



# Less than my job's worth

Is fundraising a profession?  
And does it matter if it isn't?

● Part of Rogare's review of  
fundraising's professional ethics

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**ROGARE**  
THE FUNDRAISING THINK TANK

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## About

Rogare (Latin for 'to ask') is the independent think tank for the global fundraising profession. We are the engine that translates academic ideas into professional practice, and we aim to bring about a paradigm shift in the way fundraisers use theory and evidence to solve their professional challenges.

All Rogare's reports and outputs can be downloaded at [www.rogare.net](http://www.rogare.net)  
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# Foreword



**Simone P. Joyaux, ACFRE, Adv Dip**

Chair, Hartsook Centre for  
Sustainable Philanthropy board,

Does it matter if you and I work in a profession?  
Or in a trade?

I suppose we'd all rather work in a profession.  
It certainly sounds better, I think.

I'm one of those people who fell into the nonprofit  
sector and the fundraising field. Then learned by  
reading and attending conferences and, and...(it's  
for sure that my Masters degree in 20th century  
French and English literature didn't help me much!).

I read all the fundraising and marketing books.  
I listened to the fundraising gurus. I read business  
books and subscribed to the *Harvard Business  
Review* and more. I still do all that. But it's never  
been quite enough for me.

Too often, I've seen board members and CEOs  
insist their own opinions (and power) trump the  
fundraiser's knowledge. These same leaders  
wouldn't talk that way to an accountant or a brain  
surgeon...or even a building contractor.

This common disrespect harms nonprofits and  
beneficiaries and our communities. The contempt  
for fundraising and fundraisers demeans our value  
and commitment.

I see myself as a professional working in a  
profession. How about you?

I want to claim the rights of a profession by ensuring  
that we in the field can define and defend the  
concept. That we can claim the definitions whether  
sociological or Socratic.

I envision the calibre of our knowledge base and  
conversation attains a new level, with more of an  
evidence base and stronger control and a deeper  
understanding of ethics.

I want us to raise more money because we do more  
than insist we're a profession and professionals.

This Rogare green paper can take us to a different  
level. Please read it and join the conversation. 🗨️

# Executive Summary

- There are two broad methods of classifying occupations as professions.
  1. The traditional way is through a stipulative definition of 'professionhood' that assesses the prospective profession against qualifying criteria, such as whether it has a code of conduct or a professional body. This is called the 'sociological approach'.
  2. The alternative is the 'philosophical' approach, which tries to determine, through argument, whether an occupation ought to be considered a profession.
- Measured against a stipulative definition (sociological approach), fundraising's claims to professionhood often fall short.
  - Fundraisers have little 'professional autonomy' to act in the manner they see best.
  - There is no standard body of knowledge fundraisers are required to acquire before they can practise as a fundraiser, nor to continue practising once they have become a fundraiser. For example, 55 per cent of US fundraisers are 'self-taught'.
  - In the UK, fundraisers do not establish or self-regulate their own standards.
  - Fundraising has little in the way of a coherent theory of professional ethics to underpin it.
- Problems associated with not being seen as a profession are that fundraisers are treated with a lack of professional respect, and are viewed as employees who are told what to do, rather than specialists whose advice on matters of income generation is sought.
- The philosophical approach asks whether the prospective profession serves a 'moral ideal' and it becomes a profession by its members declaring their membership of it and committing to abide by the special standards it requires of them.
- The moral ideal served by fundraising is:
  - "Ensuring that charities and other voluntary and nonprofit organisations have sufficient income to carry out their core charitable purpose and improve the lives of their beneficiaries."
- Fundraisers must opt into the profession of fundraising by declaring: "I am a fundraiser."
- This highlights a schism in fundraising whereby many fundraisers appear to profess what they are not: "I am not just a fundraiser."
- With so many people 'falling into' fundraising by accident, the duty on current members of the fundraising profession is to professionalise for the benefit of those fundraisers who come after them, so that the fundraisers of 2030 have a defined entry route into a recognised profession, and the status, trust and legitimacy that entails.

This is a 'green' paper. In other words, it is a discussion paper that raises topics and ideas in order to stimulate further discussion, compared to a white paper, which outlines or describes a more definitive proposition or policy.

It is part of Rogare's ongoing review of fundraising's professional ethics. See also the ethics white paper:

*Rights stuff: fundraising's ethics gap and a new theory of fundraising ethics v1.1.* 

## 1

# The 'profession assumption'

Who had the better notion of philanthropy, Victorians or us 'Moderns'? This was the subject of a semi-serious debate at the Institute of Fundraising National Convention in London in July 2005. One side lined up to say that large scale community and municipal philanthropy done out of a sense of 'duty' was infinitely preferable to an £8-a-month Direct Debit you set up because you were badgered by fundraisers, or donating because of what you got in return for that gift (whether that would be your name on a brick or invitations to nice events). The other side argued precisely the opposite (this might have caricatured the debate somewhat)<sup>1</sup>.

During that debate, Major (now Commissioner) Bill Cochrane of the Salvation Army (a 'Victorian') said: "Amateur and *ad hoc* is the strength of what we do."<sup>2</sup> Speaking from the floor, I retorted that I edited a magazine called 'Professional' Fundraising, not 'Amateur' Fundraising (it got a laugh), and Major Cochrane said that being 'amateur' didn't mean not doing things well. Although a fairly light-hearted debate, it illustrated a serious point: fundraisers have often felt uneasy about describing what they do, collectively, as being 'too professional', which has implications for how they view themselves as members of a 'profession'.

Acknowledged fundraising guru Tony Elischer (2003) wrote almost 15 years ago: "We know we need to be as professional as possible, and in some ways the sector has carried a chip on its shoulder about positioning fundraising as a 'profession' [scare quotes in original]), extending its public image from simply being about well-meaning volunteers collecting a few pounds in their local community."

And yet at the same time many fundraisers, sector leaders, administrators, and commentators simply assume that fundraising is a profession.

The Public Fundraising Regulatory Association (the organisation that used to regulate street fundraising in the UK before it merged with the Institute of Fundraising in 2016) had in 2010 as one of its communications goals, to make face-to-face (F2F) fundraisers a "full and equal part of the fundraising profession" (PFRA 2010 p12)<sup>3</sup>. When considering whether fundraising was promoted as a career, Amanda Shepard (2004), then a recruitment consultant and now a Fellow of Rogare's International Advisory Panel, wondered whether there was "any discernible pattern in how people progress in the *profession*" and then asked what needed to be done to "bring fundraising in line with other *professions*" (my italics). Ken Burnett (2002) refers to the "fundraising profession" 30 times in his book *Relationship Fundraising*. Here's just one example (ibid, p7):

"Fundraisers are members of a profession that is one of the world's most powerful catalysts for change."

Is this true? Not the bit about whether fundraising is one of the world's most powerful catalysts for change. The bit about fundraising being a profession? Is it? And if it isn't, why isn't it? And what does it matter if fundraising isn't a profession? 🗨️

1. When the motion was put to a vote by show of hands, the 'Moderns' clearly won, although the chair rather diplomatically declared a draw.  
2. *Professional Fundraising*, September 2005 p30.

3. To be fair, as head of communications at the PFRA at the time, the goal of making F2F fundraisers a full and accepted part of the fundraising 'profession' was my idea, so I must take the blame for this assumption.

## 2

# What does 'professional' mean? What is a 'profession'?

Before we can look at whether fundraising is a profession, we need to identify some of the things we do not mean when we talk about a 'profession'.

The word 'profession' is often used as a synonym for occupation – a professional sportsman, a professional fundraiser, even a professional thief (if she earns her living by stealing things) (Davis 2010, p92). By describing someone as a professional fundraiser, you are simply saying they are paid for what they do. 'Profession' can also be used to demarcate honest occupations from non-honest ones: plumbing is a profession; stealing is not (ibid). Or it defines certain types of (usually white collar) work: law is a profession; plumbing is not (ibid). The adjective 'professional' also denotes that a person is doing something to the best of her ability, as in 'she did a really professional job on this case for support', or 'the DM appeal was professionally executed'. Referring to someone as 'professional' identifies both a basic level of competence and an ability to go beyond this basic level. It is also a 'moral' reference in that it "implies there are certain exemplary ways of performing the tasks of an occupation" (Donahue 1995, p58). However, being a member of a profession goes further than this: there is a difference between "being a member of a profession and being a 'professional'" (ibid, p57).

What is it, then, that sets membership of a 'profession' apart from other ways that a person could be 'professional'? How is a profession different from, say, a trade or a craft?

It is difficult to pin down a good stipulative definition of a 'profession' (Cheetham and Chivers 2005, p14) partly because there isn't a "single, truly explanatory trait or characteristic...that can join together all occupations called professions beyond the fact of coming to be called professions" (Friedson 1983, p23).

So any definition or description used here is in a sense a fairly arbitrary choice. I've gone with this. A profession is (Professions Australia, nd):

*"A disciplined group of individuals who adhere to ethical standards and who hold themselves out as, and are accepted by the public as possessing special knowledge and skills in a widely recognised body of learning derived from research, education and training at a high level, and who are prepared to apply this knowledge and exercise these skills in the interest of others."*

A more prosaic definition of a profession is offered by academic Geoff Chivers (of Loughborough University in the UK) and Graham Cheetham, who at the time of writing was senior policy advisory to the UK government's Department for Education and Skills (2005, p13):

*"An occupation based upon specialised study, training or experience, the purpose of which is to apply skilled service or advice to others, or to provide technical, managerial or administrative services to, or within, organisations in return for a fee or salary."*

The usual way to assess whether some candidate occupation qualifies as a profession is to consider it against a set of traits standardly exhibited by fully-fledged professions (Bornstein and Bloland 1991, p110; Bloland & Tempel 2004, p6), an approach that because has been developed and led by sociologists is called the 'sociological approach' (Greenwood 1957, p45; Bloland & Tempel 2004, p6), but is also known as the 'functionalist', 'trait' or 'characteristics' approach.

There are many, many different lists of qualifying criteria, one of the first being that of Ernest Greenwood<sup>4</sup>:

1. Systematic theory – knowledge is organised into a body of theory and is intellectual as well as practical (which is why there is a division in some professions between practice and research).
2. Authority – professional authority arises from the gap between the specialist knowledge a professional has (see 1 above) and the comparative lack of knowledge of lay people. Customers (of a trade or craft) can decide what they want and shop around for the best deal. Clients (of a profession) must rely on the judgement of the professional to make their decision.
3. Community sanction – the community of professionals controls entry to the profession, and polices or regulates itself through processes that could include licensing, minimum criteria to enter the profession, and apprenticeships.
4. Ethical codes – prescribing appropriate conduct in various professional relationships with colleagues and clients, and ethical standards that are enforced by the profession. Professionals are motivated by the needs of their clients and the public rather than by self-interest.
5. A culture – consisting of social value (which requires regulation to prevent unqualified people providing the services professionals provide because that service is of such vital value to society), norms (proper ways to behave), and symbols.

Cheetham and Chivers (2005, p7) draw up a composite list of what they call the “characteristics approach” based on ideas of other researchers in this field. A profession:

- Confers status within society
- Organises itself into some sort of professional body
- Is learned – i.e. requires prolonged and specialised training and education
- Is altruistic (oriented towards service rather than profit)
- Offers autonomy within the job role

- Is informed by an ethical code of some kind
- Is non-commercial
- Is self-regulatory
- Is collegial
- Is client-focused.

Trades and crafts do not meet these criteria. For example, they are motivated by profit, not service. They are not by definition altruistic: trades unions exist solely to protect the interests of their members; but professional associations exist not just to represent their members’ interests but to protect the interests of those whom their members serve, and also society itself, and even have a ‘duty’ to do so (Beaton 2010, p4). The kinds of professions that do meet these criteria are the likes of law, medicine, architecture, engineering, accountancy, science, police. See fig 2.1 for a fuller list of professions.

However different academics and researchers employing different sociological approaches and traditions come up with slightly different definitions for a ‘profession’ and so their lists of professions hardly ever contain the same occupations. The only professions that make the grade under all the sociological definitions are the so-called ‘status professions’ of law and medicine (Davis 2010, p93). 

**Fig 2.1 Professions and trades**

**Occupations typically identified as professions under sociological approaches**

Law  
 Medicine  
 Architecture  
 Engineering  
 Accountancy  
 Military officer  
 Science  
 Police officer  
 Clergy  
 Academic  
 Teaching

**‘Emerging’ professions?**

Journalism  
 Marketing  
 Advertising  
 Public relations  
 Librarianship  
 Fundraising?

**Types of occupations typically identified as trades**

Plumber  
 Builder  
 Electrician  
 Baker  
 Decorator  
 Butcher  
 Sales?

4. See <http://www.richardcheeks.com/professor/profattributes-x.htm> for a summary of Greenwood’s ideas.

## 3

# Is fundraising a profession under the sociological approach?

One of the first attempts at a sociological approach to considering whether fundraising qualified as a profession was made by Robert Carbone (1989), who considered the essential components of a profession of fundraising to be:

- Autonomy
- Knowledge of fundraising principles
- Self-regulation
- Career commitment
- Service to a higher cause
- Advocating and monitoring ethical behaviour.

At the end of the 80s, Carbone only considered fundraising to be an “emerging profession” at best (ibid, p45). Six years later, James A. Donahue (1995), a professor of theological ethics, took this sociological/characteristics/functionalist approach to measuring whether fundraising is a profession (see Figure 3.1). As can be seen, fundraising falls short – well short – on a number of important criteria, and fundraising’s average score is 2.85 (ibid p66).

**Figure 3.1: James Donahue’s (1995) sociological assessment of fundraising as a profession, scored out of five.**

- is engaged in a social service that is essential and unique (2.0)
- possesses a high degree of specialised knowledge (1.5)
- possesses the ability to apply a special body of knowledge (1.5)
- is part of a group that is autonomous and claims the right to regulate itself (2.5)
- recognises and affirms a code of ethics (4.0)
- exhibits strong self discipline and accepts personal responsibility for its actions (3.0)
- is committed to and has a concern for the communal interest rather than the self (3.5)
- is more concerned with services rendered than with financial rewards (3.5)
- Average score – 2.85

Here’s another set of qualifying criteria from the start of the current decade that suggests that fundraising still falls well short of professionhood. This was described by Michael Davis, a professor of

philosophy at the Illinois Institute of Technology in Chicago and a senior fellow at the same institute’s Center for the Study of Ethics in the Professions. His speciality is engineering ethics, but he has also written about the professional ethics of journalism, my former ‘profession’ (Davis 2010). Davis starts his exploration of whether journalism is or is not a profession with a list of the arguments that have at one time or another been used to show that journalism is not a profession (ibid p91) – see Figure 3.2. These arguments apply equally to fundraisers.

**Figure 3.2: Michael Davis’s (2010) sociological reasons why journalism is not a profession, adapted for fundraising.**

1. Fundraisers are not licensed
2. Fundraising lacks a body of theoretical knowledge
3. Fundraising has no curriculum, through which all (or even most) fundraisers must pass
4. Fundraisers cannot exclude non-fundraisers (volunteer collectors, fun runners, sponsored eventers and so on) from raising money
5. (Most) fundraisers are not independent consultants but employees, and therefore lack professional autonomy
6. Fundraisers do not serve clients (only employers or the public)
7. Most fundraisers are not members of any professional organisations (such as the Institute of Fundraising)
8. Fundraisers do not have high status or high income (though a few do).

*This is almost a verbatim list. To change it back to Davis’s original, substitute ‘journalists/journalism’ for ‘fundraisers/fundraising’, change the text in the parentheses in No4 to ‘stringers, bloggers, and so on’, and change the text in parentheses in No7 to ‘such as the Society of Professional Journalists’.*

The purpose of this discussion paper is not really to rescore fundraising against a set of sociological criteria, but it is an interesting thought experiment to look at how fundraising in the late 2010s might fare on certain sociological professional traits (from a US and UK perspective, though there are certainly implications for fundraising globally).

### 3.1 Specialist and theoretical knowledge

Fundraising still fares relatively poorly in this area. There is undeniably plenty of research available (see for example Bekkers and Wiepking 2007, 2011). Much of this is research about practice - not practitioner research, but academic research into what works in fundraising. But Boland and Tempel (2004, p12) say: "The fundraising profession has not paid extensive attention to theory building and does not have elegant and practical theories to apply to its work." True, there are theoretical models of donor behaviour (for example, Burnett and Wood 1998; Sargeant and Woodliffe 2007). Much of fundraising's theories derive from Adrian Sargeant and his collaborators, particularly about the role of trust in fundraising (e.g. Sargeant and Lee 2002a, 2002b).

As a variant of marketing, there is plenty of theoretical knowledge from that domain that fundraising could draw upon. Yet little of this is adapted to and applied to fundraising, and fundraising rarely draws on concepts, ideas and insights from other academic or professional disciplines.

There is of course some cross over from marketing, and also from public relations (e.g. Kelly 1998, Waters 2009) and economics (e.g. Andreoni 1990, 2001). But there's very little cross-pollination and consequent theory development from the likes of ethics (though see MacQuillin 2016b), social psychology (though see Sargeant, MacQuillin and Shang 2016), moral philosophy, evolutionary psychology, history, human geography, cultural anthropology and many others.

The theory it does derive, it often derives from within itself. A good example of this is with the concept of 'relationship fundraising' (Burnett 2002): Burnett's original concept was not based on the concept of relationship marketing (Sargeant 2016, p22), and the development of the concept of relationship fundraising has not drawn on theory from relationship marketing (see *ibid*), much less any theory relating to organisation-public relationships (OPRs) derived from the academic field of public relations (e.g. Ledingham and Bruning 2000).

This is a phenomenon that is also apparent in how fundraising has treated the question of its own professional status. While some of the early work

6 *'As a variant of marketing, there is plenty of theoretical knowledge from that domain that fundraising could draw upon. Yet little of this is adapted to and applied to fundraising, and fundraising rarely draws on concepts, ideas and insights from other academic or professional disciplines.'*

drew on theories of professionhood developed outside the sector, much subsequent work draws only from those theorists who have written about fundraising professionalisation, not the professions generally, and so knowledge is recycled rather than enriched (see for example, the literature review at the start of Scaife and Madden 2006, which is an excellent summary of the fundraising literature, but does not draw on ideas outside of fundraising).

Another issue relating to the specialist and theoretical knowledge that underpins fundraising is that the academic discipline of fundraising has no obvious academic home, being variously housed at universities in business schools (which is where, for example, the Hartsook Centre for Sustainable Philanthropy and Rogare were located at Plymouth University), or within the faculties of marketing, PR or nonprofit management (Mack et al 2016). And there are only two specialist academic journals for fundraising (*Nonprofit and Voluntary Sector Quarterly*, and *International Journal of Nonprofit and Voluntary Sector Marketing*) compared with what can seem like a plethora for PR and marketing.

Then there is the question of whether practising fundraisers have access to this specialist, theoretical knowledge and if they do, do they sufficiently understand it to be able to apply it to their jobs? In fact, a further question is, do they even want to access and understand this knowledge?

### 3.2 Formal qualification and barriers to entry

One of the main ways that professions ensure their members acquire the requisite knowledge to enable them to perform their professional functions is by requiring them to pass through a formal educational process before full admission to the profession. In this way, the profession controls who can and can't practise and ensures standards are maintained at a high level by excluding from practise those who

do not have the required knowledge. This is how the status professions of medicine and law operate, while other professions such as accountancy and surveying require new entrants to complete their formal professional education on the job.

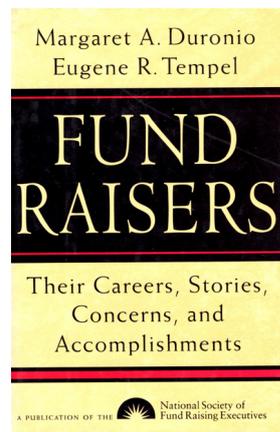
Fundraising has no such barrier to entry. Anyone can become a fundraiser, and becoming a full-time professional (i.e. paid) fundraiser is not dependent on formally demonstrating how much that candidate knows about fundraising – which was one of Carbone’s (1989) criteria for professionhood, while controlling who enters the profession and debarring those who aren’t qualified was one of Greenwood’s criteria way back in 1957.

Many professional associations run non-compulsory education programmes, such as the Institute of Fundraising’s (IoF) range of qualifications<sup>5</sup> – Certificate, Diploma and International Advanced Diploma, the last delivered in conjunction with the Association of Fundraising Professionals (AFP) in the USA – and the AFP’s Fundraising Principles and Practice course.<sup>6</sup>

Yet university teaching in fundraising at a higher education level is rare. While fundraising is available at second degree level, such as Avila University’s MA in Management with an Emphasis on Fundraising<sup>7</sup>, it appears that there is just a single undergraduate degree that specialises in fundraising globally, Chichester University’s BA in Charity Development<sup>8</sup> (which doesn’t even call itself a fundraising degree). When Chichester’s degree was launched in 2013, one nonprofit academic questioned whether a degree in fundraising was “too specialised” (Schumate 2013).

There is little in the way of formal continuing professional development (CPD) for fundraisers, and only one way of accrediting what they already know – the Certified Fund Raising Executive (CFRE). None of these processes of acquiring or assessing knowledge is mandatory.

Sarah Nathan of the Fundraising School at Indiana University is currently working with Gene Tempel



The update of Tempel and Duronio’s groundbreaking 1990s research has found that 55 per cent of American fundraisers say they are “self-taught”.

to update the groundbreaking work Tempel and Margaret (Peg) Duronio carried out in the 1990s into fundraisers’ careers and accomplishments (Tempel and Duronio 1997). Her research has revealed how American fundraisers have acquired their professional knowledge (see Figure 3.3) (Nathan 2017). This shows that while only a fifth of paid fundraisers in the USA acquired their knowledge about fundraising through formal study, more than half describe themselves as ‘self-taught’. That means fundraising in the USA is a ‘profession’ where more than half the members taught themselves how to deliver the professional function.

Large numbers of fundraisers also acquired their knowledge through ‘professional education’ (i.e. conferences, workshops etc.) and mentoring, which means the quality of the knowledge they acquired would only have been as good as the quality of knowledge previously acquired by their mentors and conference presenters.

**Figure 3.3: How do fundraisers in the USA acquire their professional knowledge? (Nathan 2017)**

Formal education	21.1%
Certification	24.4%
Professional education (conferences etc.)	70.8%
Mentoring	57.8%
On job training	92.8%
Self-taught	55.6%
Other	7.4%

Furthermore, 748 British fundraisers hold the IoF’s Certificate in Fundraising (with a further 253 Diploma holders and five who have achieved the International Advanced Diploma – though most holders of a higher qualification will have done the Certificate). Adding in those fundraisers who hold the earlier, now discontinued, qualification,

5. <http://www.institute-of-fundraising.org.uk/events-and-training/qualifications/> - accessed 15 February 2017

6. <http://www.afpnet.org/Professional/ProgramDetail.cfm?ItemNumber=4395&navItemNumber=38062> - accessed 15 February 2017

7. <https://www.avila.edu/academics/professional-studies-avila-advantage-adult/masters-degree-programs/management-fundraising> - accessed 15 February 2017

8. <http://www.chi.ac.uk/business-school/undergraduate/degree-routes/ba-honscharity-development> - accessed 15 February 2017

the Certificate in Fundraising Management, the total number of fundraisers holding a professional qualification is 2,578<sup>9</sup>. With the IoF's membership standing at just over 6,000, that's roughly 40 per cent of the members of the UK's professional body holding a professional qualification, which doesn't appear too bad, and on a par with the combined formal education and certification routes in the USA. But 60 per cent of IoF members still don't hold a professional qualification, not counting all those fundraisers who are not members of their professional body.

As it stands in fundraising in the USA and the UK (and in many other parts of the world), formal knowledge of fundraising is not required to become a 'professional' fundraiser, neither is acquisition of that knowledge a requirement to continue to work as paid fundraiser.

### 3.3 Ethics

All sociological approaches to the professions emphasise the central requirement for ethics. Donahue (1995) scores this incredibly highly in his assessment of whether fundraising is a profession – 4.0 out of 5.0, the highest score he awarded against any of the criteria. So according to Donahue, fundraising is most like a profession in how ethical it is. Is fundraising really that ethical?

Donahue (ibid, p66) rates fundraising so highly on its ethicality because of the "proliferation" of nonprofits drawing up their own ethical codes, as well as formal profession-wide codes by representative bodies. This, Donahue says (ibid), "represents a desire to scrutinize one's own colleagues as well as to be able to be relied upon by the public to carry out the practices of the profession in a responsible manner".

This is dependent on three things: a) are the ethical codes actually any good? b) do fundraisers understand the ethical codes and how to interpret them? c) do the ethical codes carry any force and coercive power (which Donahue said they did not in 1995)?

It seems to me that Donahue was a bit over-eager and premature in rating fundraising's professional ethics so highly. As I have argued in Rogare's white paper on developing a new rights-based theory of fundraising ethics (MacQuillin 2016b), fundraising's

professional ethics are confused and contradictory. Moreover, they are mostly applied ethics contained in various codes of practice, telling fundraisers *what* they may or may not do. But fundraising has little – next to nothing – in the way of normative ethics: theories, concepts and ideas that will help fundraisers understand *why* they may or may not do certain things, and help them make better ethical justifications for the courses of action they take.

Furthermore, there has been very little actual theory development in fundraising ethics. Although there was a spate of writing in the mid-1990s coming out of the Center on Philanthropy at Indiana University and the Association of Fundraising Professionals, the two main academic journals that feature fundraising literature (*NVSQ* and *IJNVSM*) have each carried just one article on fundraising ethics since 2000 (ibid, p8). And there are just two single-author books about fundraising ethics, Albert Anderson's *Ethics for Fundraisers* (1996) and Marilyn Fischer's *Ethical Decision Making in Fundraising* (2000).

In terms of practice, the events in the UK that were set in train by the suicide of Olive Cooke – whose death was wrongly attributed by the media to the amount of direct mail fundraising she received (MacQuillin 2016b, p4) – suggest that it is possible to construct a plausible argument that at the very least fundraising's professional ethics have failed to prevent unethical behaviour by some fundraisers, and at worst that some fundraisers have deliberately embarked on actions that they ought to have known contravened their occupation's professional ethics (I suppose the very worst case scenario is that some fundraisers actually knew what they were doing was unethical and went ahead with it regardless).

That these arguments are plausible is in part because fundraising has little or no normative foundation upon which to build its applied ethics. And so when serious ethical dilemmas or problems are encountered, fundraisers almost literally have to make up their applied ethics as they go along, running a huge risk that they will not get this as right as they could have done, because they are not able to draw on an existing canon of ethical thinking and theory development.

9. Information provided by IoF via email, 15/16 February 2017.

6 *'The events in the UK that were set in train by the suicide of Olive Cooke suggest that it is possible to construct a plausible argument that at the very least fundraising's professional ethics have failed to prevent unethical behaviour by some fundraisers, and at worst that some fundraisers have deliberately embarked on actions that they ought to have known contravened their occupation's professional ethics.'*

### 3.4 Clients, autonomy and self-regulation

One of the most important components of Carbone's and Donahue's lists as they relate to fundraising, and in all lists as they relate to professions generally, is the concept of 'professional autonomy', which Donahue scored, along with the right to self-regulate, at the mid-way mark. 'Professional autonomy' is the genuine freedom to use Greenwood's (1957) concept of 'professional authority' to act and make decisions in employing professional skills – in other words, the professional is not coerced or dependent (Kasher 2005, p88). Professional autonomy is usually taken to mean that professionals have the right of self-regulation and to set their own standards (Brien 1998, p391), because they can't exercise professional autonomy if someone else sets their standards for them.

Professionals exercise professional autonomy to act in the best interest of the client. But the question for fundraisers is, who is their client? Fundraisers don't have clients in the sense that doctors, lawyers, architects etc do. But they do have stakeholder groups they service, who could be considered to be their 'clients'. The most obvious candidate for fundraisers' client group is donors – the people who give to the charity. That would probably be the default answer for many fundraisers, and 'donorcentrism' – putting donors at the 'heart' of fundraisers' activities – is both best practice (Burnett 2002, Burk 2003, MacQuillin 2016a pp12-16) and an ethical theory (MacQuillin 2016b p14).

Another idea prevalent in the ethical literature is that developed by Hank Rosso, that fundraising is the "servant" of philanthropy (Tempel 2004, p4). Under the service of philanthropy idea, the point of fundraising is to help donors bring meaning to

their philanthropy (ibid), or that fundraisers ought to be 'moral trainers' to philanthropists, providing people with "opportunities and incentives to practice generous acts and therefore become generous" (O'Neil 1994, pp4-5). It's with the idea that they are 'servants of philanthropy' that fundraisers perhaps come closest to being true professionals in the sense that they have clients in the way that doctors and lawyers have clients: in this case, fundraisers' clients would be those people who want to give money to charity, and fundraisers exercise their professional autonomy in advising them about the ways to do this that will bring most meaning to them. Fundraisers therefore become more like 'philanthropic advisors'.

But this is a conditional argument that is true if donors are fundraisers' clients, and arguably, they are not, at least not their only 'client'.

Exercising such professional autonomy could require a fundraiser to suggest that a donor doesn't give to a charity the fundraiser works for, but instead direct the donor to a different charity or cause, if giving to that cause would be more meaningful to the donor. In the same way that a medical professional would have the autonomy to decide not to perform a particular operation if it were not in the interest of the patient, so a fundraiser would not accept a donation if making that donation were not in the interest of the donor.

However, the International Statement of Ethical Principles in Fundraising (Association of Fundraising Professionals, 2006) developed by the AFP, requires fundraisers to be "strictly answerable" to all stakeholders, including their donors, their organisations, and their beneficiaries. This is problematic since a fundraiser can only be answerable (let alone 'strictly' answerable) to all three when their interests align.

In the case of a donor who might derive more meaning from giving to a different charity, the interests of the donor on one side, and the organisation and its beneficiaries on the other, do not align. And yet professional ethics – following the service of philanthropy ethic – requires the fundraiser to exercise her autonomy in favour of the donor at the potential expense of the beneficiary. This suggests there might be something amiss with the theory.

While for a professional, his or her employer cannot be a 'client', the intuitive failure of the 'philanthropic advisor' notion of a fundraiser suggests that we need to consider whether there are other candidate clients for fundraisers. The next most likely candidates are charity beneficiaries. Perhaps fundraisers have a twin 'client' base - donors and beneficiaries - whose interests do not always align, but they still need to use their professional autonomy to act in the best interests of both.

Therefore, fundraisers need to use professional judgement in order to balance their duties and responsibilities to both stakeholder ('client') groups to ensure a mutually optimal outcome. This is why Rogare has been developing what we call 'Rights Balancing Fundraising Ethics' - to provide fundraisers with the ethical tools to make exactly that judgement call (MacQuillin 2016b). Having said that, it will be difficult to conceive of beneficiaries as genuine 'clients' of a professional fundraiser, since fundraisers do not serve them directly, and (usually) have no direct relationship with them. At best, beneficiaries would be 'proxy' clients'.

It could also suggest that it's fundraising consultants that best embody the idea of fundraising as a profession, since consultants clearly do have clients - the organisations that engage their services and listen to and act on their advice.

One of the differences between professions and trades is that a customer tells a tradesman what he wants done, but a client asks the advice of the professional about what needs to be done. Therefore not only would you expect the 'organisation' (one of the stakeholders to whom fundraisers must be "strictly answerable") to seek and listen to fundraisers' advice, but that fundraisers would also have the confidence to exercise their professional autonomy to speak against anything that compromised their clients' interests.

However, practitioner folklore is replete with stories and anecdotes where this is exactly the opposite. Many fundraisers have tales to tell about how boards or CEOs have intervened in fundraising on a personal whim (epitomised by the possibly not so apocryphal tale of the chair's wife receiving a telephone call and the next day the fundraising department being ordered to suspend all telephone fundraising). While much of this is

anecdotal, examples are dotted around in research. For example, Kent University's Beth Breeze, who is currently working on a project to evaluate the traits of successful fundraisers, has illustrated the lack of professional respect for fundraising from the board and senior management team, of which the following are typical examples (Breeze, 2017):

*"Your team is good at drinking champagne and asking rich men for money" (p150.)*

*"They just expect you to wave a magic wand and come back with a big pot of money, no questions asked" (p143).*

*"Here comes our fundraiser, look out for your wallet" (p145).*

A common complaint from fundraisers (on both sides of the Atlantic) who took part in Rogare's relationship fundraising research was that while they wanted to put in place a long-term relationship fundraising process, this was often thwarted by boards and senior management teams who wouldn't invest in this, and imposed short-term targets that would need to be met through more transactional techniques (MacQuillin 2016a, pp17-18).

Too often, it seems, fundraisers are treated like tradespeople and told by CEOs, boards and finance directors what they must do, rather than the boards and SMTs of nonprofits seeking their advice.

Part of the problem lies with the sentiments embodied in the International Statement - that fundraisers need to be "strictly answerable" to their stakeholders. This serves to rob them of at least some degree of professional autonomy, while empowering others to treat them as tradespeople, by telling fundraisers what they must do, and then making fundraisers answerable for that. Doctors, after all, are not "strictly answerable" to their patients, pharmaceutical companies, or even health boards.

It would seem sensible at some point to properly research the level of professional autonomy that fundraisers feel they are able - or are permitted - to exercise within their organisations.

There is also the question of how much fundraisers can exercise their professional autonomy outside of their organisation in support of the interests of their profession, in terms of how they advocate what their profession does and how they self-regulate.

Anecdotal evidence suggests individual fundraisers have been very reluctant to speak up and defend their profession when it comes under attack (or less pejoratively, criticism), particularly from the media (MacQuillin 2003a), but also from politicians and regulators. For example, one of the things that drove senior British fundraiser Alan Gosschalk to establish the ImpACT Coalition in 2005 was the refusal of so many senior fundraisers to speak to BBC Radio 4 (MacQuillin 2005, p17). Fundraisers often rely on organisations or bodies that are peripheral to or even outside the profession to speak on their behalf. The ImpACT Coalition is one example of this (ibid), whereas charities running face-to-face programmes in the UK preferred their regulator-cum-trade body, the Public Fundraising Regulatory Association, to defend and advocate F2F so they didn't have to (MacQuillin 2013).

In the USA, one of the bodies that has taken it upon itself to speak up for fundraising is the Charity Defense Council, set up by Dan Pallotta partly in response to the media fallout that led to the collapse of his fundraising events agency and the failure of his charity clients to defend their use of it (Pallotta 2009, pp191-228).

There are also anecdotal examples (although I have some of these on good authority) of fundraisers in the UK who have been prevented (or more pejoratively, silenced) by their comms teams from publicly discussing important issues in fundraising on the grounds that this would pose a reputational risk for their NGO.

The research that quantifies how much fundraisers are either prevented from, are reluctant to, or voluntarily refrain from the exercise of their professional autonomy in advocacy of their profession remains to be done.

I have already pointed out that the main way autonomy is enshrined in professions is through the right of the profession to first set and then to

6 *'It remains to be seen what harm this severe loss of professional autonomy will do to fundraising in England and Wales. But it may be something from which fundraising in these two home nations never fully recovers.'*

self-regulate its standards (Brien 1998, p391, p396), despite the weakness that often comes with self-regulation of a profession's own codes - a lack of effective enforcement action or a lack of will to take enforcement action (ibid, p392).

That right was removed from fundraising in England and Wales<sup>10</sup> in July 2016 when the Fundraising Regulator took over the code of practice from the Institute of Fundraising, and adjudication of complaints against breaches of the code from the Fundraising Standards Board (FRSB), which was abolished.

Unusually, the Fundraising Regulator both sets and enforces standards, where in many other fields, those roles are done by separate bodies: for example, the Committee of Advertising Practice (composed of industry bodies and their representatives) sets the standards for the UK's advertising industry, while the Advertising Standards Authority enforces those standards. The same model had existed with the IoF and FRSB.

These changes effectively mean that English and Welsh fundraising has no control over the standards it works to: those standards - and I think we'll increasingly see, professional ethics - are set by a body external to the fundraising 'profession' and fundraisers are then required to adhere to those standards.

It remains to be seen what harm this severe loss of professional autonomy will do to fundraising in England and Wales. But it may be something from which fundraising in these two home nations never fully recovers.

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10 Scotland has decided not to be part of this new regulatory regime.

*‘Part of the problem lies with the sentiments embodied in the International Statement – that fundraisers need to be “strictly answerable” to their stakeholders.*

6

*This serves to rob them of at least some degree of professional autonomy, while empowering others to treat them as tradespeople, by telling fundraisers what they must do.’*

### 3.5 Is fundraising a profession – sociologically speaking?

Almost any halfway rigorous examination of the occupation of fundraising using a sociological/functional/traits/characteristic approach is almost bound to conclude that fundraising is not a profession. At best it remains an emergent profession; at worst it is a trade, little different to sales.

Fundraising still does not have the “elegant theories” (Bloland and Tempel 2004, p12) it needs to apply to its practical work. It’s questionable whether most fundraisers know about and understand those theories that do exist. As there are no barriers to entry to being a paid fundraiser: anyone can enter this ‘profession’ without knowing anything about the professional work they’re required to carry out. In fact, 55 per cent of American fundraisers claim to be “self-taught” (Nathan 2017). Fundraising’s professional ethics are incoherent and rather unsophisticated (MacQuillin 2016b).

Fundraisers also lack professional autonomy to act in the interests of their clients (and many probably don’t even consider their beneficiaries to be ‘clients’). And the most severe diminution of their professional autonomy has occurred in England and Wales, where fundraisers have lost the right to set and self-regulate their own professional standards – a move that was incidentally “welcomed”<sup>11</sup> by the

Institute of Fundraising (the professional body!), which said that it never actually owned those standards at all, but was merely their “custodian” (Radojev 2016).

Despite Tempel and Bloland’s (2004, pp8-9, pp10-11) criticisms of the sociological, traits-list approach (some of which I share) – particularly that the traits are not given any kind of weighting according to their importance and relevance – fundraising appears to fall short in the most important aspects summarised above, particularly in the UK.

Is there an alternative approach to professional status that can rescue fundraising’s aspirations to professionhood? 6

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11. IoF press release – <http://www.institute-of-fundraising.org.uk/about-us/news/iof-chief-executive-welcomes-launch-of-fundraising-regulator/> – accessed 16 February 2017.

## 4

# An alternative – the ‘philosophical approach’ to professionhood

Michael Davis – the Chicago philosophy professor we encountered earlier – takes a different approach to arguing why journalism really is a profession, even though, as he demonstrates, it falls short using a sociological approach (see Figure 3.2).

Rather than set qualifying conditions, he looks at the question from the other end. He takes a “philosophical approach” (Davis 2010, p94), which starts out to answer the question of what members of the prospective professions “really think a profession is” (ibid, 95). It requires debate, re-evaluation, more debate, reformulation and, finally, arrives at a definition of what members of a profession are trying to achieve and do, rather than a stipulative list of qualifying criteria. Because the definition is arrived at by reiterated conversation and dialogue, Davis calls it a ‘Socratic definition’ (ibid). His Socratic definition of a profession is (ibid):

*A profession is a number of individuals in the same occupation voluntarily organised to earn a living by openly serving a moral ideal in a morally permissible way, beyond what law, market, morality and public opinion would otherwise require.*

Can fundraising be adjudged a profession against Davis’s Socratic definition<sup>12</sup>?

**Group undertaking** This definition requires that a profession is a group undertaking. Nothing can be a profession if it is done just by one person; experts, artists and craftspeople are one of a kind (ibid). Fundraising clearly is a group undertaking.

**Moral ideal** Davis says that an occupation “cannot be a profession unless it serves a moral ideal” (ibid p96) and cites as examples the moral ideals of



Michael Davis, the Chicago philosophy professor, who favours the ‘Socratic’ approach to professionhood, which requires people to declare their membership of the of the profession.

doctors who cure the sick and keep people healthy, lawyers who help people find justice, accountants who present useful financial information, and engineers who “improve the material condition of humanity” (ibid). I think fundraisers can lay a great claim to be serving a moral ideal, especially when compared to engineers and accountants:

*Fundraisers ensure that charities and other voluntary and nonprofit organisations have sufficient income to carry out their core charitable purpose and improve the lives of their beneficiaries.*

If that is not a moral ideal, I’m honestly not sure what is<sup>13</sup>.

12 This section of the green paper is heavily indebted to Davis’s ideas and arguments. If both his and my essays were songs, they would share the same chord progression and have suspiciously-similar middle eights.

13 It should be borne in mind that this is not a stipulative definition of fundraising: this is the moral ideal that fundraisers serve, but it is not a definition of what fundraisers do, because other staff at charities (be they professionals or not) who are involved in income generation also serve this moral ideal, such as financial managers who invest a nonprofit’s reserves. Incidentally, Davis (2010, p98) says that moral ideals are not a synonym for ‘public service’. Even though all the examples he gives, as well as the case for fundraisers serving a moral ideal I have just made, can all easily be understood in terms of public service, some moral ideals – such as astrophysics – satisfy the moral ideal of seeking knowledge but provide no public services as a result of that: it is knowledge seeking for its own sake.

6 *'People who declare themselves to be members of the fundraising profession agree to meet its 'special standards', which go beyond what law, market, morality and public opinion require.'*

Ken Burnett (2002, p6) hits the nail on the head, describing the importance of the "crucial" role of fundraising thus: "Each of the service organisations for which fundraisers work can only succeed if it receives the voluntary financial support that pays for the work it does. It is up to fundraisers to make this happen."

This contrasts with James A. Donahue's sociological approach that we encountered earlier. Donahue argues that to be classed as a profession, an occupation must be "engaged in an essential and unique social service" (Donahue 1995, p60). He then argues that fundraising falls rather short in this area, scoring just 2.0, because the skills that fundraisers use are not unique since they are "duplicated in many other occupational contexts", by which I understand him to be referring to commercial sales and marketing. He says therefore that the skills fundraisers employ are "essential" but only in a "weak sense of that term" (ibid p65). I have to say that I couldn't disagree more with Donahue's conclusions here.

**Morally permissible** Fundraising is certainly morally permissible. At the very real risk of begging the question, I think servicing the moral ideal by asking people to support charities *is* morally permissible, to the point that it hardly seems worth using column inches to justify it. For sure, some people probably believe that fundraising is (or at least certain types of fundraising are) not morally permissible. However, if fundraising is not morally permissible, then fundraising necessarily cannot be a profession.

### **Beyond law, market, morality and public opinion**

Once we have established a moral ideal, it is necessary that one serves this ideal by "setting and generally following appropriate special standards for carrying on its occupation that go beyond what law, market, morality and public opinion would otherwise require" (Davis 2010, p96). Davis illustrates this by comparing a mercenary soldier with a professional soldier. To be a good mercenary, the soldier has only to meet the terms of his contract

(what the law and market require of him). However, the professional soldier must go beyond this, "for example, serve one's country honourably, even when the contract of employment, ordinary morality, law and public opinion do not require it" (ibid).

Davis says that the "special standards" that result from going beyond law, market, morality and public opinion<sup>14</sup> are morally binding on every member of the profession, "simply by being members of that profession" (ibid). This presents a good illustration why a Socratic definition of a profession does not require a long list of qualifying criteria. Under a sociological approach to defining a profession, a professional body might set a code of practice or a code of ethics that is binding on all members of that organisation. This code would undoubtedly be the embodiment of a number of special standards. We could consider, as an example, the Fundraising Regulator's code of fundraising practice and its 'Fundraising Promise', or the AFP's International Statement on Ethical Principles in Fundraising, and Donor Bill of Rights.

Among other things, the International Statement requires fundraisers working for organisations whose national membership bodies are signatories to the statement to respect the rights and dignity of donors and beneficiaries and not put pressure on people to make a gift. Both of these are special standards that go beyond ordinary morality - there is nothing in our everyday morality that compels us not to put pressure on people to make a gift (we do this all the time, especially to close relatives in December) or respect people's 'dignity' (if there were, certain stand-up comics would be out of a job).

Under a sociological approach, these special standards are only binding on members of the profession who join the organisations that set the codes. The International Statement is morally binding on fundraisers who work for organisations that are members of national bodies that have signed the International Statement, *because* they work for organisations that are members of national bodies that have signed the International Statement.

<sup>14</sup> On the face of it, fundraisers often appear to do a lot less than what 'public opinion' requires of them. Public opinion often 'requires' that fundraisers don't get paid, spend virtually nothing on raising money, and even refrain from asking for money, along with various other qualifications and constraints that, if followed, would drastically inhibit charities' abilities to raise money and compromise the moral ideal that fundraisers serve. So fundraisers actually do go beyond public opinion - they go beyond by doing on certain occasions what the public wants them not to do because not doing so would compromise their moral ideal.

However, under the philosophical approach and the Socratic definition, special standards are morally binding on *all* members of the profession, irrespective of whether they have joined the bodies that write and enforce the codes. "These binding standards are what constitute the profession's essential organisation, not its learned societies or regulatory agencies" (ibid). So while a code of ethics may be one of the documents that enshrines one or more of the special standards, a Socratic definition of a profession – including the profession of fundraising – does not require a code of ethics<sup>15</sup> (ibid, p98).

The "central question in the philosophy of the professions" therefore is, how can standards that go beyond what is required of an everyday morality be made morally binding on all members of a profession (ibid, pp96-97). Davis's answer to this question is that professions must be "professed". In other words, professions must be "declared or claimed": "Physicians must declare themselves to be physicians, lawyers must claim to be lawyers, engineers must say they are engineers, and so on" (ibid, p97). And fundraisers must declare that they are fundraisers. Andrew Brien (1998, p404), a New Zealand expert on professional ethics, also points out that by obtaining membership of a profession, a person "promises to abide by the norms that exist within that group".

According to Davis (2010, p97) members of a profession will therefore be those people who:

- a. demonstrate an entitlement to be a part of the profession (which can be through training, certification, or experience)
- b. wish to be a part of the profession, and
- c. speak up accordingly.

The special standards of the profession – which do not lie solely, perhaps not even mostly, in the codes drawn up by regulatory and professional bodies, but also exist through received wisdom

and best practice – are morally binding on all who declare membership of the profession. Conduct is then 'unprofessional' if it is inconsistent with the profession's standards and special standards.

This means, for example that all English and Welsh fundraisers who consider themselves members of a profession of fundraising behave unprofessionally if they put "undue" pressure on people to make a gift, not just those who work for 'charitable organisations' covered in England by the Fundraising Regulator, which sets the code that prohibits the exercise of "undue" pressure<sup>16</sup>.

But it does mean that only declared members of the fundraising profession can behave unprofessionally: since only members of the profession are subject to its professional standards, only they can violate them (ibid, p98). Someone who is not a member of the fundraising profession – such as a fun runner, someone doing a sponsored challenge event, perhaps a volunteer tin rattler or a celebrity patron – cannot behave 'unprofessionally' in a fundraising context. True, they might be a crook, an impostor, or just not very good at raising money; but if they were at any time to put pressure on a person to make a donation, they would not be behaving 'unprofessionally' because, as non-members of the fundraising profession, fundraising's special standards are not binding on them.

What then, are the special standards to which declared professional fundraisers must conform, but not those people raising money for charity but who are not members of the fundraising profession? These special standards will be a mix of legal and regulatory requirements, ethics and best practice. They would probably include some or all of the following (a non- exhaustive list compiled from various codes of practice, best practice texts, and one example from Rogare's theory of Rights Balancing Fundraising Ethics):

- Ensure donors' wishes are respected
- Thank donors promptly
- Never put (undue) pressure on a person to give
- Do not take a percentage or other amount of a

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15 Davis [2010, p98] says the omission of a requirement for a code of ethics from the Socratic Definition is "deliberate and important" because, although such formal codes are usually central to professions in English-speaking countries, they rarely existed elsewhere until after the Second World War, even though professions managed to exist in those countries in the absence of codified ethics. Sociological approaches to defining professions however, put great store by a code of ethics. Fundraising in 1995 scored higher for having a code of ethics under Donahue's (1995) ranking system than for anything else, even though this was an optimistic ranking. Trying to impose such an Anglophone code of practice on a non-Anglophone country can cause a lot of friction, as happened when the Association of Fundraising Professionals tried to establish a chapter in Italy in 2001. Italian fundraisers reacted angrily and accused the AFP of trying to force on them "bylaws, structures and a code of ethics that weren't appropriate" (Mason 2002, p22).

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16 The UK's code of practices says fundraisers must not exert "undue" pressure on people to make a gift, whereas the International Statement says they must not exert any pressure at all, period, whether that pressure is 'undue' or not. The UK's interpretation suggests that if fundraisers are not allowed to exert 'undue' pressure, then some pressure is 'due' or permissible. Ditto "unreasonable" intrusion in a person's privacy and "unreasonably persistent" approaches for a donation, both of which are also proscribed by the code of practice.

donation as commission

- Avoid a conflict of interest between your cause/charity and potential donors
- Provide information about how a donation has been used
- Use a donation for the purpose for which it was given
- Balance their duties to their donors and beneficiaries to ensure a mutually optimal outcome
- Etc, etc.

People who declare themselves to be members of the fundraising profession agree to meet these special standards, which go beyond what law, market, morality and public opinion require.

However, not all people raising money would consider that these special standards applied to them. These might include:

- volunteers who occasionally shake a bucket outside a supermarket
- paid cash collectors
- challenge eventers and fun runners
- charity shop volunteers
- volunteer community fundraisers
- database managers
- fundraising assistants and administrators
- face-to-face fundraisers who are just doing the job as a stopgap
- someone at a marketing agency doing *pro bono* work for a charity
- someone administering an *in memoriam* fund for a deceased friend or relative
- members of a development board.

⑥ *‘Only declared members of the fundraising profession can behave unprofessionally: since only members of the profession are subject to its professional standards, only they can violate them. Someone who is not a member of the fundraising profession – such as a fun runner or someone doing a sponsored challenge event – cannot behave ‘unprofessionally’ in a fundraising context.*

Any one of these could declare themselves to be members of the fundraising profession, but there is no expectation that they do so (although they would be bound by any legal and contractual requirements, such as, in the UK, having a commercial participator agreement and disclosing that they are paid agency workers). However, if they choose not to declare themselves as members of the fundraising profession, they would not be acting unprofessionally if they did not meet fundraising’s special standards (unless contractually obliged to do so). ⑥

## 5

# Is fundraising a profession under the philosophical approach?

How, then, does the Socratic definition of a profession apply to fundraising?

By using Davis's (2010, pp99-101) criteria and adapting them for fundraising (see Figure 3.2), we can see that nothing in the Socratic definition requires fundraisers to be licensed, to serve a client base, to pass through a curriculum, to set up barriers to entry to 'non-fundraisers', or any other of these supposed qualifying criteria of professionhood. What qualifies fundraising as a profession under Davis's Socratic definition is that fundraisers make a declaration to go beyond what the market, law, morality and public opinion require of them in the service of the moral ideal of...

*... ensuring that charities and other voluntary and non-profit organisations have sufficient income to carry out their core charitable purpose and improve the lives of their beneficiaries.*

Now, anyone can collect money for charity. But only professional fundraisers commit to comply with their donors' wishes, thank them promptly and appropriately, not put undue pressure on people to give, and so on. The profession of fundraising does not seek to prevent volunteer cash collectors, jobbing F2F fundraisers, administrators of in-memoriam funds, etc, from raising money for charity. But these collectors are not and cannot claim to be 'professional fundraisers' - in the sense that they are members of the fundraising profession - even if they are 'professional' fundraisers because they earn their living doing it: they are 'just' challenge eventers, or 'just' cash collectors, or 'just' someone doing F2F to earn a living, or 'just' a marketer doing *pro bono* work.

However, an advantage of the Socratic definition of a profession of fundraising is that anyone can 'profess' their membership of it, so it doesn't prevent

people entering the profession who might otherwise be lost to it. Take as an example F2F fundraisers, who endure a degree of professional prejudice from salaried charity fundraisers and even other types of third party contracted fundraisers (Lewis 2010). Take an individual 'chugger' on the streets of the UK.

Is she a member of the fundraising profession?

It's entirely her choice.

If she is - to press into service the hackneyed stereotypes - an actor 'resting' between jobs or a student working during vacations, then she might not consider herself part of a profession of fundraising at all. Of course, she is bound by the market (her contract of employment), morality (not to lie or treat people with a lack of respect) and the law (in the UK she must disclose to any new donors that her agency is paid to fundraise and how that fee is calculated<sup>17</sup>).

But having started working as a street fundraiser, she might find that she really likes it and has a real aptitude for the job. She might decide to excel at it. Rather than see it as stopgap way to earn a crust before getting a 'real' job, she might decide to make a career in charity fundraising, setting her sights on finding a job in a charity fundraising department - street fundraising is increasingly an entry route into middle management and senior fundraising jobs at charities (White 2014) - or staying in F2F and moving on to team leadership and management (ibid). One fundraiser, who began her fundraising career as a street fundraiser before becoming head of fundraising at a charity, said of her formative experience as a street fundraiser: "I learnt that if I could do this job and do it well, I could do any job." (Lewis 2010.)

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<sup>17</sup> Charities Act 2006, s67.



Are these two volunteer fundraisers members of the profession? Barbara Burnett (shown here in 2003, the year she won the volunteer fundraisers of the year award) declared her membership of the profession. Stephen Chalke, educational activist and founder of the Oasis Trust, opted to remain outside of the profession.

She might decide that she is a fundraiser and declare her membership of the fundraising profession.

Having done so, she makes a morally binding commitment never to forget to thank new donors. She would never be tempted to put any undue pressure on someone to sign up to meet her target for the week; in fact, she might actually discourage someone from signing up if it seemed to her that the person was only doing so to end the engagement and was likely to cancel the Direct Debit as soon as he got home. She would go out of her way to ensure that someone who asked for more information received it from the charity.

In making a declared commitment to achieve these special standards, she would enter membership of the fundraising profession.

This is exactly what one volunteer fundraiser did. In 2003, Barbara Burnett won the *Professional Fundraising* magazine/Institute of Fundraising volunteer fundraiser of the year award. Burnett – a mother of a young daughter with Down’s Syndrome – took on the responsibility of raising money for her daughter’s school, Greenside School in Stevenage, Hertfordshire. Through a series of events, local sponsorships and charity of the year partnerships, she raised £70,000. Then, she helped establish a new charity – the Greenside Trust – wrote the fundraising strategy and set an income target of £250,000, with the increase met by a programme of online and trust fundraising. Burnett threw her life into raising money for the Greenside Trust: “It’s taken me 43 years, but at last I feel like I’ve found my niche,” she said after winning the award. “If

someone asks me what I do, I say: I am a fundraiser.” (MacQuillin 2003b.)

Compare this with the way Steven Chalke MBE, educational activist and founder of the Oasis Trust, described his fundraising activities when he delivered the Institute of Fundraising National Convention opening plenary in July 2011. “I have raised lots of money, but I am not a fundraiser.”<sup>18</sup>

Both Barbara Burnett and Steven Chalke were volunteer fundraisers: Burnett opted into the fundraising profession by declaring her membership of it; Chalke chose not to<sup>19</sup>.

So, is fundraising a profession or is it not? I believe that, using the Socratic definition, a real case to professionhood for fundraising can be made (though I also have reservations).

But it is not up to me to decide that. To adapt Davis (2010, p100), whether fundraising is a profession by the Socratic definition rests on fundraisers’ commitment to the profession. Fundraisers do not need to join a professional organisation, sign up to a code of ethics, pass through an approved curriculum or gain an approved certificate. All a person need do, provided they are qualified to do so through training, certification or experience, is declare: “I am a fundraiser.” (Though the problems of whether the people who do ‘profess’ their membership of the fundraising profession are sufficiently qualified and knowledgeable to do so remains, and this is something that I firmly

<sup>18</sup> The account of Steven Chalke is based on notes I took at the time.

<sup>19</sup> Barbara Burnett is now both a professional (i.e. paid) fundraiser and a member of the fundraising profession.

believe must be redressed if fundraising is to professionalise.)

Making such a declaration then morally binds them to achieving the profession's special standards.

The trouble is, too many fundraisers declare: "I am not just a fundraiser." Does a solicitor say, "I'm not just a solicitor"? Does an architect say, "I'm not just an architect"?<sup>20</sup> And yet fundraisers, rather than profess what they are, so often profess what they are not. And there cannot be a profession of 'not just fundraising' (MacQuillin 2014a, 2014b).

There seems to me to be a professional schism at the heart of the collective endeavour of fundraising that sets up false dichotomies between the 'right' way to do fundraising (build relationships, don't ask for money, follow donors wishes, etc.) and the 'wrong' way to do fundraising, which is basically seen as 'transactional' and focused too much on getting a gift out of a donor (MacQuillin 2016a, p8; 2016c).

It's the argument that to be a great fundraiser, you first and foremost have to be passionate about the cause, but passion for the actual practice of fundraising is at best secondary and at worst irrelevant (Atkinson 2013). In the wider context of the charity world, it is the idea that fundraising is a 'necessary evil' (MacQuillin 2016d) - a phrase that is even used by fundraisers when they are defending what they do (Hussey 2007) - and that the knowledge that fundraisers hold is "guilty knowledge" that is used to do "dirty work" (Bloland and Tempel 2004, pp15-16).

When fundraising comes under 'attack' from - i.e. fundraisers' professional autonomy is threatened by - the media, politicians, regulators and the public, it is usually because of the way fundraisers are asking for and raising money. Yet because fundraisers cannot agree on what is at the heart of their professional practice - which is the moral ideal of...

"...ensuring that charities and other voluntary and

non-profit organisations have sufficient income to carry out their core charitable purpose and improve the lives of their beneficiaries..."

...which involves asking people for money - because research shows that people will not make donations if they are not asked (e.g. Schlegelmilch et al 1997, p558; Bryant et al 2005; Bekkers and Wiepking 2007, p23; Neumayr and Handy 2017)...

...their professional autonomy to defend and advocate what they do (ask for donations) is compromised, because many of them don't believe it themselves. 🗨️

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<sup>20</sup> This is rhetorical grandstanding - maybe solicitors and architects actually do say those things.

## 6

## Conclusion – a profession for future generations

The question we haven't yet asked is why is it even important to be a part of a profession. What's wrong with just being a good old trade, or even a craft?

Professionhood brings with it trust, legitimacy and status, in part because of all the factors that are outlined in the sociological approaches. People trust you, as a professional, to act for the public good, rather than out of self-interest. People understand that you legitimately have a better understanding than they, as lay people, do, because you have gone through the profession's formal knowledge acquisition process. They respect what you have to say, because that trust and legitimacy affords you the status to advocate, and when you do, people listen.

I do not believe that fundraising can continue the professionalisation project unless it follows to some degree a sociological approach. Some of these can be key performance indicators, such as developing new theories and frameworks for professional ethics; others can be key indicators of success, such as how much professional autonomy fundraisers feel able to exercise, and whether this is increasing.



Abraham Flexner.

**Figure 6.1: Abraham Flexner's (1915) qualifying criteria for why social work is a profession (summarised by Bowie 1991, p18).**

1. Possesses and draws upon a store of knowledge that is more than ordinarily complex
2. Secures a theoretical grasp of the phenomenon with which it deals
3. Applies its theoretical and complex knowledge to the practical solution of human and social problems
4. Strives to add to and improve its stock of knowledge
5. Pass on what it knows to novice generations, not in a haphazard fashion, but deliberately and formally
6. Establishes criteria of admission, legitimate practice and proper conduct (which Andrew O'Brien [1998, p396] describes as a "professional ethic")
7. Be imbued with an altruistic spirit.

Fundraising needs to consider the sociological approach as an aspiration rather than a strict yardstick, and the type of profession it could aspire to being was described more than a century ago by American educator and medical reformer Abraham Flexner (1915) when he asked if social work were a profession, and I will leave as an open question how fundraising fares against these criteria (See Figure 6.1).

The professionalisation of fundraising, following the sociological approach (Flexner's criteria seem to me to be a hybrid of sociological and philosophical approaches), has to be seen as an ongoing 'project' that will require continuous work (Bloland and Tempel 2004, pp13-14). But we can't wait for that to happen, because the professionalisation project might never be truly completed. In the meantime, the fundraising profession needs to reclaim its professional autonomy, and that starts with having a voice, a voice that fundraisers are proud of and confident in. It is an interesting counter-factual question to imagine what British fundraisers might have done differently in response to the fundraising crisis that was precipitated by Olive Cooke's suicide in May 2015, and what they might have done



*‘Do fundraisers want to bequeath to their successors 40 or so years from now a full-fledged profession that is trusted, and has status and legitimacy, the key to which is acquiring a standard canon of practical and theoretical knowledge?’*

differently that might have prevented it, had they been able to speak up with a greater and more confident sense of professional autonomy.

But more importantly, fundraising as a collective endeavour needs to ensure what happened in the summer of 2015 doesn't happen again in 2035 or 2055.

This brings us back to Flexner's fifth point about passing on knowledge to novice generations. It's the responsibility of today's fundraisers to equip their successors with the tools they need to be most professional.

We've already encountered the figures that indicate the proportion of fundraisers that have professional qualifications and/or studied fundraising through higher education (around 40 per cent in both the USA and UK), along with the figure that 55 per cent of American fundraisers say they are self-taught (Nathan 2017).

There is also the question of how fundraisers come to be fundraisers. In the USA in the mid-90s, 85 per cent of the fundraisers taking part in Duronio and Tempel's study (1997, p84) had jobs outside of fundraising before they became fundraisers, reporting that most fundraisers said they had got into fundraising "by accident" (ibid). While Sarah Nathan hasn't yet analysed comparable data for the 2015 update, we can glean a contemporary similar picture for the UK.

Beth Breeze's current research (2017, p70) shows that 44 per cent of paid British fundraisers "fell into fundraising by accident", while 42 per cent "came into [fundraising] gradually through related professional and volunteering roles". Just 5.5 per cent "always wanted to work as a paid fundraiser".

Those fundraisers who 'fell into fundraising by accident' in the mid-90s are today's fundraising directors and leaders. Those fundraisers who are still 'falling into fundraising by accident' in the mid-2010s will be the fundraising directors and leaders in the mid-2030s. The question fundraisers need to ask themselves is do they want those coming into fundraising in the mid-2030s, those fundraisers who will be the directors and leaders in the mid-2050s, still to be in those positions 'by accident'. Or do they want to bequeath to their successors 40 or so years from now a fully-fledged profession that is trusted and has status and legitimacy, the key to which is acquiring a standard canon of practical and theoretical knowledge?

Fundraising needs to reinvigorate its professionalisation project, and that has to come from the bottom up. It has to be a grassroots movement and not a top down sociological approach that sets qualifying criteria. It starts with fundraisers who will put their hands up to proudly declare "I am a fundraiser" – just as Barbara Burnett did – rather than "I am not just a fundraiser", as many now do. And having made that declaration, having professed membership of the fundraising profession, speak up on its behalf.

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# Next steps

This green paper will be used as the basis for a task group of Rogare's International Advisory Panel to explore issues raised. The purpose of this task groups is to:

1. Identify the issues affected by fundraising's perceived lack of professional status
2. Identify how these issues, challenges and problems would be solved were fundraising to professionalise
3. Recommend whether fundraising needs to professionalise
4. Recommend what fundraising needs to do in order to professionalise.

As a starting point, the group will first consider:

- Whether the Green Paper is comprehensive (does it raise the major/majority issues that need to be addressed)?
- Does the Green Paper clearly identify the issues that are faced by the community (internally and externally)?
- Are there any further knowledge gaps that can be identified for inclusion in future editions of the Green Paper?

The task group is co-ordinated by Cherian Koshy, director of development, Des Moines Performing Arts (USA), and comprises (with more names to be added):

Kyla Amrhein - University of Alberta (Canada)

Ashley Belanger - Rhode Island Urban Defence

League (USA) Simona Biancu - ENGAGEDin (Italy)

Jennifer Brake - St Louis Public Radio (USA)

T. Clay Buck - Smith Center for the Performing Arts (USA)

Paula Dixon - Hazon Consulting (UK)

Lianne Howard-Dace - ChristianAid (UK)

Barbara O'Reilly - Windmill Hill Consulting (USA)

Valerie Pletcher - Brady Campaign (USA)

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