
Overview

This standard 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 standard covers identifying funding objectives and methods; identifying potential contributors to the organisation; and negotiating and securing funding.

Performance criteria

You must be able to:

Identify funding objectives and methods for the organisation

- P1 Establish and prioritise objectives for fund raising, and clearly specify and present them as a fund raising strategy
- P2 Ensure funding objectives are realistic and meet the needs of the organisation
- P3 Identify the full range of funding methods and evaluate them for their effectiveness
- P4 Ensure sources of funding and fund raising methods are in line with the values and policies of the organisation
- P5 Pass information on the funding objectives and methods to the relevant people in the appropriate formats

Identify potential contributors to the organisation

- P6 Ensure information on potential contributors is current and accurate
- P7 Assess previous contribution patterns for their effect on future contribution levels
- P8 Identify new sources of contributions and inform the appropriate people of the organisation's requirements
- P9 Provide clear information on the benefits to contributors
- P10 Evaluate rejections from contributors to achieve greater effectiveness in future approaches
- P11 Collect available information on the contribution patterns for other organisations

Negotiate and secure funding for the organisation

- P12 Approach contributors in an appropriate and professional manner
- P13 Establish clearly the requirements of the organisation and agree them with the relevant people
- P14 Conduct negotiations within clearly defined parameters in line with the fund-raising strategy
- P15 Evaluate offers against the agreed parameters

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- P16 Present proposals and rejections to potential contributors in a clear and precise manner
- P17 Ensure the details of the agreement are accurate, complete and confirmed by all parties
- P18 Complete any formal transfers of title or other appropriate rights according to agreement with the contributor
- P19 Investigate any problems or liabilities connected to the contribution
- P20 Maintain the confidentiality of negotiations in line with the requirements of the contributor
- P21 Record negotiations and secure written agreements for all funding assurances

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Knowledge and understanding

You need to know and understand:

- K1 How to evaluate the effectiveness of funding methods
- K2 The aims and objectives of the fund-raising, and how to present them
- K3 The types of uses there are for the funds
- K4 The rationale behind the prioritisation of funds
- K5 The value of the image of the organisation
- K6 How the fund-raising methods can impact on the image of the organisation
- K7 The funding methods that are available
- K8 The range and variety of different sources of funding
- K9 How the fund-raising meets the needs of the organisation
- K10 Who needs to be aware of the funding objectives and methods
- K11 How to approach different types of contributor
- K12 How to maintain current and accurate information on contributors
- K13 How to analyse contribution patterns
- K14 How to identify new sources of contributions, and who should be contacted
- K15 How to evaluate rejections, and what they tend to indicate
- K16 The objectives of the fund-raising
- K17 The benefits enjoyed by previous contributors
- K18 The requirements of different types of contributor
- K19 The tax benefits for contributors
- K20 How to assess offers and rejections
- K21 The importance of maintaining goodwill during negotiations
- K22 How to record the process and results of the negotiation

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K23 The parameters for the negotiation

K24 What constitutes an appropriate time and location for the negotiation

K25 Why negotiation skills are important

K26 The ideal outcomes of the negotiation for the organisation and the contributor

K27 The main types of contractual arrangements that are applicable

Developed by

Version number

Date approved

Indicative review date

Validity

Status

Originating

CCSAPAH13

Devise and implement methods to resource a cultural heritage organisation

organisation

Original URN

Relevant occupations

Suite

Key words
