

# **A Guide for Resource Development Education: Communications, Fundraising, and Leadership**

## **Framework**

The Association of Lutheran Development Executives serves as the leading resource of educational opportunities for its members and others with resource development responsibilities in Lutheran organizations. ALDE also serves as a network for fellow Lutherans working in other areas of not-for-profit management.

At present ALDE transmits the fundamentals of the profession along with information on cutting-edge trends and techniques through three primary educational opportunities: the annual international conference, programming at the chapter level; and by utilizing forms of print media as well as online technology.

The Education Team of ALDE is pleased to present a framework for staff and volunteers engaged in the function of providing educational opportunities to ALDE members. The document reflects a transition from designing programs and sessions in an ad-hoc fashion to a curriculum-based model. The model presented below embraces professional core competencies in a vehicle called the “ALDE Core” while presenting other educational opportunities that acknowledge the professionals’ learning needs based on their job function and years within the field.

This guide does not seek to mandate every annual conference should include a presenter in each of these categories but serves as a frame of reference in judging and selecting individuals who might come closest to fulfilling one of objectives. For chapters, overall programming should seek to cover these categories over the course of three – four years.

## **Keynote Speakers** *(15 – 18 months before conference)*

Each year the ALDE International Conference features two or three individuals who function as plenary or keynote speakers. Due to the nature of the audience and the set-up constraints of the space, the presentation usually takes on the form of an oration—in the past keynote speakers have used audio-visual materials with mixed results.

ALDE keynote speakers should be selected using the following criterion:

- a. *Do they seek to motivate the audience in terms of their own personal or professional growth or through the speaker’s personal motivational story?*
- b. *Do they seek to instruct the audience about broad philanthropic themes or specific functional area?*
- c. *Is the keynote designed to offer an opportunity for conference attendees to grow in their faith and/or spirituality?*

## **Master Classes**

## **The ALDE Core**

There exists a set of core concepts that are essential to the practice of resource development. Many ALDE members are exposed to these courses early in their careers but don't revisit them because historically they have been marked "Introductory."

Each year the following courses may be found in any of the three areas: survey, techniques, or issues and trends. They will be marked with an ALDE core designation with a challenge to members to attempt to revisit these vital curricular areas on at least an every other year basis in order to acquaint and refresh themselves with core principles and the latest takes on consistent themes.

The ALDE core courses are:

- Comprehensive Resource Development Programs
- The Donor Cycle
- Ethical Issues in the Philanthropic Process
- Integration of Communication and Marketing into Resource Development
- Introduction to Planned Giving
- Overview of Solicitation Techniques
- Philanthropy: Past, Present and Future
- Strategic Planning and Assessment for Resource Development
- Fundamentals of Philanthropy, Fundraising and Stewardship
- Technology for Development and Communications

## **Curricular Topics**

The ALDE curriculum is grouped around traditional topic areas. These topic areas are Major Gifts/Planned Gifts, Communications/Marketing, Leadership/Management, Renewable Giving, and Technology.

Courses within these topic areas are further refined into practical areas. These practical areas are: survey (designed for individuals entering the field or those seeking a comprehensive overview of a particular subject), techniques (the how to and heavy concept courses) and issues and trends (programming designed with the senior professional in mind. Within the Association of Lutheran Development Executives, many professionals at this level serve the broader field of philanthropy as independent consultants and may rely on ALDE to help meet their unique educational needs).

## Learning Needs and Teaching Methods

The typical resource development professional moves through three levels of experience and competencies (*years and experience are only estimates*).

<i>Levels</i>	<i>Learning Needs</i>	<i>Teaching Methods</i>
<p><b>Entry Level</b> <i>Resource Development professional (zero to four years of experience)</i></p> <p><b>Survey</b></p> <p>The entry-level professional is new to the field.</p>	<ul style="list-style-type: none"> <li>• High need for introduction to the concepts and vocabulary of resource development and philanthropy</li> <li>• Introduction to philosophy and ethics</li> <li>• Eager for keys to additional resources, mentoring opportunities, publications and the like</li> <li>• Career orientation “how to’s”</li> <li>• Skills in program analysis and assessment</li> <li>• Integration of basic Christian stewardship concepts into professional life</li> <li>• Integration of communications and marketing into resource development plan</li> <li>• Introduction to working in a not-for-profit</li> <li>• Understanding philanthropy in a Lutheran context</li> </ul>	<ul style="list-style-type: none"> <li>• Classroom style seating</li> <li>• Presenter as expert/teacher</li> <li>• Hand outs, references to other informational resources for later review</li> <li>• Opportunities for question and answer period after the session</li> <li>• Opportunity to promote ALDE mentoring program</li> <li>• Information primarily transmitted in lecture-style format</li> </ul>
<p><b>Mid-Level</b> <i>Resource Development professional (five through nine years of experience)</i></p> <p><b>Techniques</b></p> <p>The mid-level professional possesses the basic fundraising knowledge and skills needed to function at a high degree of comfort and competency in his/her role, is moving from skill-based responsibilities to more management-level duties, is beginning to develop a broader philosophical and experiential base from which to apply learning, and is seeking ways to expand management skills.</p>	<ul style="list-style-type: none"> <li>• Advanced skills content &amp; enhancement</li> <li>• Organizational management concepts</li> <li>• Strong not-for-profit management focus</li> <li>• Applied ethics and philosophy of philanthropy</li> <li>• Career development</li> <li>• Leadership training</li> <li>• Using consultants</li> <li>• Assessing/Planning professional advancement</li> </ul>	<ul style="list-style-type: none"> <li>• Classroom style seating</li> <li>• Room design and teaching style modified to induce a more collegial atmosphere</li> <li>• Use of real-life examples</li> <li>• Hand outs</li> <li>• Permission to ask for feedback or clarification during presentation</li> <li>• Presenter to begin with end in mind “how do I equip participants to go out to do this”</li> <li>• Discussion-style format is encouraged</li> </ul>
<p><b>Senior Level</b> <i>Resource Development professional (10 or more years of experience)</i></p> <p><b>Issues and Trends</b></p> <p>The senior-level professional must be a visionary leader possessing advanced technical and management skills and an expanded view of the broader issues and complex systems in management, organizational structure and development, and board development and communication.</p>	<ul style="list-style-type: none"> <li>• Advanced philosophical, ethical, and conceptual leadership</li> <li>• Strong links to profession as an expression of faith</li> <li>• Advanced strategic planning</li> <li>• Topics geared toward the special needs of independent consultants</li> <li>• Non-profit management</li> <li>• Advanced topics related to communications and marketing</li> </ul>	<ul style="list-style-type: none"> <li>• Presenter as facilitator, not lecturer</li> <li>• Broader use of panels and other learning techniques designed to charge the atmosphere with a sense of collaboration</li> <li>• Limited use of handouts</li> <li>• Materials/discussion questions/position papers sent out in advance of presentation</li> <li>• Atmosphere can take on air of a think tank</li> </ul>

