

Unit AJ13 Devise and implement methods to resource a cultural heritage organisation

Elements

AJ13.1 Identify funding objectives and methods for the organisation

AJ13.2 Identify potential contributors to the organisation

AJ13.3 Negotiate and secure funding for the organisation

Unit Commentary

This unit is for archaeologists who have responsibility for implementing the strategies and policies of the organisation; who have responsibility for the development of the organisation or a substantial part of the organisation and who have responsibility within the organisation to allocate resources, including people, to achieve their requirements.

It is important to find ways of resourcing the organisation. This is a complex activity as there are many sources of finance and other resources, and they have to be approached in a way which maintains the integrity of the organisation. It is necessary to be able to specify clearly what the funding objectives are, and which methods will be used to raise funds. Funding sources have to be identified, and then the funds have to be negotiated and secured. This unit covers identifying funding objectives and methods; identifying potential contributors to the organisation; and negotiating and securing funding.

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AJ13.1 Identify funding objectives and methods for the organisation

Performance Required

This will involve:

- a) Establishing and prioritising **objectives for fund-raising**, and clearly specifying and presenting them as a fund-raising strategy
- b) Ensuring funding objectives are realistic and meet the needs of the organisation
- c) Identifying the full range of funding methods and evaluating them for their effectiveness
- d) Ensuring sources of funding and fund-raising methods are in line with the values and policies of the organisation
- e) Passing information on the funding objectives and methods to the **relevant people** in the appropriate formats

Occupational Context

1 Objectives for fund-raising

- Development
- Investment
- Profit
- Maintenance
- acquisitions

2 Relevant people

- fundraisers
- accountants
- directors
- shareholders
- stakeholders
- professional institutions
- benefactors

Knowledge Requirements

You need to know and understand how to:

- Evaluate the effectiveness of funding methods

You need to know about:

The organisation

- The aims and objectives of the fund-raising, and how to present them
- The types of uses there are for the funds
- The rationale behind the prioritisation of funds
- The value of the image of the organisation
- How the fund-raising methods can impact on the image of the organisation

Fundraising

- The funding methods that are available
- The range and variety of different sources of funding
- How the fund-raising meets the needs of the organisation
- Who needs to be aware of the funding objectives and methods

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AJ13.1 Identify funding objectives and methods for the organisation

Required Skills

You should demonstrate:

- Accounting and budgeting
- Fundraising skills

Evidence Required

You should provide evidence that you can identify funding objectives and methods for the organisation

The candidate should be questioned, based upon the documentation provided, to explore how they:

- identify funding objectives and methods for the organisation.

Evidence Rules

The candidate should have been involved in devising and implementing methods to resource of a cultural heritage organisation

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AJ13.2 Identify potential contributors to the organisation

Performance Required

This will involve:

- a) Ensuring information on **potential contributors** is current and accurate
- b) Assessing previous **contribution** patterns for their effect on future contribution levels
- c) Identifying new sources of contributions and informing the appropriate people of the organisation's requirements
- d) Providing clear information on the benefits to contributors
- e) Evaluating rejections from contributors to achieve greater effectiveness in future approaches
- f) Collecting available information on the contribution patterns for other organisations

Occupational Context

1 Potential contributors

- individuals
- groups
- commercial organisations
- public bodies.

2 Contributions

- donations
- sponsorships
- special events
- grants

Knowledge Requirements

You need to know and understand how to:

- Approach different types of contributor
- Maintain current and accurate information on contributors
- Analyse contribution patterns
- Identify new sources of contributions, and who should be contacted
- Evaluate rejections, and what they tend to indicate

You need to know about:

Fund raising

- The objectives of the fund-raising

Sources

- The benefits enjoyed by previous contributors
- The requirements of different types of contributor
- The tax benefits for contributors

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AJ13.2 Identify potential contributors to the organisation

Required Skills

N/A

Evidence Required

You should provide evidence that you can identify potential contributors to the organisation

The candidate should be questioned, based upon the documentation provided, to explore how they:

- identify potential contributors to the organisation.

Evidence Rules

The candidate should have been involved in devising and implementing methods to resource of a cultural heritage organisation

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AJ13.3 Negotiate and secure funding for the organisation

Performance Required

This will involve:

- a) Approaching contributors in an appropriate and professional manner
- b) Establishing clearly the **requirements of the organisation** and agree them with the relevant people
- c) Conducting negotiations within clearly defined parameters in line with the fund-raising strategy
- d) Evaluating offers against the agreed parameters
- e) Presenting proposals and rejections to potential contributors in a clear and precise manner
- f) Ensuring the details of the agreement are accurate, complete and confirmed by all parties
- g) Completing any formal transfers of title or other appropriate rights according to agreement with the contributor
- h) Investigating any problems or liabilities connected to the **contribution**
- i) Maintaining the confidentiality of negotiations in line with the requirements of the contributor
- j) Recording negotiations and securing written agreements for all funding assurances

Occupational Context

1 Requirements of the organisation

- expansion and growth
- acquisition and investment

2 Contributions

- donations
- sponsorships
- special events
- grants

Knowledge Requirements

You need to know and understand how to:

- Assess offers and rejections
- Maintain goodwill during negotiations
- Record the process and results of the negotiation

You need to know about:

Negotiation

- The parameters for the negotiation
- What constitutes an appropriate time and location for the negotiation
- Why negotiation skills are important

Value

- The ideal outcomes of the negotiation for the organisation and the contributor

Formal procedures

- The main types of contractual arrangements that are applicable

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AJ13.3 Negotiate and secure funding for the organisation

Required Skills

You should demonstrate:

- Negotiation skills

Evidence Required

You should provide evidence that you can negotiate and secure funding for the organisation

The candidate should be questioned, based upon the documentation provided, to explore how they:

- negotiate and secure funding for the organisation.

Evidence Rules

The candidate should have been involved in devising and implementing methods to resource of a cultural heritage organisation