

CFRE Roadmap: Post Conference

Dr. Kristen Bennett, CFRE



Kristen Bennett has over 21 years of professional fundraising experience. She currently serves as Vice President of Institutional Advancement Trinity Valley Community College and serves as the Executive Director for its foundation. Prior to TVCC she served as Vice President for Advancement at St. Catharine College, Director of Development at Eastern Kentucky University, Development Officer at Lexington Public Library/Foundation, Director of Development/Grant Writer at Habitat for Humanity and Major/Planned Gifts Officer at Christian Appalachian Project.

Kristen earned her doctorate degree in 2017 in Educational Leadership and Policy Studies at Eastern Kentucky University, earned a Master's in Business Administration at Midway University in 2012 and earned a Bachelor of Science in Communication and Information Studies from the University of Kentucky in 2005. She is a CFRE and is certified in fundraising management (CFRM) and nonprofit leadership (CNLE) through the Indiana University-Lily School of Philanthropy (IUPUI).

Nicole Robinson Gauthier, CFRE



Nicole Robinson Gauthier serves as the Executive Director of Lone Star College Foundation, supporting all six campuses of the largest college in Texas. The Foundation partners with corporations, community organizations, foundations, and individuals in raising funds for student scholarships and programs. Through the management of more than \$26 million in assets, along with special events and relationship building, Nicole ensures that nearly \$2 million in scholarships and program funds are awarded each year.

While previously at the Broward Performing Arts Foundation in Fort Lauderdale, Florida, Nicole helped to found the Ghost Light Society, the first young professionals group associated with the Broward Center for the Performing Arts. Today it is one of the most active and visible groups that is driving the next generation of leaders and donors to support performing arts in Broward County. After working with the Women's Leadership Council at three United Ways, Nicole helped Montgomery County United Way in The Woodlands create Women Who Rock. This annual event celebrated its 5th anniversary of gathering women in support of higher education for young mothers. The scholarships fund childcare and both the event and the scholarship are unlike any other in the region.

CFRE Roadmap

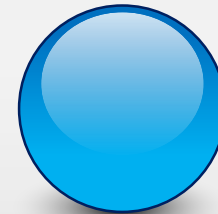
Commit
"TIME"
to
earning
CFRE

Get
approval-
using
CFRE why
templates
/allocate
budget

Study CFRE
Resources,
Join Study
Groups,
Attend
TACCF
Trainings/
Workshops
**6-12
months**

Take
practice
test &
Study
more if
needed

Speak with
other CFRE
for
encourage-
ment &
Take the
test
If you fail,
TRY AGAIN



Questions?



CFRE International

Certifying fundraising executives
Setting standards in philanthropy

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www.cfre.org

Becoming a CFRE®

*Why Becoming a Certified Fund
Raising Executive (CFRE) Should
Be Your Next Personal and
Professional Goal*

Everything You Wanted To Know

- What is certification?
- Certification vs. certificate
- CFRE International: who we are
- Elements of a profession
- What distinguishes CFRE?
- Why pursue professional certification?
- Certification process
- CFRE examination
- How do I study?
- Timeline after the exam
- Recertification
- CFRE programme statistics

What is Certification?

- ***Certification*** - a voluntary process to recognise *individuals* for meeting standards set by a third party
- ***Accreditation*** - a voluntary process to recognise *institutions or organisations* for meeting standards set by a third party
- ***Licensure*** - a mandatory governmental requirement necessary for *individuals* to practice in a particular profession

What is Certification?

- Certification assures the public that an individual demonstrates specific knowledge required of a practitioner at a certain level.
 - *Academic degrees and educational certificates do not certify demonstrated knowledge of professional practitioners.*

Certification vs. Certificate

- Results from an assessment process
 - For individuals
 - Typically requires professional experience
 - Indicates mastery of knowledge usually assessed through an exam
 - Awarded by third-party, standard-setting organisation
- Results from an educational process
 - For individuals
 - For newcomers and experienced professionals
 - Indicates completion of a course or series of courses with a specific focus
 - Awarded by educational programmes or institutions

Certification vs. Certificate

- Standards set by a thorough, defensible, industry-wide process resulting in outline of required knowledge or skills
 - Typically results in a designation to use after one's name (CFRE, CFP, APRA)
 - Has on-going requirements in order to maintain; holder must continue to demonstrate he/she meets requirements
- Course content set a variety of ways (dean, faculty, instructor)
 - Usually listed on a resume detailing education; may issue a document to hang on the wall
 - Is the end result; demonstrates knowledge of course content at the end of a set period in time



“ Honestly, having the CFRE certification is like a golden ticket when sending out resumes.”

Timothy J. Morrison, CFRE
Naples, FL
United States

CFRE International: Who We Are

- CFRE International is an independent, internationally recognized certifying body for the fundraising profession.
- An *independent* agency *endorsed by* leading philanthropic associations and members of the public *setting standards in philanthropy*
- CFRE International was created by AHP and AFP as a separate but affiliated organization
 - Ensures credibility of the exam and designation:
 - *Separation of the educational bodies (AFP and AHP) from the credentialing body (CFRE International).*

CFRE International: Who We Are

- Vision:
 - A world where philanthropy is practiced in an environment of trust, respect and accountability.
- Mission:
 - CFRE International certifies experienced fundraising professionals aspiring to the highest standards of ethics, competence and service to the philanthropic sector.

CFRE International: Who We Are

- Governed by currently certified fundraising professionals elected by the certificant population
- The only internationally recognised baseline credential for fundraising professionals
- CFRE works with participating, leading philanthropic organizations
 - Participating Organisation members receive 20% discount on CFRE certification fees
- Accredited by the National Commission for Certifying Agencies (NCCA)
- More than 6,000 CFRE certificants worldwide

Who Are the Participating Organisations?

- Across North America:
 - Association for Healthcare Philanthropy (AHP)
 - Association of Fundraising Professionals (AFP)
 - Association of Lutheran Development Executives (ALDE)
 - Association of Philanthropic Counsel (APC)
 - Boy Scouts of America (BSA)
 - Canadian Association of Gift Planners (CAGP)
 - The Giving Institute (*formerly AAFRC*)
 - International Catholic Stewardship Council (ICSC)
 - National Association of Cancer Center Development Officers (NACCDO)
 - North American YMCA Development Organisation (NAYDO)
 - National Catholic Development Conference (NCDC)
 - New England Association for Healthcare Philanthropy (NEAHP)
 - Partnership for Philanthropic Planning (PPP)
 - United Way Worldwide (UWW)

Who Are the Participating Organisations?

- In Australasia:
 - Educate Plus (*formerly* ADAPE)
 - Fundraising Institute - Australia (FIA)
 - Fundraising Institute of New Zealand (FINZ)
- In Brazil:
 - Brazilian Fundraisers Association (ABCR)
- In Europe:
 - Association of Fundraising Consultants (AFC)
 - European Fundraising Association (EFA)
- In Japan
 - Japan Fundraising Association (JFRA)
- In Kenya
 - Kenya Association of Fundraising Professionals (KAFP)

Elements of a Profession

- Most professions possess the following attributes:
 - Recognised body of knowledge
 - Continuing education for professionals
 - Code of ethics
 - Research studying the profession
 - Certification for practitioners in the profession

Recognised Body of Knowledge

- Based on a *job analysis*
- International study of fundraising practice conducted every 5-7 years
- Survey covering all fundraising duties and knowledge areas which might be required to be a fundraiser. Respondents are asked:
 - *which fundraising tasks they perform;*
 - *how frequently they perform them; and*
 - *how critical those tasks and knowledge areas are to fundraising.*
- Result is the Core Body of Knowledge required to be an effective fundraising professional

Other Hallmarks of a Profession

- Continuing education for professionals (offered by Participating Organisations, colleges and universities)
- Code of ethics (offered by Participating Organisations)
- Research studying the profession
 - *Conducted by any number of professional associations to their members*
- Certification of professionals – provided by CFRE International

What Distinguishes CFRE?

- Certification Requires:
 - Professional Fundraising Experience
 - Documented Continuing Education
 - Demonstrated Fundraising Performance
 - Passing the CFRE Board Certification Examination
- CFRE certificants and candidates adhere to the *International Statement of Ethical Principles in Fundraising*, *Donor Bill of Rights*, and CFRE International's *Accountability Standards*

CFRE Certificants Have Fundraising Experience

- A CFRE has a minimum of three years of paid, professional experience as a member of a philanthropic fundraising staff or as a consultant to nonprofit organisations, bringing a significant knowledge base to any position.
 - *The CFRE exam tests candidate knowledge at the 5-year level of professional experience.*

CFRE Certificants Remain Current with Trends and Best Practices

- CFRE certified professionals are required to continue to obtain current professional education, explore new knowledge in specific content areas, master new fundraising related skills and techniques, and conduct professional practice in an ethical and appropriate manner.

CFRE Certificants Have a Proven Track Record

- A CFRE has a track record of performance with communications projects, management assignments, and/or front line fundraising experience with outcomes that directly impact the development function of their organisation. A CFRE must continue to demonstrate this throughout their certification.

CFRE Certificants Have Passed an Accredited Board Certification Exam

- By achieving a passing score on the CFRE Global Exam a CFRE has demonstrated their mastery of the body of knowledge required to perform fundraising tasks based on current fundraising best practices.
- The CFRE exam tests what are commonly accepted as best practices around those tasks, identified through the job analysis, that fundraising professionals perform on the job.

Why Pursue Professional Certification?

- **Credibility.** CFRE certification serves as an impartial, third party endorsement of your knowledge and experience against international standards in philanthropy. It adds to your credibility as a fundraiser and sets you apart from other professionals.
 - *81% of CFRE certified fundraisers report that their CFRE credential has enhanced their credibility with employers and clients*

Why Pursue Professional Certification?

- **Achievement.** CFRE certification is a reflection of personal achievement because the individual has displayed mastery of his or her field by meeting requirements and standards set in philanthropic fundraising.
 - *95% of CFRE certificants report that the sense of personal achievement provided by CFRE certification has been valuable to their career.*



“ My CFRE demonstrates my professional achievement and supports the growth of fundraising as a trusted profession. ”

Lesley Ray, MBus, CFRE, FFIA
2015 Arthur Venn Fundraiser of the Year
South Brisbane, QLD
Australia

Why Pursue Professional Certification?

- **Commitment.** Achieving CFRE certification shows your peers, supervisors and, in turn, donors your commitment to your chosen profession and your ability to perform to set standards. The CFRE certification programme seeks to grow, promote and develop certified professionals, who can stand “out in front” as role models for the fundraising profession.

Why Pursue Professional Certification?

- **Advancement.** CFRE certification can give you the “edge” when being considered for a promotion or other career opportunities. The CFRE identifies you as an employee who has demonstrated mastery of fundraising principles and techniques based on accepted best practices.
 - *70% of CFRE certified fundraisers report enhanced professional (job) opportunities as a result of their CFRE certification*



“I believe the CFRE credential has allowed me to rise above the competition, and I am extremely grateful for it.”

Karen J. Harvey, CFRE
Beaver, WV
United States



“For years I had heard of salary increases and promotion due to certification. My CFRE designation quickly conveyed those benefits — along with credibility and respect among those in our industry.”

Marilyn Hattaway, CFRE
Casselberry, FL
United States

Why Pursue Professional Certification?

- **Recognition.** As a CFRE certificant, you can expect increased recognition from your peers for taking that extra step in your professional career.
 - *82% of CFRE certificants report enhanced recognition among colleagues as having a valuable impact on their career.*
- **Personal Satisfaction.** CFRE certification is a step toward defining your professionalism beyond a job description or academic degree while gaining a sense of personal satisfaction.

Why Pursue Professional Certification?

- **Responsibility. Knowledge. Skills.**
 - CFRE certification indicates your willingness to invest in your own professional development.
 - CFRE certification showcases your individual mastery by confirming proficiency and knowledge in the field.
 - Recertification is required every three years, proving you stay ahead of the curve in fundraising.

Why the CFRE?

- In the U.S., CFRE certificants report earnings of \$30,000 more than their non-certified colleagues
- In Canada, CFRE certificants report earnings of \$16,000 more than their non-certified colleagues

**statistics courtesy of the 2015 Compensation and Benefits Study conducted by the Association of Fundraising Professionals (AFP)*

Certification Process

- **Application** - a written application with a point-system to demonstrate your experience – *completed online*
- **Examination** - a standardised, multiple-choice exam of 200 questions
- **Accountability Standards** - promoting integrity, ethical behavior, the *Donor Bill of Rights* and *International Statement of Ethical Principles in Fundraising*
- **Recertification** - reassessment required every three years to maintain CFRE certification

Application Eligibility Requirements

- **Education:** Continuing education courses in related areas and service learning through volunteer experience
- **Professional Practice:** Three (3) years of experience as a professional fundraising staff member or a fundraising consultant
- **Professional Performance:** Demonstrated professional achievement
- **Agree to uphold:** the *Donor Bill of Rights*, *International Statement of Ethical Principles in Fundraising* and the CFRE *International Accountability Standards*

Education Requirements

- **80 points required** (1 hour = 1 point)
 - Document educational degrees awarded
 - Document participation in conferences, workshops, or seminars related to fundraising, not-for-profit management, marketing, or other related topics OR
 - Teaching courses on the above topics OR
 - Authoring articles or books
 - Service learning through volunteer experiences (up to 10 points)
- Points must be earned within past 5 years

Professional Practice Requirements

- **36 points required** (1 month = 1 point)
 - *Must document three (3) years of full-time, paid professional experience in fundraising during the past five (5) years*
- At least 50% of duties must be directly related to fundraising – this can include research and grant proposal writing
- Half-time employment will qualify if 100% of duties are directly related to fundraising

Professional Performance Requirements

- **55 points required** through documentation of:
 - Management Projects - 5 points per project
 - *Examples: board development, feasibility study, strategic planning*
 - Communications Projects - 5 points per project
 - *Examples: newsletter development, public relations*
 - Actual funds raised - 1 point = equivalent raised in local currency of USD 25,000
 - Must have been during the past 5 years

The Online Application

- Go to www.cfre.org, click on “My CFRE”, and use your email and a password of your choosing to create a secure, online account.
- Enter your data as you go through each section of the application form. The system allows you to log in and out of the form, saving information as you go.
 - *Retain backup copies of educational programme materials in case your application is randomly selected for audit.*
- The application calculates your points as you enter your data in each section and turns green when the points requirements have been met.
- When you are ready to submit your application for review; select your desired exam testing window and submit your application and fee online to CFRE International.
 - *Creating an online account and filling out the application is free. You pay application and testing fees only when you submit your application for review and approval to write the CFRE exam.*

Certification Timeline

Each candidate for CFRE certification is unique and there is wide variation in the length of time candidates require to complete the certification process outlined below.

1. Online CFRE application is completed and submitted with payment for review and Authorization to Test.
2. Receive **Authorization to Test** approval to schedule your exam at a Pearson VUE test centre –OR- receive request for **additional information**.
3. Upon receipt of Authorization to Test, make personal testing reservation with your selected testing centre.
4. Write the CFRE exam at a convenient computer-based testing center of your choosing.
5. Receive exam results and score report upon completion the exam.
6. Receive follow up from CFRE International on next steps.

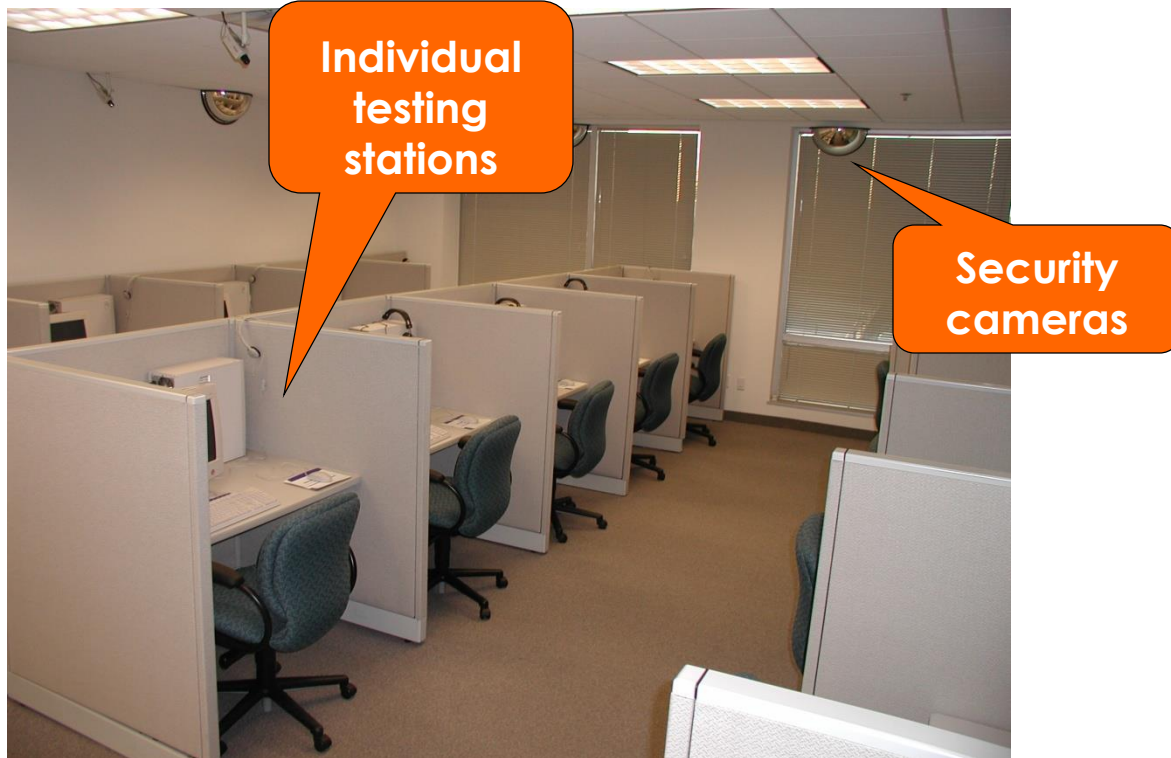
Computer-Based Testing

- Candidates take the CFRE exam on a computer in a proctored testing centre at a set appointment time of the candidate's choosing.
 - Testing on one's own computer is not possible.
- CFRE exam is available during four “testing windows” each year. Testing windows are published on the CFRE International website at www.cfre.org under **Exam Dates and Fees**.
- Pearson VUE, CFRE International's testing partner, offers a network of over 2000 testing centres locations across 180 countries around the globe.
- Candidates will still need to submit their CFRE application to CFRE International and receive Authorization to Test **before** making their personal testing reservation.
 - *Authorization to Test is valid for 12 months from date granted.*

Computer-Based Testing

- Candidates will be able to take a tutorial on-site at the testing centre to familiarise themselves with the computer screen and process.
 - *This tutorial time will not cut into the timed portion of the exam.*
- Candidates will receive their exam results and score report with a breakdown by knowledge domain before leaving the testing centre.

A Look at a CBT Center



CFRE Examination

- 200 multiple-choice questions (25 of which are *pre-test* items and do not affect your score)
- Developed by current, certified fundraising professionals in the field in conjunction with a professional testing agency
- The exam is global and is the same no matter where in the world you test.

CFRE Exam Content

- Current and Prospective Donor Research
(28 items – 14%)
- Securing the Gift (46 items - 23%)
- Relationship Building (52 items - 26%)
- Volunteer Involvement (16 items – 8%)
- Leadership and Management (38 items - 19%)
- Ethics, Accountability and Professionalism
(20 items – 10%)

How CFRE Exam is Developed

- Core Body of Knowledge identified through detailed international survey called a *job analysis*
- Results of survey directly determine content of exam
- CFRE certificants write new exam questions based on current practice and literature
- Exam reviewed by professional testing agency and new questions pre-tested through current candidates

How CFRE Exam is Developed

- Only those task and knowledge statements that a majority of respondents from all countries indicated they performed are tested on the exam.
- The exam is global and focuses on fundamental knowledge needed for fundraising success no matter where in the world one practices as a fundraising professional.
- Exam questions are developed by currently practicing professionals.

How Do I Study?

- This baseline, generalist exam assesses your mastery of tasks performed on the job by fundraisers and the knowledge needed to carry out those tasks - not a prescribed set of texts (*such as are used to in academic settings*).
- What YOU need to study may not be the same as what your colleague in the office next door needs to study.
- Honestly evaluate YOUR strengths and weakness.

How Do I Study?

- **Review the Test Content Outline** and compare your professional experience to what is covered.
 - *Identify your personal areas of strengths and weakness.*
- **Review** texts or portions of texts from the **CFRE Resource Reading List** that cover weaker areas.
 - *Form informal study groups with your colleagues.*

Regarding Prep / Review Courses

- International standards for the operation of certification programmes prohibit the organisation that administers the exam from **also** preparing candidates for the exam.
 - *As a result, CFRE International does not sponsor or endorse any courses to prepare candidates for the CFRE exam.*
- **Any** educational programmes will help support your overall knowledge base, thus helping you prepare for an exam.
- Candidates should not expect a course to “teach to the exam” and tell you how to answer questions on the exam.
- Each candidate’s study plan should be as unique as that candidate’s own experiences.

Timeline After the Exam

- At testing centers, candidates receive an immediate Pass/Fail determination and score report with a breakdown by knowledge domain.
- Upon official notice to CFRE International of candidate test results by the testing agency partner:
 - *Successful candidates* receive email notification of award of CFRE certification and may begin using CFRE credential
 - *Unsuccessful candidates* receive information on retaking the exam
- 15 days after the end of the testing window all successful candidates receive official certificate from CFRE International by mail.

Recertification

- Certified Fund Raising Executive (CFRE) is conferred for three (3) years
 - *candidates for recertification are sent notice of the deadline and process for recertification beginning four months prior to the certification expiration date*
- Must complete recertification application online
 - *very similar to initial CFRE application*
- Must apply for and be granted recertification in order to continue using the CFRE credential
- No exam is required for recertification

CFRE Programme Information

- Apply on-line at: www.cfre.org
- Don't hesitate to call or email with questions to:
+1.703.820.5555 succeed@cfre.org



“ The best reason to get certified is the knowledge that as you attain a definable level of competence and knowledge, you’ll be better equipped to support the organization you represent.”

R. Daniel Shephard, CFRE
Principal, The Shephard Group LLC
United States



Test Content Outline for CFRE Exam

Domain 1: Current and Prospective Donor Research (14% – 28 items)

Tasks

1.1 Develop a list of prospective donors by identifying individuals, groups, and entities, such as foundations, corporations, and government agencies, with the linkage, ability, and interest to give in order to qualify prospective donors for further research and cultivation.

1.2 Implement and utilize a secure data management system to ensure data privacy, store information on current and prospective donors, and enable segmented retrieval and analysis.

1.3 Collect and analyze current and prospective donor information including demographics, psycho-graphics, interests, values, motivations, culture, ability, giving and volunteer history, relationships, and linkages to select potential donors for particular projects and fundraising programs.

1.4 Rate current and prospective donors on linkage, ability, and interest to prioritize and plan cultivation and solicitation.

1.5 Communicate and validate relevant donor information with key organizational stakeholders to establish a plan of action for engagement, cultivation, solicitation, and stewardship.

Key Knowledge Areas for Above Tasks

- Indicators that identify trends and define characteristics such as the socioeconomic status, giving history, generation, gender, and culture of a constituency
- Donor acquisition and retention principles
- Sources of financial support such as individuals, corporations, grant-making bodies, foundations, governmental agencies, and gaming
- Types of information needed to identify prospective donors and determine specific fundraising strategies
- Donor profile components
- Indicators of the donor's ability to give, linkage, and interest
- Donor giving patterns such as recency, frequency, renewal rates, and value
- Data analysis techniques such as statistical analysis, data mining, and segmentation
- Data gathering techniques such as surveys, focus groups, interviews, and social networking
- Elements of a comprehensive data management system including data capture, storage, retrieval, maintenance, and security

- Prospective donor screening, qualifying, and rating methods
- Motivations, practices, and policies of various funding sources
- Prospective donor information sources such as people, written or published sources, and electronic or online sources, and their uses and limitations
- Elements or components of a fundraising program, including annual giving, capital/major giving, and planned giving/legacies
- Relationships between and among annual giving, capital/major giving, and planned giving/legacies programs
- Market research components and uses
- Privacy legislation and regulation
- Ethical use of data
- Elements of engagement, cultivation, solicitation, and stewardship plans

Domain 2: Securing the Gift (23% – 46 items)

Tasks

2.1 Develop a case for support by involving stakeholders in order to communicate the rationale for supporting the organization’s mission.

2.2 Identify solicitation strategies and techniques appropriate to current and prospective donor groups.

2.3 Develop and implement specific solicitation plans for the involvement of individual donors, donor groups, and/or entities.

2.4 Prepare donor-focused solicitation communications in order to facilitate informed gift decisions.

2.5 Ask for and secure gifts from current and prospective donors in order to generate

financial support for the organization’s mission.

Key Knowledge Areas for the Above Tasks

- Psychology of giving
- Sociological and cultural influences on giving
- Elements of an effective case
- Case statement construction
- Elements of an effective solicitation plan
- Types of gifts such as cash, securities, trusts, property, and gifts in kind
- Solicitation strategies and their effectiveness with different donor groups
- Components and uses of feasibility/planning studies
- Negotiation techniques
- External factors that may affect the viability of the organization and its programs and services
- Donor motivations, barriers to giving, and giving behavior
- Peer relationship principles and their application to fundraising
- Fundraising program evaluation standards, procedures, and methods including benchmark calculations such as cost of fundraising, ROI, fundraising metrics, average gift, and response rates
- Gift agreements and payment structures for contributions such as outright gifts, pledges, and installments
- Communication methods and messages to reach target audiences
- The use of prospect research to inform cultivation and solicitation strategies
- Fundraising techniques and programs such as:

- a. Direct marketing (for example, mail, telephone, electronic, direct response television [drtv], direct dialogue)
- b. Special events (for example, dinners, walk-a-thons, tournaments, auctions)
- c. Grant proposal writing (for example, foundations, corporations, government)
- d. Corporate sponsorships, partnerships, and cause-related marketing
- e. Gift planning such as bequests, legacies, and trusts
- f. Major gifts
- g. Memorial and tribute gifts
- h. Capital and endowment campaigns
- i. Membership and alumni programs
- j. Gaming and lottery programs
- k. Workforce and payroll giving/federated campaigns
- l. Community, peer-to-peer, and third-party fundraising
- Involvement of donor advisors, consultants, and legal and financial experts
- Use of electronic media, such as web sites, email, text messages, and social media

Domain 3: Relationship Building
(26% – 52 items)

Tasks

3.1 Initiate and strengthen relationships with constituents through systematic cultivation and stewardship plans designed to build trust in, and long-term commitment to, the organization.

3.2 Develop and implement a comprehensive communications plan to inform constituents about the organization’s mission, vision, values, financial and ethical practices, funding priorities, and gift opportunities.

3.3 Promote a culture of philanthropy by broadening constituents’ understanding of the value of giving.

3.4 Acknowledge and recognize donor gifts and engagement in ways that are meaningful to donors and appropriate to the mission and values of the organization.

Key Knowledge Areas for the Above Tasks

- Elements of a cultivation plan
- Components of a comprehensive communications plan
- Donor acquisition and renewal strategies
- Communication methods and messages to reach target audiences
- Oral and written communication techniques
- Components and uses of active listening
- Aspects of nonverbal communication such as body language and eye contact
- Interpersonal communication (for example, trust building, team building,)
- External spheres of influence such as corporate, governmental, social, civic, professional, and religious affiliations and their interrelationships
- Methods for optimizing relationships between and among constituencies
- Relationship between philanthropy and fundraising
- Benefits of fundraising programs for organizations

- Using incentives such as member benefits, special invitations, premiums, and naming rights
- Stewardship techniques such as recognition and impact reporting
- Use of electronic media in relationship building
- Definition of a culture of philanthropy

Domain 4: Volunteer Involvement **(8% – 16 items)**

Tasks

4.1 Identify organizational readiness and opportunities to engage volunteers.

4.2 Create structured processes for the identification, recruitment, orientation, training, evaluation, recognition, retention, and succession of volunteers.

4.3 Develop specific role descriptions and terms of commitment to empower and support volunteers and enhance their effectiveness.

4.4 Engage various types of volunteers (for example, board, program, campaign) in the fundraising process to increase organizational capacity.

4.5 Participate in recruiting experienced and diverse leadership on boards and/or committees to ensure these groups are representative of, and responsive to, the communities served.

Key Knowledge Areas for the Above Tasks

- Personality types and attributes
- Volunteer roles in fundraising
- Components and uses of volunteer role descriptions and term commitments
- Skills training and competency development methods

- Strategies for optimizing volunteers' time and talent
- Volunteer recruitment, orientation, training, management, motivation, retention, recognition, and evaluation techniques
- Governance principles and models for not-for-profit organizations
- Value of diversity and community representation
- Respective roles of volunteer board members and staff with respect to governance and management
- Trends and preferences in volunteering
- Organization's structure, functions, and culture

Domain 5: Leadership and Management **(19% – 38 items)**

Tasks

5.1 Demonstrate leadership that advances fundraising practice.

5.2 Advocate for and support a culture of philanthropy and the advancement of fundraising across the organization and its constituencies.

5.3 Ensure that sound administrative and management policies and procedures are in place to support fundraising functions.

5.4 Participate in the organization's strategic planning process to ensure the integration of fundraising and philanthropy.

5.5 Design and implement short- and long-term fundraising plans and budgets to support the organization's strategic goals.

5.6 Employ marketing and public relations principles and tools to support and grow fundraising programs.

5.7 Conduct ongoing performance measurement and analysis of fundraising programs using accepted and appropriate standards and metrics in order to identify opportunities, resolve problems, and inform future planning.

5.8 Recruit, train, and support staff by providing professional development opportunities and applying human resource principles to foster professionalism and a productive, team-oriented work environment.

5.9 Utilize external services as needed to optimize the efforts of the fundraising function.

Key Knowledge Areas for Above Tasks

- Components and uses of mission, vision, and values statements
- Strategic and action planning methods
- Fundraising program evaluation standards, procedures, and methods
- Policy and procedure development and evaluation
- Elements of a fundraising plan
- Role of fundraising in the strategic planning process
- Impact of organizational structures and team dynamics on the effectiveness of fundraising programs
- Methods for ensuring the integrity of data management and record-keeping systems
- Components and uses of development audits
- Financial management including budgeting, financial statements, and audits
- Use and application of market research
- Marketing and public relations principles

- Methods for assessing the organization's impact on the community
- Training resources appropriate to the different fundraising program elements
- Human resource management principles, strategies, and practices
- Fundraising roles, job design, and structure
- Culture and definition of philanthropy
- Tools to assess the need for contracted services or other resources
- Techniques for selecting, evaluating, and managing contracted services
- Principles of managing meetings
- Methods and strategies for managing change
- Principles of effective leadership
- Sources of historical and contemporary information about philanthropy and fundraising
- Concepts of organizational development

Domain 6: Ethics, Accountability, and Professionalism (10% – 20 items)

Tasks

6.1 Ensure that all fundraising activities and policies comply with ethical principles and legal standards and reflect the values of the organization and the community.

6.2 Communicate principles of ethical fundraising to stakeholders to promote ethical practices and strengthen a culture of philanthropy.

6.3 Promote ethical fundraising as a crucial component of philanthropy to strengthen the non-profit sector and support the sector's role as a pillar of civil society.

6.4 Clarify, implement, monitor, and honor donors' intent and instructions regarding the use of gifts.

6.5 Ensure that allocations of donations are accurately documented in the organization's records.

6.6 Report to constituents the sources, uses, impact, and management of donations to demonstrate transparency and enhance public trust in the organization.

6.7 Participate as an active and contributing member of the fundraising profession through activities such as mentoring, continuing education, research, and membership in professional associations.

- Personal privacy and information protection
- Ethical principles relevant to cultivating, securing, and accepting gifts
- Methods and processes for ethical decision making
- Continuing professional development opportunities in fundraising such as professional organization membership, mentorship, research, committee involvement, and sources of continuing education
- Mentorship principles
- Professional organizations' roles and resources to support advocacy
- Appropriate avenues for advocacy

Key Knowledge Areas for the Above Tasks

- Laws and regulations affecting not-for-profit organizations, including interactions with stakeholders such as donors, staff, and volunteers
- Legal and ethical practices related to donor record maintenance, gift accounting, financial management and audit trails
- Methods of recording, receipting, recognizing, and acknowledging gifts
- Elements of gift acceptance policies
- Elements of gift agreements
- Accounting and investment principles for not-for-profit organizations
- Organizational transparency, including methods for reporting fundraising performance, outcomes, and impact to constituencies
- Donor Bill of Rights/Donors' Charter and International Statement of Ethical Principles in Fundraising

Effective January 1, 2016

CONQUERING THE CFRE EXAM

...TIPS AND TRICKS: preparing for...*and passing!*... the CFRE exam

The CFRE exam is a generalist exam designed to test the knowledge and skills you use on the job on a daily basis. It is designed to test mastery of knowledge of best practices and how to apply them. It is not an “information recall” test, which is the type of test we are used to from school. Because the exam is testing “practice,” there is not a single study source. The CFRE Test Content Outline and Resource Reading List is posted on the CFRE International website. It is not expected that candidates read all the texts on the list, nor is it an exhaustive list.

You’ve decided to take the plunge...congratulations! Listed below are some supportive suggestions you may find helpful in preparing for and passing the CFRE exam.

- Visit the CFRE International website (www.cfre.org)
The CFRE Test Content Outline and Resource Reading List is posted on the CFRE International website. It is not expected that candidates read all the texts on the list, nor is it an exhaustive list.
- Enroll in a CFRE Review Course near you – many AFP Chapters offer the CFRE Review Course on an annual basis.
- Ask a colleague/peer who is CFRE certified to serve as a mentor and assist you in studying for/preparing for the exam.
- Purchase the AFP CFRE Review Course book and study it from end to end.
- Purchase the CFRE Exam Secrets Student Guide/Test Review (about \$40).
- When answering the exam questions...be Donor Centered; respond to the questions from the perspective of the donor. Also think in terms of universal best practices, rather than what might be best for your specific fundraising shop.
- Subscribe to the CFRE practice test (www.cfre.org/practice-exam).
You can subscribe for 30 days for \$60 or for 90 days for \$100. You can take and retake these practice tests to help understand the way that the questions are asked and identify areas you need to study
- Check out CFRE sample test questions (<https://www.testprepreview.com/cfre.htm>) or on Quizlet.
- Believe in and trust your experience and capability! Self-confidence goes a long way!

Sources of Information for Prospective CFRE Candidates

From the CFRE website

<http://www.cfre.org/apply/exam-preparation/>

<http://www.cfre.org/apply/exam-preparation/test-review-information/>

<http://www.cfre.org/apply/exam-preparation/exam-procedures/>

<http://www.cfre.org/apply/exam-preparation/resource-reading-list/>

<http://www.cfre.org/apply/exam-preparation/review-courses/>

Study Groups

<http://www.cfre.org/practice-exam/>

You Tube Videos

<https://www.youtube.com/watch?v=0mRivGaU8vA>

<https://www.youtube.com/watch?v=srTowl0z4RA>

Test Prep

<https://www.testprepreview.com/cfre.htm>

https://www.adrp.net/assets/Webinars/2012/Presentations/032012_adrp_webinar_presentation.pdf

<https://www.philanthropy.com/article/A-Sampling-of-Questions-From/183497>

<https://www.amazon.com/CFRE-Exam-Secrets-Study-Guide-ebook/dp/B0057ZELVM>

<https://www.flashcardsecrets.com/cfre/?gclid=EAlaIqObChMllzr89yj3AIVCzxpCh2TKgfVEAMYASAAEgIf0vD>

BwE

<https://www.afpnet.org/Professional/ProgramDetail.cfm?itemnumber=3303>

<https://cfrestudygrouptoronto2012.files.wordpress.com/2012/06/2012-kick-start-kit-final.pdf>

Blogs/websites

<https://www.linkedin.com/pulse/cfre-exam-jessica-cloud-cfre/>

<https://sarahwmackey.com/2012/03/08/a-fundraisers-ultimate-test/>

<https://developmentconsultingsolutions.com/begin-preparing-certified-fund-raising-executive-cfre-application-exam/>

<https://www.nonprofitpro.com/article/cfre-international-now-offers-practice-exam/>

<http://nonprofitteacher.com/top-20-tips-preparing-cfre-exam/>

<http://www.goodworksco.ca/what-i-learned-studying-for-my-cfre/>

<http://www.cfre.org/apply/testimonials/>

https://twitter.com/CFRE_INTL

<https://myforefront.org/news/whys-pursuing-your-cfre>

<https://myforefront.org/news/whys-pursuing-your-cfre-part-2>

[https://www.reddit.com/r/nonprofit/comments/4zj67c/getting ready to take the cfre certification any/](https://www.reddit.com/r/nonprofit/comments/4zj67c/getting_ready_to_take_the_cfre_certification_any/)

<http://www.givingcityaustin.com/takeaction/cfre-raising-bar-fundraising-austin/>