



Learning Toolkit

Name(s):

Type here

Organisation:

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Role:

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A Message From Cam...

We launched our **L&D Research Report** in 2024 which told us some of the challenges our membership community were facing when it comes to L&D. One of these challenges was that members felt they didn't have the resources needed to navigate, prioritise and track their learning and impact on an individual level.

For example we know that... *"**almost half** of all individuals reported having no personal development plan (PDP), and **only 12%** have a plan that is regularly reviewed."*

But PDP's are just *one* of the ways that you can get serious about mastering '**learning to learn**', there's a host of ways you can plan for your learning and reflect on action taken. Learning also comes in all shapes and sizes, from webinars, conferences, mentoring, coaching, podcasts, meeting a colleague for a coffee or a recent marketing ad you've seen from your favourite coffee brand.

These resources have been created as **a toolkit**, where you can 'grab and go' with what's useful or resonates for you, and leave the rest, to support you making the most out of learning opportunities **everywhere** (see what I did there ;))...

Any questions on how to get better at **learning to learn** get in touch with me, cam@fundraisingeverywhere.com and watch this space for further resources and more ways to interact with FE community on learning soon. If you've got any thoughts with what could help further please do get in touch, I'd love to hear from you.

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Step 1: Mastering L&D Your Skills Inventory

Skills Inventory and Gap Analysis

A skills inventory and gap analysis helps you evaluate your current capabilities, identify areas for improvement, and create a focused plan for areas of growth or confidence.

How to Use This Tool:

1. Complete the Skills Inventory: Assess your current skills, or add additional skills
2. Perform a Gap Analysis: Compare your current skills with the skills or areas you'd love to develop or know more about.

This exercise is designed to empower you to take charge of your learning and development, ensuring your efforts are both strategic and impactful.

Use the provided worksheets to get started!



Mastering L&D: My Skills Inventory

Numbered skills: Mark with a 3 - skills you do well, 2- skills you would love to innovate in or hear new ideas, 1 - skills you'd love to improve or learn

Digital and Online Fundraising Skills

☐

Digital campaign management

☐

Using testing to optimise fundraising strategies

☐

Building and managing email funnels for donor acquisition

☐

Add yours here...

☐

Add yours here...

Storytelling and Communication

☐

Developing multi-channel storytelling approaches

☐

Using data-driven storytelling to connect with donors.

☐

Engaging different audience segments

☐

Public speaking, including virtual and in-person

☐

Add yours here...

Donor Engagement and Stewardship

☐

Understanding donor psychology and motivations

☐

Creating seamless donor journeys

☐

setting up or refreshing regular giving programs

☐

Building donor and audience personas for campaigns

☐

Supporter Experience Journeys

Fundraising Strategy and Planning

☐

Designing multi-year fundraising strategies

☐

Integrating fundraising with organisational strategy.

☐

Developing and embedding successful strategies

☐

Designing successful strategic partnerships

☐

Add yours here...

Mastering L&D: My Skills Inventory

Event Fundraising

☐ Developing creative event themes and concepts

☐ Creating successful event experiences

☐ New trends in events fundraising

☐ Stewardship during events fundraising

☐ Add yours here...

Leadership and Team Development

☐ Empowering teams to adopt data-driven decision-making

☐ Influencing change and leadership buy in

☐ Insight led leadership

☐ Inclusive Leadership

☐ Vulnerable leadership

Inclusivity and Ethical Fundraising

☐ Anti-oppression practices in philanthropy

☐ Mitigating unconscious bias in donor communications

☐ Building ethical, non-extractive relationships with donors

☐ Inclusive digital campaigns & marketing

☐ Add yours here...

Corporate and Major Donor Fundraising

☐ Built long-term partnerships with corporate sponsors

☐ Developing corporate social responsibility (CSR) proposals

☐ Cultivating major donor pipelines

☐ Designing successful strategic partnerships

☐ Creating donor stewardship packages for high-value contributors

Mastering L&D: My Skills Inventory

Innovation and Technology in Fundraising

- ☐ Incorporating AI into fundraising
- ☐ Designing gamified fundraising campaigns to engage donors
- ☐ CRM & Data management
- ☐ Turning ideas into fundraising products
- ☐ Add yours here...

Research and Data Analytics

- ☐ Conducting donor segmentation and profiling
- ☐ Predictive analytics for donor behaviour.
- ☐ Evaluating campaign success through data
- ☐ Leveraging benchmarking data to set realistic fundraising goal
- ☐ Add yours here...

Grant Writing and Institutional Funding

- ☐ Managing post-grant reporting and compliance.
- ☐ Building funder relationships beyond grant applications
- ☐ Collaborative grant writing with multiple stakeholders
- ☐ Diversifying institutional funding sources
- ☐ Engaging policymakers and stakeholders in fundraising efforts

Marketing and Audience Engagement

- ☐ Aligning branding with fundraising objectives for consistent messaging
- ☐ Engaging Gen Z and Millennial donors through emerging platforms
- ☐ Building omnichannel marketing strategies to support campaigns
- ☐ Partnering with influencers and ambassadors for causes
- ☐ Utilising Social media for engagement and acquisition

Mastering L&D: My Skills Inventory

Time to add some of your own

Personal and Professional Development

☐ Time management and prioritisation

☐ Navigating career growth within the nonprofit sector

☐ Building resilience and managing burnout in fundraising roles

☐ Networking and personal branding as a fundraising professional

☐ Add yours here...

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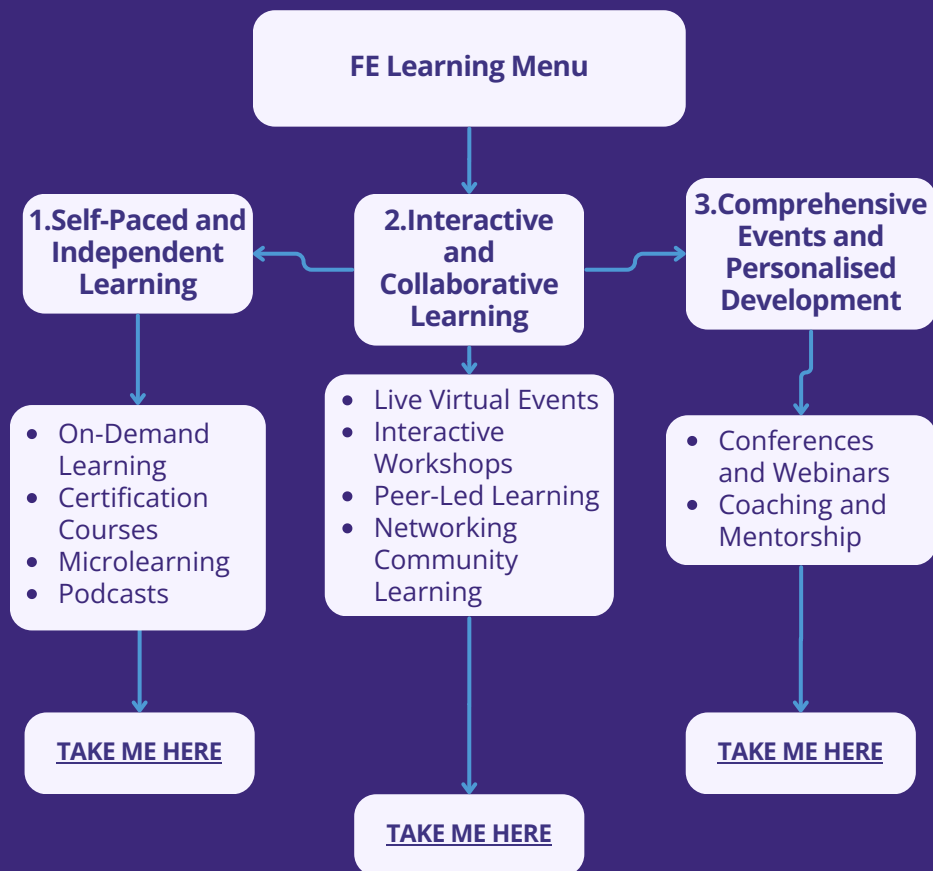
Step 2: Mastering L&D Choosing your learning methods

At Fundraising Everywhere we have a variety of different ways to engage in learning, development and networking have a look below and explore the different tools and types of learning you might want to use.

Take some time to explore the members room and the learning menu below to choose some of the ways you will put your learning goals into action!



Mastering Fundraising Everywhere



Mastering Fundraising Everywhere

Members Room...What's inside...

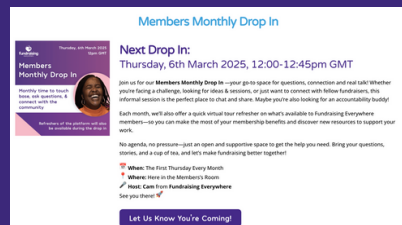
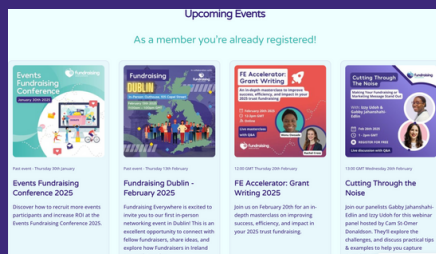
1. Self-Paced and Independent Learning

- On-Demand Learning
- Certification Courses
- Microlearning
- Podcasts



2. Interactive and Collaborative Learning

- Live Virtual Events
- Interactive Workshops
- Peer-Led Learning
- Networking Community Learning



Just click on the images to be taken to this section
p.s. you may need to scroll on the page



Mastering Fundraising Everywhere

Members Room What's inside cont...

3. Comprehensive Events and Personalised Development

- Conferences and Webinars
- Coaching and Mentorship

Just click on the images to be taken to this section p.s. you may need to scroll on the page

Upcoming Members Workshops



How to Stop Companies Ignoring You

Thursday, 27th February 2025, 12pm GMT

Speaker: Andy King, Director of Fireside Fundraising

Corporate fundraising is getting more competitive by the day – for example, HSBC receive 10,000 approaches from charities a year and says yes to less than 5 of these on average.

This session looks at the leading behavioural science behind why budget holders sometimes decide to buy and sometimes don't – including lessons from a successful HSBC approach – with plenty of practical tools, tips and time for questions.

Key learnings from this session:

1. How budget holders make decisions
2. Practical tools that you can use to secure more meetings with corporate partners
3. The level of persistence required for corporate partnerships success

[Sign Up Here – February Workshop](#)



About

Thank you so much for your interest in supporting members of the community with support to indeed reaching out to request support. We want our members to make the most of this offer. As we grow and are receiving more requests for support with fundraising questions, challenges and problems, we are setting a **members matching service** and a new way to manage these requests to see how it works.

Since launching in October we have successfully matched **48 members** through our matchmaking service.

Testimonial

Through the match making service that FF offer, I was incredibly impressed to be quickly paired with an mentor that was a leading fundraiser in my area of research and someone whom I already followed for their outstanding work. They were able to talk through my questions and went above and beyond to help support the development of the strategy I was setting. This has been so impactful not just for my own progression and understanding but also for the finished proposals I'm now submitting to my charity.

Neville Page, Member

To Participate

Let us know if you are interested in our members matching service, and giving support to members of our community here:

[Member Matching Service](#)

Let us know if you are requesting support with a challenge, question or some informal coaching from another member here:

[Informal Member Coaching](#)

Then we'll do the rest to match you up.

Fundraising Everywhere Coaching Team Booking Page



fundraising
everywhere

Welcome. Fundraising Everywhere has partnered with Sarah Tice Coaching Ltd to fund 30-minute coaching sessions for **Fundraising Everywhere Members**. These sessions are free for as long as you're a Member.

If you are grappling with a challenge at work, want to make a change about how you are feeling, or in your career, then you have come to the right place, and the first step to change is as simple as 1, 2, 3.

1. **Choose** - scroll down, and hover over a coach to get a quick summary about how they could help you. Click on the coach that feels right for you, read a little more about them to see if their experience, can help you create the change you want to see.

2. **Book** - your funded 30-minute Coaching Session by clicking the **BOOK NOW** button on chosen coaches page, booking some time in their diary (and yours!)

3. **Prepare** - before you meet think about what you want to get out of your time together.

Now celebrate you have made the first step to change, and thank you for being curious about how coaching could support you to thrive.



Step 3:

Mastering L&D Setting Goals

A Personal Development Plan (PDP) is your roadmap for achieving professional and personal growth through clear, actionable steps. By setting SMART goals (Specific, Measurable, Achievable, Relevant, Time-Bound), a PDP helps you focus your efforts, track progress, and stay accountable to your development objectives.

How to Use Your PDP:

1. Set SMART Goals: Clearly define your objectives with actionable, measurable steps.
2. Assess Current Skills: using the skills inventory completed above.
3. Create an Action Plan: Outline steps, resources, and timelines to achieve each goal, based on your learning menu above.
4. Track and Reflect: Regularly review progress and make adjustments.

Use the templates in this workbook to create your plan and take charge of your learning journey!



Personal Development Plan

Start date:

End date:

Objectives:

What do I want to learn or become?

Actions:

What do I have to do to get there?

Criteria:

How will I know I've achieved this?

Resources:

What resources will I access?

Obstacles:

What might get in the way of achieving this?

Support:

What support will I have?

Review:

How did I do?

SMART L&D Goals

EXAMPLE - **Goal:** Enhance digital fundraising skills through Fundraising Everywhere's resources to improve campaign performance and donor engagement.

Specific	Measurable	Achievable	Relevant	Time-Bound
I will complete a course on digital fundraising strategies through Fundraising Everywhere to develop skills in creating and executing successful online campaigns.	1. Completing the course and downloading relevant certificates 2. Implementing at least two new digital strategies from the course in our next fundraising campaign. 3. Tracking a 10% increase in donor engagement (e.g., email open rates, click-through rates, or social media interactions) after applying the learned strategies.	I will dedicate 30 mins per week to learning and implementing these strategies over the next 6 weeks, ensuring this fits into my current workload.	This goal aligns with my role as a fundraiser and supports my team's objective to increase online donations by expanding our digital outreach efforts	I will complete the course within 6 weeks and implement the new strategies in the next campaign, which is scheduled to launch 2 months from now

Fundraising Everywhere Courses

<https://www.fundraisingeverywhere.com/lobbies/10-tactics-for-jump-starting-a-stalled-digital-fundraising-program/>

<https://www.fundraisingeverywhere.com/lobbies/can-we-talk-mastering-email-strategy-for-better-donor-stewardship/>

My SMART L&D Goals

Specific	Measure	Achievable	Relevant	Time
Example:	Example:	Example:	Example:	Example:



Monthly Reflections

Designed to help you pause, reflect, and capture key insights from the past month. It's a space to recognise what inspired you, what you tried differently, and how those experiences shaped your growth.

Celebrate Inspiration: Reflect on the moments, people, or experiences that motivated you.

Growth: Recognise the impact of trying new things, whether they succeeded or not.

Encourage Learning: Use reflections to identify what worked and how you can build on it.

Stay Grounded: Regular reflection helps you stay connected to your personal and professional growth journey.

How to Use It:

1. What Inspired You This Month?

Think about key moments, ideas, or people that sparked motivation or new perspectives.

2. What Did You Try Differently?

Reflect on any new approaches, strategies, or habits you experimented with.

What worked well, and what could you improve?

3. Celebrate Wins:

What are you proud of this month? Big or small, recognise your achievements.

Use it monthly to celebrate your growth and discover what's next on your journey!



March Goals

What do I want to learn more about?

What did you learn & how?

What have I been
inspired by?

What can I put into
practice and try
differently?

Reflection Time

answer this question and log your response on
page 46. for this month.

**You're about to apply what you've learned.
How do you feel?**

Very confident

Confident

Neutral

Uncertain

Not confident at all

April Goals

What do I want to learn more about?

What did you learn & how?

What have I been
inspired by?

What can I put into
practice and try
differently?

Reflection Time

answer this question and log your response on
page 46. for this month.

**You're about to apply what you've learned.
How do you feel?**

Very confident

Confident

Neutral

Uncertain

Not confident at all

May Goals

What do I want to learn more about?

What did you learn & how?

What have I been
inspired by?

What can I put into
practice and try
differently?

Reflection Time

answer this question and log your response on
page 46. for this month.

**You're about to apply what you've learned.
How do you feel?**

Very confident

Confident

Neutral

Uncertain

Not confident at all

June Goals

What do I want to learn more about?

What did you learn & how?

What have I been
inspired by?

What can I put into
practice and try
differently?

Reflection Time

answer this question and log your response on
page 46. for this month.

**You're about to apply what you've learned.
How do you feel?**

Very confident

Confident

Neutral

Uncertain

Not confident at all

July Goals

What do I want to learn more about?

What did you learn & how?

What have I been
inspired by?

What can I put into
practice and try
differently?

Reflection Time

answer this question and log your response on
page 46. for this month.

**You're about to apply what you've learned.
How do you feel?**

Very confident

Confident

Neutral

Uncertain

Not confident at all

August Goals

What do I want to learn more about?

What did you learn & how?

What have I been
inspired by?

What can I put into
practice and try
differently?

Reflection Time

answer this question and log your response on
page 46. for this month.

**You're about to apply what you've learned.
How do you feel?**

Very confident

Confident

Neutral

Uncertain

Not confident at all

September Goals

What do I want to learn more about?

What did you learn & how?

What have I been
inspired by?

What can I put into
practice and try
differently?

Reflection Time

answer this question and log your response on
page 46. for this month.

**You're about to apply what you've learned.
How do you feel?**

Very confident

Confident

Neutral

Uncertain

Not confident at all

October Goals

What do I want to learn more about?

What did you learn & how?

What have I been
inspired by?

What can I put into
practice and try
differently?

Reflection Time

answer this question and log your response on
page 46. for this month.

**You're about to apply what you've learned.
How do you feel?**

Very confident

Confident

Neutral

Uncertain

Not confident at all

November Goals

What do I want to learn more about?

What did you learn & how?

What have I been
inspired by?

What can I put into
practice and try
differently?

Reflection Time

answer this question and log your response on
page 46. for this month.

**You're about to apply what you've learned.
How do you feel?**

Very confident

Confident

Neutral

Uncertain

Not confident at all

December Goals

What do I want to learn more about?

What did you learn & how?

What have I been
inspired by?

What can I put into
practice and try
differently?

Reflection Time

answer this question and log your response on
page 46. for this month.

**You're about to apply what you've learned.
How do you feel?**

Very confident

Confident

Neutral

Uncertain

Not confident at all

January 2026 Goals

What do I want to learn more about?

What did you learn & how?

What have I been
inspired by?

What can I put into
practice and try
differently?

Reflection Time

answer this question and log your response on
page 46. for this month.

**You're about to apply what you've learned.
How do you feel?**

Very confident

Confident

Neutral

Uncertain

Not confident at all

February 2026 Goals

What do I want to learn more about?

What did you learn & how?

What have I been
inspired by?

What can I put into
practice and try
differently?

Reflection Time

answer this question and log your response on
page 46. for this month.

**You're about to apply what you've learned.
How do you feel?**

Very confident

Confident

Neutral

Uncertain

Not confident at all



My 121 Conversations

Am I making progress toward my learning and development goals, and are there any areas where I should adjust my focus?

Purpose: Get feedback on your progress and ensure your goals align with team and organisational priorities.

Follow-Up: Seek specific examples or actionable suggestions to refine your efforts.

Are there any new opportunities projects, stretch work, or secondments or shadowing that could help me apply or expand the skills I'm working on?

Purpose: Explore real-world applications and gain insight into upcoming opportunities for growth.

Follow-Up: Work with your manager to plan involvement in these opportunities.

What additional feedback or resources can you provide to help me overcome challenges and stay aligned with my development plan?

Purpose: Address challenges and identify support needed to stay on track.

Follow-Up: Discuss actionable steps, such as access to tools, mentorship, or time allocation.

**How can I share with the team?
Is there anything I've shared with
you today that will also be useful
for the team?**

2025 Year Reflections

K - What I Know:

List what you knew about before starting your learning journey

W - What I Wanted to Know:






Note any questions or things you were curious about at the beginning.

L - What I Learned:

Summarise what new knowledge or skills you have gained

Self-Assessment Year 2025

Read each statement in the chart below, copying and pasting the faces according to how you feel about your effort and work.

	I did this all the time
	I tried to do this most of the time
	I did this some of the time
	I did this a little
	I did not do this

Statement	Assessment
Example: I tried my best throughout	
I effectively managed my time	
I challenged myself to do something different.	
I found effective solutions for challenges.	
I clearly understood my L&D goals.	

Peer 360 Feedback Year 2025

Feedback provided by	2 things you did well	1 suggestion for improvement
Example: Jan	<p>1. You did a great job explaining the main idea. It was clear and simple, so everyone could understand it easily.</p> <p>2. I like how you made your learning log so colorful and easy to read. The pictures you used made it fun.</p>	<p>It would be even better if you added more details to the explanations, so we can learn more about the topic.</p>

My Year L&D Review 2025

Mark an 'x' in the box each month during your reflection time based on how you feel about what you set out to learn or be inspired by. At the end of the year come back and tally up all the months which were neutral or above and celebrate your success, perhaps you'll what to revisit some of the topics/areas you marked as below neutral.

	Very Confident	Confident	Neutral	Uncertain	Not Confident at all
March					
April					
May					
June					
July					
August					
September					
October					
November					
December					
January					
February					

Your Upcoming Conferences 2025



Just click on the events to add the watch link to your diary!