Learning Activities:

- Learning Activity 1: This activity aims to improve the learner's ability to create stories. Starting from a picture the learners invent a story on the spur of the moment, trying to follow the suggestions in module 2 Topic 1 (pp. 4-5).
- Learning Activity 2: This activity helps learners to determine their organizations' European dimension with the help of guiding questions (Template 1 in the Annex).
- Learning Activity 3: The learners train divergent thinking with the help of creativity exercises.
- Learning Activity 4: The learners design a storytelling strategy for a fund-raising project in a coherent and organised way, using the Storytelling Canva (Module 2, Topic 4, pp. 10-11).

Assessment Criteria: The module includes an assessment with 10 multiple-choice questions covering all module topics.

Time Frame: 4 hours

Module 2, Unit 1: Basics of Storytelling

Activity 1: “Making up a story”

| Activity Steps | Materials | Time Required |
|---|---|-------------------|
| <p>Step 1: Have learners pick an image, e.g. from a newspaper or from an online gallery. Ideally, these pictures do not give immediate context but are weird or interesting so people can build a story around it. You can also use an AI image generator to create an image with prompts.</p> | <p>Newspaper or other sources for images, such as stock photos or AI</p> <ul style="list-style-type: none"> • https://www.nytimes.com/2022/07/27/learning/145-picture-prompts-to-inspire-student-writing.html • https://pixabay.com/ • https://canva.com/ • https://ideogram.ai/ | <p>10 minutes</p> |
| <p>Step 2: Ask the learners to come up with a short story (3-10 sentences) by following the tips given in the PPT presentation</p> | <ul style="list-style-type: none"> • Pen and paper (or a computer) to write down the story • PPT Module 2, Unit 1 (pp. 4-5) | <p>40 minutes</p> |
| <p>Step 3: Give learners the opportunity to share their story. If they are comfortable with it, the other people in the group can give feedback. Where there any problems while writing the story? Anything they learned from the process?</p> | | <p>10 minutes</p> |

Module 2, Unit 2: Using Storytelling to communicate your cause on a European level

Activity 2: “Determining your (organization's) European dimension”

| Activity Steps | Materials | Time Required |
|--|---|---------------|
| Step 1: Show the slide “Determining your (organization's) European dimension” with the list of bullet points. Go through the points together with the group and make sure everyone understands the different aspects. | <ul style="list-style-type: none">• PPT presentation for Module 2, Unit 2 | 10 minutes |
| Step 2: Allocate a timeframe (15-30 minutes, depending on the group) and ask people to answer the questions for their organization. If working with a large group, this can also be done in pairs or subgroups. | <ul style="list-style-type: none">• It may be helpful to provide Template 1 (Annex) - digitally or on paper - with the prompts. | 15-30 minutes |
| Step 3: Give people the opportunity to present and discuss their findings and any questions that might have come up. What are the most apparent assets or gaps that appear overall? | | 15-30 minutes |

Module 2, Unit 3: Text-based, visual, and cross-media storytelling + useful tools

Activity 3: “Unleashing the Creativity”

| Activity Steps | Materials | Time Required |
|---|--|---------------|
| <p>Step 1: Go to the Discover for Start-ups competence trainer and show the video on Creativity as an introduction. Depending on your group’s language skills, you may also want to select a different language version or find an alternative intro video from another source.</p> | <ul style="list-style-type: none"> https://www.discover-startup.eu/wp-content/uploads/2020/10/creativity_eng.mp4 | 5 minutes |
| <p>Step 2: Depending on your group, select one of the following creativity exercises. Work in pairs or groups if it fits your learners:</p> <ul style="list-style-type: none"> 30 Circles: Use the provided template and or just draw 30 circles on a piece of paper. Set a timer for three minutes and in this time turn as many circles as possible into objects. Quality does not matter! How many uses-Game: Agree on an everyday object (like a paper clip), set a time limit (like 15 Minutes), and try to come up with as many (or 100) ways to use it apart from its actual purpose. | <ul style="list-style-type: none"> https://www.discover-startup.eu/wp-content/uploads/2020/09/4-Creativity-Exercise-30-Circles_revised.pdf Pen and paper | 5-15 minutes |
| <p>Step 3:</p> <ul style="list-style-type: none"> 30 Circles: <p>When the 3 minutes are up, check how many circles people filled in, if there are patterns? Is there story to their objects?</p> <ul style="list-style-type: none"> How many uses-Game: <p>How many uses did people come up with? What are their favourite divergent uses? Is there a story behind the imagined uses?</p> | | 15 minutes |

Module 2, Unit 4: Practical application: Storytelling with Canvas

Activity 4: “Storytelling with Canvas for fundraising”

| Activity Steps | Materials | Time Required |
|--|---|---------------|
| <p>Step 1: Ask learners to select a fundraising project they have already done or intend to do in the future. If they are not yet active in fundraising, they can also imagine a campaign or find an example online. This exercise can also be done in pairs or groups.</p> | | 15 minutes |
| <p>Step 2: Ask the learners to fill in the 9 fields of the storytelling Canva for their fundraising cause.</p> | <ul style="list-style-type: none"> • Canva template • PPT Module 2, Topic 4, pp. 16-17 | 45 minutes |
| <p>Step 3: Have learners draft a fundraising/project communication action. They can choose if they want to use textual, visual or cross-media storytelling.</p> | <ul style="list-style-type: none"> • PPT Module 2, Topic 3, pp. 10-11 • possibly computers, writing and/or video editing software | 60 minutes |
| <p>Step 4: Allocate some time for people to share their (group) work. Discuss whether their approach makes sense, if they had any problems, and if they can imagine using this for an actual campaign.</p> | | 15 minutes |

Module 3: European Projects as Fundraising Sources

Objectives: In the first session, this module provides a basic definition of fundraising, and the principal typologies and methodologies of fundraising. Participants will become familiar with the management of fundraising campaigns techniques. The second session provides an explanation of the European funding programs and their functioning, with a specific focus on how to apply. Participants will be able to identify the most suitable opportunities for foundations. Session 3 consists of a practical guide on learning how European Projects work and how to write an application for funding. Participants will get to know both basic and advanced concepts of Project Management methodologies and learn how to successfully design and deliver EU Project proposals. Session 4 provides useful project management tools and competences.

Key Concepts:

- Digital Fundraising; Crowdfunding; Fundraising Management; EU funding for foundations; Management of European Projects; Project applications; Project Management tools

Learning Activities:


- Creating a Fundraising Strategy with provided template
- Scouting for Calls for proposals: Learners practice using the funding and tender portal and identifying and selecting the most suitable call for proposals.
- Project Concept Note Creation: Learners practice planning and presenting a project idea for internal approval as well as consortium building

Assessment Criteria: Assessment should be based on a combination of the following criteria to gain a complete understanding of learning success additional to self-assessment: active participation in activities, increased skills and knowledge regarding EU Fundings as funding resource and project management, understanding and the ability to apply concepts in practice.

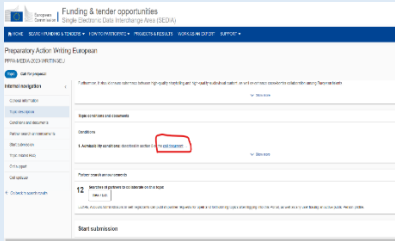
Time Frame: 3 hours

Module 3, Unit 1: Fundraising

Activity 1: "Creating a Fundraising Strategy"

| Activity Steps | Materials | Time Required |
|---|--|---------------|
| <p>Step 1: Open the word template and the instructions link. Learners will collaborate and provide inputs/answers together, following indications reported on the "step by step" guide.</p> | <ul style="list-style-type: none"> • Instructions – Step by Step guide • Template • Slides 7 - 12. | 10 min |
| <p>Step 2: Show the SWAT analysis video, then brainstorm and identify a possible campaign topic/field directly involving the learning group. Follow Step 1 of the online guide, Setting Goals, and ask learners to provide inputs to fill out the first tab on the template. Ask them to set SMART goals: specific, measurable, actionable, realistic, time bound.</p> | <ul style="list-style-type: none"> • SWAT Analysis VIDEO  | 15 min |
| <p>Step 3: focus on the Step 2 of the online guide, outlining a Timeline, and ask learners to provide inputs to fill out the related tab on the template.</p> | <ul style="list-style-type: none"> • Instructions – Step by Step guide | 15 min |
| <p>Step 4: Outlining a Budget.</p> <p>Refer to tab 3 of the Instructions – Step by Step guide and have learners outline a budget for their fundraising campaign and all its associated tasks and calculate the estimated net revenue by phase and in total.</p> | <ul style="list-style-type: none"> • Instructions – Step by Step guide | 15 min |
| <p>Step 5: Finalizing a Calendar Ask learners to fill out a thorough calendar for their fundraising campaign (tab 4 of the instructions), including the key information for each phase.</p> | <ul style="list-style-type: none"> • Instructions – Step by Step guide | 10 min |
| <p>Step 6: Creating a Gift Range Chart or Gift Pyramid.</p> <p>Ask learners to estimate how many major gifts they will need at different levels to reach their campaign's goals.</p> | | 15 min |
| <p>Step 7: Refining Plans & Delegating Tasks.</p> <p>During this final ongoing step, learners keep filling in the blanks and refining their strategies and budget estimates, then delegate specific tasks to their team members.</p> | | 10 min |

Module 3, Unit 2: Finding European Fundraising resources. Activity 2: “Call for proposals scouting”

| Activity Steps | Materials | Time Required |
|---|--|---------------|
| <p>Step 1: One of the most useful tools to look for European funds is the EU Funding & Tenders website.</p> <p>Open the portal online and show it to the class. Then, show the video for beginners.</p> | <ul style="list-style-type: none"> • Funding and tender's portal • Video for beginners • Slide 38 | 10min |
| <p>Step 2: carry out the key word search procedure as shown on the slides, and identify a programme or context always involving the class</p> | <ul style="list-style-type: none"> • Funding and tender's portal (min 19 to min 22) • Slide 39 - 40 | 15min |
| <p>Step 3: Select a specific call and analyse all the main call information:</p> <ul style="list-style-type: none"> • The name of the program from which the call comes; • The call name; • Call Priorities; • The deadline for participation • The budget • The status of the call | <ul style="list-style-type: none"> • Slide 41 | 15min |
| <p>Step 4: Download the call document and show the main information:</p> <ul style="list-style-type: none"> • Introduction • Background • Objectives • Available budget • Timetable and budget • Admissibility and documents • Eligibility • How to submit the application |  | 30 min |

Module 3, Unit 3: Management of European Projects: from incubation to finalization.

Activity 1: “Project Concept Note Creation”

| Activity Steps | Materials | Time Required |
|---|---|---------------|
| <p>Step 1: After having analysed the call for proposal (funding program, budget and timeline, topic, and objectives), involve the class into a practical exercise. Simulate a real project ideation phase. Use the Concept Note Template; gather inputs from the class and fill out each CN session. Namely:</p> <ul style="list-style-type: none"> • Program • Call Sector • Deadline • Project Title • Relevance • Project picture (short description) • Project Objectives • Work Packages (N° of WPs if required by the call) • Project Products • Target Groups • Impact • Budget • Project Partners • Duration | <ul style="list-style-type: none"> • Concept Note Template | 30 min |

Module 4: Building Your European Network

Objectives: This module provides concrete skills for individuals to help them build and/or expand their network using different strategies and methodologies. After this module, individuals will be able to build and expand their EU Network, use other practices as good examples and references, and use online tools such as the FIRST interactive map to expand their network.

Key Concepts: building networking skills and strategies, good practices as examples of EU foundations, and using the interactive networking map developed by the FIRST consortium, effective communication Learning Activities

Learning Activities:

- Activity 1: Communication exercise: Learners participate in an improvisation exercise to develop their communication skills in unexpected situations.
- Activity 2: Analysis of networking cases: Learners analyse successful and unsuccessful networking cases to learn from real-life examples.
- Activity 3: Trend research: Learners research current trends in fundraising and share the information with their peers.
- Activity 4: Spot the best practice: This activity aims to help foundations discover best practices, and further promote and improve their work.
- Activity 5: Cultivate Connections, Building Your Network: The main aim of this activity is to support individuals to build and/or expand their EU network using the online interactive map (tool) created on the FIRST project.

Assessment Criteria: Participants can be assessed on their active participation in activities and their ability to apply the networking skills learned. Another assessment criterion is their ability to analyse networking cases and identify current trends.

Time Frame: 6 hours

Module 4 – Unit 1: Networking Skills and Strategies

Activity 1: “Exercise on effective communication”

This activity aims to develop participants' effective communication skills through an improvisation exercise.

| Activity Steps | Materials | Time Required |
|---|--|---------------|
| Step 1: Instructors explain the importance of effective communication in networking and present the improvisation activity. | <ul style="list-style-type: none"> • Presentation slide about networking skills • Sheets with suggestions for improvisation • Timer | 10 min |
| Step 2: Participants are divided into groups and given handouts with suggestions for their improvisation scenes. Each scene requires them to communicate a specific concept effectively. | <ul style="list-style-type: none"> • Sheets with suggestions for improvisation • Timer | 15min |
| Step 3: The groups perform and receive feedback from the instructors and their peers. | | 30min |

Module 4 – Unit 1: Networking Skills and Strategies

Activity 2: “Analysis of networking cases”

| Activity Steps | Materials | Time Required |
|--|--|---------------|
| Step 1: Instructors present several networking case studies, some successful and some unsuccessful. | <ul style="list-style-type: none"> • Presentation slide about collaboration and cooperation between foundations • Networking case studies • Analysis recording sheets | 5 min |
| Step 2: Participants work in pairs or groups to analyse the assigned case studies, discussing what worked and what did not. | <ul style="list-style-type: none"> • Networking case studies • Analysis recording sheets | 20min |
| Step 3: Each group shares their analysis with the rest of the class, encouraging discussion and feedback. | <ul style="list-style-type: none"> • Analysis recording sheets | 20min |

Module 4 – Unit 1: Networking Skills and Strategies

Activity 3: “Fundraising Trends Research”

| Activity Steps | Materials | Time Required |
|--|---|---------------|
| Step 1: Instructors explain the importance of staying up to date on fundraising trends and provide some online resources. | <ul style="list-style-type: none"> • Presentation slide about trends in Fundraising and in culture | 5 min |
| Step 2: Participants conduct brief research on current trends in fundraising using the Internet. | <ul style="list-style-type: none"> • Internet access • Trend recording sheets | 20min |
| Step 3: Participants share the information and trends they have discovered with the rest of the class, facilitating a discussion on the implications for fundraising. | <ul style="list-style-type: none"> • Trend recording sheets | 30min |

Module 4 – Unit 2: Best Practice examples of EU Foundations

Activity 4: “Spot the best practice”

| Activity Steps | Materials | Time Required |
|--|---|---------------|
| Step 1: Introduction Briefly explain some best practices from foundations, identified by the consortium, and their importance | <ul style="list-style-type: none"> • Slide presentation created by the consortium for this topic | 10 min |
| Step 2: Discovery <ul style="list-style-type: none"> • Split participants into small groups (3-4 persons) • Assign each group with one well established foundation • Each group will have to look for the best practices described in the previous presentation, in their assigned foundations and create a presentation | <ul style="list-style-type: none"> • Computers • Access to the internet • PPTs | 60 min |
| Step 3: Group presentation <ul style="list-style-type: none"> • Each team will be called to present its findings and share them with the other teams. • Discussion to be followed after each presentation. | <ul style="list-style-type: none"> • Computers • Projector | 30min |

Module 4 – Unit 3: How to use the interactive map (PR2) to build your network

Activity 5: “Cultivate Connections: Building Your Network”

| Activity Steps | Materials | Time Required |
|--|---|---------------|
| <p>Step 1: Brainstorming</p> <p>Brainstorming about the use of technology for the networking of foundations. The trainer can use online tools for brainstorming such as Mentimeter.</p> | <ul style="list-style-type: none"> • Computers • Projector • Access to the internet • Smartphones | 15 min |
| <p>Step 2: Brainstorming</p> <p>Brainstorming for the participants if they know what the interactive map is.</p> | <ul style="list-style-type: none"> • Computers • Projector • Access to the internet | 15 min |
| <p>Step 3: Interactive Map</p> <p>The trainer should explain to participants what the interactive map is, and what are the main functionalities of the interactive map developed by the FIRST project.</p> | <ul style="list-style-type: none"> • Computers • Projector • Access to the internet | 30 min |
| <p>Step 4: Interactive Map</p> <ul style="list-style-type: none"> • Split participants into small groups (3-4 persons) • Depending on the number of participants, the trainer will assign to each group to find 3 foundations from different backgrounds. • Some of the different types of foundations are Charity Foundations, Arts Foundations, Community Foundations, Green Foundations, etc. • Each group should find 3 foundations at the EU level for each type of foundation that they will be assigned. • Then, each group should create an account on the interactive map and fill in the form to register them on the map. | <ul style="list-style-type: none"> • Computers • Projector • Access to the internet | 60 min |

5. RESOURCES FOR TRAINERS

Here you can find a number of additional sources we find helpful for conducting a successful training session with the FIRST materials

Module 1: Basics of Fundraising in a European Context

- "[European Foundation Centre](#)" - Official website providing information on European philanthropy and fundraising
- "[European Foundation Association](#)" - Official website offering resources and insights on foundations in Europe
- "[European Funding Guide](#)" - Comprehensive database of funding opportunities within the EU
- "[European Commission - Funding and Tenders](#)" - Official website providing information on EU funding programs
- "[The Institute of Fundraising](#)" - UK-based professional body for fundraisers that offers resources, training, and events relevant to European fundraising

Module 2: Communication and Storytelling in European Fundraising

- "[What really makes a good story?](#)" (Albrighton T.).
- "[The Power of Storytelling in Crowdfunding](#)" (Tadamon)
- "[The art of storytelling for charities](#)" (iRaiser)
- [STORYCOMP](#): Award-winning project on storytelling in adult education

Module 3: European Projects as Fundraising Sources

- [Developing your fundraising strategy](#)
- [Creating a Fundraising Strategy: 12 Steps for Your Nonprofit](#)
- [EU Funding & Tenders website](#):
- Video: [The Funding & Tenders Portal for Beginners](#)
- Presentation: [Complete overview on how to find and apply for funding opportunities by the EACEA](#)
- Handbook: [Writing a successful project](#)
- [Project management tools](#)

Module 4: Building Your European Network

- "[How to be a better fundraiser](#)" – TEDxTalk by Kara Logan Berlin
- "[How to introduce yourself](#)" – TEDxTalk by Kevin Bahler
- "[8 Nonprofit Fundraiser Ideas for 2023!](#)" – Amber Melanie Smith
- Brand Audit (2022): [Brand Audit Turns 5!](#)
- Break Free From Plastic (2023): [About BFFP](#)
- Friends of the Earth Europe (2019): [Long Live School of Sustainability!](#)
- [Zero Waste Cities Map](#) (2021).
- Zero Waste Europe (2022): [Our theory of change](#)

6. ANNEXES

Template 1:

| Question | Situation in your organization |
|---|--------------------------------|
| What is the geographic scope of your organization? In which countries or regions do you already operate and/or have a presence? | |
| Do your mission and goals align with broader European goals and values? | |
| Do your partnerships and networks include connections with European organizations, institutions, or policymakers? | |
| Does your organization already receive support from European donors or institutions? | |
| Does your work contribute to broader European goals and priorities? If yes, how? | |
| What is the geographic scope of your organization? In which countries or regions do you already operate and/or have a presence? | |
| Do your mission and goals align with broader European goals and values? | |
| Do your partnerships and networks include connections with European organizations, institutions, or policymakers? | |



Template 2: Setting Fundraising Goals

| Top Revenue Goal | | Deadline |
|------------------------------------|-----------------------------------|--------------------------------|
| | | |
| Strategic Focus Area | Goal | Notes & Anticipated Challenges |
| Major Gift (60%/80% of total goal) | | |
| Donor Acquisition | % increase over previous campaign | |
| Donor Retention | % increase over previous campaign | |
| Event Engagement | % increase over previous campaign | |



Template 3: "Project Concept Note Creation"

| | |
|--------------------|--|
| Program | |
| Call Sector | |
| Call Link | |
| Deadline | |
| Title | |
| Relevance | |