



THE credential for fundraising professionals

In cooperation with leading philanthropic associations

2007-2008 Candidate Handbook and Applications for Initial Certification and Recertification

Certified Fund Raising Executive (CFRE) Programme

CFRE International

Certifying fundraising executives

Setting standards in philanthropy

CFRE Participating Organisations are:

- Association for Christian Development Professionals (ACDP)
- Association for Healthcare Philanthropy (AHP)
- Association of Alumni and Development Professionals in Education (ADAPE)
Australasia
- Association of Fundraising Consultants-U.K. (AFC)
- Association of Fundraising Professionals (AFP)
- Association of Lutheran Development Executives (ALDE)
- Association of Philanthropic Counsel (APC)
- Canadian Association of Gift Planners * Association canadienne des professionnels
en dons planifiés (CAGP*ACPD)
- Council for Resource Development (CRD)
- Fundraising Institute Australia (FIA)
- Fundraising Institute of New Zealand (FINZ)
- Giving Institute, The
- Institute for Development Professionals in Education (IDPE)
- International Catholic Stewardship Council (ICSC)
- National Catholic Development Conference (NCDC)
- New England Association for Healthcare Philanthropy (NEAHP)
- North American YMCA Development Organization (NAYDO)
- Philanthropic Service for Institutions (PSI)
- United Way of America

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Welcome to the CFRE Programme

CFRE International is pleased to welcome you to the certification process. As stewards of the public trust, Certified Fund Raising Executive (CFRE) International certifies fundraising professionals who demonstrate the knowledge, skills and commitment to the highest standards of ethical and professional practice in serving the philanthropic sector.

CFRE International fulfills this mission by establishing and administering a voluntary certification process based on current and valid standards that measure competency in the practice of philanthropic fundraising.

In furtherance of its mission, CFRE International promotes voluntary certification, in dialogue with government and other bodies globally, as the preferred alternative to licensure and/or government regulation.

Benefits of the CFRE Programme

By becoming a Certified Fund Raising Executive (CFRE), you are joining thousands of other dedicated professionals in enhancing the status and credibility of the profession.

- 1. Certification grants you more 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.
- 2. Certification can improve career opportunities and advancement.** CFRE certification can give you the “edge” when being considered for a promotion or other career opportunities. CFRE certification clearly identifies you as an employee who has demonstrated mastery of fundraising principles and techniques based on accepted best practices.
- 3. Certification prepares you for greater on-the-job responsibilities.** CFRE certification is a clear indicator of your willingness to invest in your own professional development. Certified professionals are aware of the constantly changing environment around their profession and possess the desire to anticipate and respond to change.
- 4. Certification improves skills and knowledge.** Typically, achieving CFRE certification requires training, study and “keeping up” with changes. CFRE certification showcases your individual mastery by confirming proficiency and knowledge in the field. CFRE certification also requires recertification every three years, proving you stay ahead of the curve in fundraising.
- 5. Certification may provide for greater earnings potential.** Many fundraising professionals who have become CFRE certificants experience salary and wage increases based on their certification status. Studies show that on average CFRE certificants earn 17% more than their non-certified counterparts. In addition, CFRE certificants are in high demand internationally.
- 6. Certification demonstrates your commitment to the fundraising profession.** Receiving CFRE certification shows your peers, supervisors and, in turn, donors your commitment to your chosen career and your ability to perform to set standards.
- 7. Certification enhances the profession’s image.** CFRE certification programme seeks to grow, promote and develop certified professionals, who can stand “out in front” as role models in the fundraising field.
- 8. Certification reflects 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 philanthropy.
- 9. Certification builds self-esteem.** CFRE certification is a step toward defining yourself beyond a job description or academic degree while gaining a sense of personal satisfaction.

10. Certification offers greater recognition from peers. As a CFRE certificant, you can expect increased recognition from your peers for taking that extra step in your professional career.

As a professional fundraising executive, you deserve to be recognised and appreciated for what you do. And like most professionals, you want to become better at it. You look for opportunities for on-going meaningful professional development, and practical ways to evaluate your own work that will help you grow. This is one reason the CFRE credential was created.

About CFRE International

Founded in 2001, CFRE International is the certifying agency responsible for the governance and administration of the only universal, baseline credential available to fundraising professionals.

The Certified Fund Raising Executive (CFRE) credential was first awarded in 1981 by what was then the National Society of Fund Raising Executives (NSFRE), now the Association of Fundraising Professionals (AFP). In 1983, the Association for Healthcare Philanthropy (AHP) established a certification program, awarding the Certified by the Association for Healthcare Philanthropy (CAHP) designation. In 1996, NSFRE and AHP, merged their certification programs and helped found CFRE International as an objective body dedicated to setting standards in philanthropy.

CFRE International currently works in conjunction with nineteen philanthropy associations in five countries and continues to seek additional organisations to participate in support of the credential. Those organisations include:

- Association for Healthcare Philanthropy (AHP)
- Association of Christian Development Professionals (ACDP)
- Association of Development and Alumni Professionals in Education (ADAPE) Australasia
- Association of Fundraising Consultants-U.K. (AFC)
- Association of Fundraising Professionals (AFP)
- Association of Lutheran Development Executives (ALDE)
- Association of Philanthropic Counsel (APC)
- Council for Resource Development (CRD)
- Canadian Association of Gift Planners * Association canadienne des professionnels en dons planifiés (CAGP*ACDP)
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- New England Association for Healthcare Philanthropy (NEAHP)
- North American YMCA Development Organisation (NAYDO)
- Philanthropic Service for Institutions (PSI)
- United Way of America

CFRE International's Board of Directors, elected by current certificants in good standing, is responsible for awarding the CFRE credential, establishing eligibility criteria, examination content, passing scores, recertification requirements, and if necessary, revoking the credential.

Certified Fund Raising Executive (CFRE) certificants distinguish themselves within the profession by demonstrating their experience, practice and performance, service and commitment to ethical principles.

Certificants have at least five years of professional experience as a member of a philanthropic fundraising staff or as a consultant to a nonprofit bringing a significant knowledge base to any position.

Certificants continue to obtain current professional development information, explore new knowledge in specific content areas, master new fundraising related skills and techniques, and conduct professional practice in an ethical and appropriate manner through mandatory recertification.

Certificants are personally and professionally invested in their community. Through participation in professional associations and/or community organizations (i.e., local church, youth groups, service clubs, etc.), members are active volunteers who care about their community.

CFRE certificants must agree to uphold the *Donor Bill of Rights* and abide by *CFRE International Accountability Standards*.

The program is open to any eligible fundraising executive regardless of membership affiliation. The program consists of an assessment of an eligible candidate's professional practice, fundraising accomplishments, continuing professional education, and service to the profession and/or other not-for-profits as evidenced through a comprehensive written application. In addition, each candidate's mastery of fundraising principles and techniques will be measured by a written examination.

One of the greatest strengths of CFRE International is its collaborative efforts. By creating a single credentialing programme endorsed and supported by various associations within the profession, the CFRE credential provides the public and employers with a single mark of professionalism.

CFRE International adheres to the highest standards by bench-marking its practices against standards set for certification programmes. The National Commission for Certifying Agencies (NCCA) of the National Organisation for Competency Assurance (NOCA) has established criteria for certification agencies. Currently, CFRE International seeks accreditation by NCCA in the United States.

About the Certified Fund Raising Executive (CFRE) Examination

The Certified Fund Raising Executive (CFRE) Examination is designed as a practice-based exam for practitioners to assess mastery of the six core knowledge areas, as detailed in the Test Content Outline. The Examination is neither designed nor intended to cover any particular aspect of the fundraising process in depth.

The examination consists of 225 multiple-choice questions. (25 of these questions are pre-test items and do not affect a candidate's score.) Candidates are presented with a question and are asked to choose the correct answer from the four options provided. Only one answer is correct. There are no "trick" questions on the examination. There is no penalty for guessing.

Each candidate is allowed a maximum of four (4) hours to complete the exam.

CFRE Test Content Outline

Listed below are the areas tested on the exam. These are the tasks Certified Fund Raising Executive (CFRE) certificants are expected to be able to perform and the critical knowledge areas required to perform the tasks listed.

I. Current and Prospective Donor Research (16.5% - 33 Items)

- A.** Develop a prospect list by identifying individuals and groups who have the capacity and propensity to give in order to qualify candidates for further research and cultivation efforts

- B. Analyse the prospect list using characteristics such as interest, values, giving history, and relationship to the organisation in order to select potential donors for particular projects
- C. Implement and utilise a data management system that stores information about prospects to enable retrieval and analysis
- D. Rate prospects in categories of giving potential in order to prioritise and plan solicitations

Key Knowledge Areas for the above tasks:

- Trends and characteristics (such as socioeconomic, historical, and cultural) of a constituency
- Sources and of financial support, (such as individuals, corporations, grant-making bodies, foundations, government) and their motivations, practices, and policies
- Benefits and uses of various market and donor surveys, and donor giving patterns
- Techniques for gathering, segmenting and analysing prospective donor research, indicators of gift potential
- Prospect information sources, including people and written/published materials and electronic
- Prospect screening, qualifying, and rating methods
- Relationships between and among annual, capital/major, and planned giving programmes

II. Securing the Gift (18.5% - 37 Items)

- A. Develop a compelling case for support by involving volunteers, staff, and other groups in order to communicate the rationale for supporting the organisation's fundraising programme
- B. Design and conduct studies and/or surveys to plan and evaluate specific aspects of a fundraising programme
- C. Design a comprehensive solicitation programme in order to generate financial support for the organisation's purpose
- D. Design and conduct training programmes for volunteers, staff, and other groups using various training methodologies in order to increase solicitation effectiveness
- E. Ask for and secure gifts from prospects in order to generate financial support for the organisation's purpose
- F. Prepare donor-centred solicitation materials in order to influence and facilitate informed gift decisions
- G. Evaluate the solicitation programme using appropriate criteria and methodology in order to produce accurate analytic reports for effective decision making

Key Knowledge Areas for the above tasks:

- Psychology of giving, motivations/incentives for giving, ways in which gifts benefit donors
- Case statement and feasibility study components and uses
- External factors that may affect the viability of the organisation and its programmes/services

- Types of gifts (such as cash, securities, grants, property, gifts in kind, bequests and other deferred gifts)
- Solicitation strategies and techniques (such as moves management, relationship management, and prospect management) and their effectiveness with different donor groups
- Fundraising techniques, vehicles, and media, such as:
 - Direct mail
 - Grant proposal writing (foundations, corporations, government)
 - Cause-related marketing corporate sponsorship
 - Planned gifts, including legacies and bequests
 - Major gifts
 - Memorial gifts
 - Special events
 - Capital campaigns
 - Membership programmes
 - Internet fundraising and online solicitations
 - Matching gift programmes
 - Peer-to-peer solicitation
 - Face-to-face solicitation
- peer-to-peer principles and their application to fundraising

III. Relationship Building (25% - 50 Items)

- A. Initiate and strengthen relationships with all constituents through a systematic cultivation plan designed to increase support of the organisation over the long term
- B. Acknowledge and recognise gifts in ways that are meaningful to donors and appropriate to the mission and values of the organisation
- C. Develop and implement a comprehensive communications plan in order to inform constituents and identified markets about the mission, vision, and values of the organisation, its funding priorities, and gift opportunities
- D. Inform constituents about the value of giving in order to promote a culture of philanthropy

Key Knowledge Areas for the above tasks:

- Cultivation techniques as they relate to various prospective donor segments or other stakeholders
- Methods for optimising relationships between and among constituencies and external spheres of influence
- Components of a comprehensive communications plan and processes for creating one
- Communication methods and messages to reach target audiences
- Relationship between philanthropy and fundraising

IV. Volunteer Involvement (10.5% - 21 items)

- A. Create a structured process for the identification, recruitment, evaluation, recognition, and replacement of volunteers in order to strengthen the organisation's effectiveness
- B. Empower and support volunteers by providing orientation, training, and specific job descriptions in order to enhance the volunteers' effectiveness

- C. Engage volunteers in prospect identification, cultivation, and solicitation activities in order to raise funds more effectively and efficiently
- D. Participate in recruiting experienced and diverse leadership on boards and committees in order to ensure that these groups are representative of and responsive to the community they serve
- E. Involve volunteers in the planning, development, and execution of a broad range of activities in order to maximise commitment to the mission and goals of the organization
- F. Delineate the roles of volunteer board members and staff in order to distinguish who have governance and management responsibilities

Key Knowledge areas for the above tasks:

- Personality types and personality attribute theories
- Volunteer roles and job descriptions in fundraising
- Volunteer recruitment, management, retention, recognition, and evaluation techniques
- Principles of adult learning
- Strategies for optimising volunteers' time and talent

V. Management (20% - 40 items)

- A. Participate in the organisation's strategic planning process in order to ensure that philanthropy is an integral part of the strategic plan
- B. Design and implement short-and long- term fundraising plans and budgets in order to support the organisation's strategic goals
- C. Conduct performance analysis of the fundraising programme using accepted and appropriate standards in order to assess efficiency and effectiveness
- D. Recruit, train and support staff by applying human resource principles in order to foster professionalism and achieve the goals of the organisation
- E. Supervise staff by applying appropriate human resource principles in order to foster a productive, team-oriented work environment and enhanced personal performance
- F. Contract for various services, when appropriate, in order to optimise the efforts of the fundraising function
- G. Create gift acceptance and acknowledgement policies in order to reflect the values of the organisation and satisfy legal and ethical standards

Key Knowledge Areas for the above tasks:

- Culture and definition of philanthropy
- Governance models, mission/vision statement components and uses

- Strategic and action planning methods as they relate to fundraising
- Financial management (including budgeting, financial statements, return on investment) and human resource management (including, training, managing, evaluating)
- Development audit and standards and methods used to analyse fundraising effectiveness
- Contract service provider/consultant management
- Methods for assessing the organisation's impact on the community
- Policy development procedures (i.e., gift acceptance policies)
- Data management, record-keeping systems and security procedures

VI. Accountability (9.5% - 19 items)

- A. Report to constituencies the sources, uses, and management of donated funds in order to preserve and enhance confidence in the organisation
- B. Ensure that the intent of gifts is honoured so that public trust is established and preserved
- C. Ensure that the solicitation of gifts is conducted in accordance with the regulatory environment in which fundraising activities are conducted
- D. Clarify, implement, and monitor donors' instructions by ensuring that allocations are appropriate and documented in the organisation's financial records
- E. Comply with all reporting requirements and regulations in order to demonstrate commitment to accountability and transparency

Key Knowledge Areas for the above tasks:

- *Donor Bill of Rights/Donors' Charter*
- Ethical principles relevant to cultivation, securing and accepting gifts
- Laws and regulations affecting donors and not-for-profit organisations
- Legal and ethical practices related to donor record maintenance, gift accounting, and audit trails
- Development of /adherence to gift acceptance policies
- Methods of recording, receipting, recognising, and acknowledging gifts
- Accounting principles for not-for-profit organisations
- Personal privacy and information protection

Exam Scores

One point is granted for each correct answer. There is no penalty assessed for an incorrect answer; points are scored only for correct answers.

The "passing point" for each examination has been set according to accepted practices for standardised testing. CFRE International uses the widely accepted Modified Angoff method. Scores are reported as a scaled score between 200 and 800. A candidate must achieve a score of at least 500 in order to be certified.

Candidates will be provided with information on the maximum score available and their score in relationship to that maximum. In addition, candidates will be provided with their performance on the exam across each of the six major categories. A candidate scoring below the minimum score has not been successful on the exam and cannot be certified.

The exam is not scored on a curve. There are not a predetermined number of candidates permitted to pass. Your score does not depend on the other candidates who are testing with you that day.

Note: *The passing point set for the exam cannot be appealed. To score one point below the passing point is to fail the exam; to score at the passing point or higher is to pass the exam. A score higher than the passing point is not an indication of a higher proficiency in the subject matter.*

North American Candidates:

Each candidate will receive a preliminary pass/fail notice upon exiting the testing centre. A full, detailed score report will be sent in the mail after the close of the testing window during which the candidate testing. Because scores are confidential, these detailed reports are sent directly to the candidate from the testing company. Results will not be given out over the phone. This expanded Score Report will provide the candidate's actual score. The report also will provide details of the candidate's score in each content area.

Candidates in Australia, New Zealand and the United Kingdom:

Candidates will be sent a detailed Examination Score Report approximately four (4) weeks after taking the exam. Because scores are confidential, they are sent directly to the candidate from the testing company. Results will not be given out over the phone. This Score Report will provide the candidate's score and notice of passing or failing the examination. The report also will provide details of the candidate's score in each content area.

Applying for Your CFRE

You must submit a completed application in order to determine whether you are eligible to test. To apply for the CFRE credential, you must complete the following steps:

60 DAYS BEFORE EXAM DATE

Your application must be sent to CFRE International at: 4900 Seminary Road, Suite 670, Alexandria, VA 22311 so it is postmarked no later than this date. Applications postmarked after the deadline will automatically be considered for the next testing period.

60 - 45 DAYS BEFORE EXAM DATE

Your application is reviewed for compliance with necessary requirements. If there are questions while reviewing your application, you will be contacted directly for additional information. Candidates will be sent Authorisation to Test notices via email as their applications are approved.

45 DAYS BEFORE EXAM DATE

You are sent an Authorisation to Test notice indicating you are eligible to write the CFRE Examination during the time frame you requested OR a detailed letter of items still necessary for eligibility will be sent. This information can be conveyed to you in writing only, results will not be given over the phone.

Eligibility Requirements

In order to become a Certified Fund Raising Executive (CFRE), you must submit a written application which meets the requirements in each of the four categories; you must receive a passing score on the CFRE examination; you must agree to uphold the *Donor Bill of Rights* and the *CFRE Accountability Standards*; and pay all appropriate fees. Candidates must meet all requirements at the time they sit for the examination. The requirements of the written application are as follows:

EDUCATION – 80 points

You receive one (1) point toward this category for every one (1) hour of attendance at educational programmes during the past five (5) years.

Continuing Education Credit Policy

The goal of the certification process is to assure as much as possible the continuing competence of each Certified Fund Raising Executive (CFRE) and maintain the professional standard of those engaged in fundraising practice. Continuing education *courses provide one of the main methods for keeping up with professional practice.*

The purposes of the continuing education requirements established by the CFRE International are that CFREs continue to:

- obtain current professional development information
- explore new knowledge in specific content areas
- master new fundraising-related skills and techniques
- expand approaches to effective fundraising
- further develop professional judgment
- conduct professional practice in an ethical and appropriate manner

CFRE International recognises that the fundraising professional engages in lifelong development to maintain and improve knowledge and skills for competent practice. This includes continuous self-assessment to identify professional strengths and learning needs, establishment of short- and long-term goals for individual professional development, and selection of appropriate continuing education to meet these goals.

Candidates should choose those educational programmes that provide them with the most benefit, keeping in mind that the length and rigor of a programme contribute to its value. Advance planning for continuing education enables candidates to choose more appropriate courses and also to control expenses more effectively.

Candidates applying for *Initial* certification must document a **minimum of 80 points** in the Education category. Candidates applying for *Recertification OR Inactive Status* must document a **minimum of 45 points** in the Education category.

Candidates are awarded points for three types of continuing education activities: attending sessions, presenting sessions, and authoring.

For general ATTENDANCE at workshops, seminars, conferences and in-service training, points are awarded according to the actual amount of time spent under instruction at a ratio of 1:1. Forty-five (45) – sixty (60) minutes of instruction = one education point; 1 semester credit = fifteen (15) points. Points are not awarded for sessions that are fewer than 45 minutes in length but can be pro-rated for sessions exceeding sixty (60) minutes (i.e., a session one hour and fifteen minutes in length = 1.25 pts.)

A *minimum* of 20% of total education points must be earned from educational offerings given by presenters outside the candidate's institution. (*Example: Courses taught by an outside speaker in the candidate's development office are applicable towards this 20%; a course taught by the candidate's Vice President for Development at the institution's annual retreat would not be applicable towards this 20%.*)

For PRESENTING educational material at workshops, seminars, conferences, and in-service training:

PRESENTATION OF PREVIOUSLY DEVELOPED MATERIALS: Candidates who present previously developed materials – whether developed by an outside organisation or by themselves – can receive points for these activities. Points are awarded according to the actual amount of time spent providing instruction at a ratio of 1:2. The awarding of double points is in recognition of the additional time required to prepare and refine presentation materials for a session or programme. Candidates may only report a particular presentation ONE (1) time per year. A maximum of thirty-six (36) points for presenting sessions is permitted.

DEVELOPMENT AND PRESENTATION OF NEW EDUCATIONAL MATERIALS: Candidates who research, develop, prepare and present new educational sessions from scratch can receive points for these activities. Points are awarded in relationship to the actual amount of time spent providing instruction at a ratio of 1:3. The awarding of triple points is in recognition of the additional time required to research, develop learning objectives, prepare and present brand new presentation materials for a presentation or programme. A maximum of thirty-six (36) points for developing and presenting sessions is permitted.

Education points are not awarded for coordinating educational programmes if the candidate does not present. Such activities may be reported in the Service Category.

AUTHORING: Points for authoring published materials are awarded on a sliding scale. Published materials must be a fundraising-related article, chapter, book, or dissertation. ***Materials produced as part of employment responsibilities do not qualify for continuing education points.*** All materials submitted for points must have been published since the candidate's last certification/recertification. A maximum of thirty (30) points for authoring is permitted.

ARTICLES must cover a fundraising-related topic as outlined in this policy and must be a minimum of 500 words in length. 5 points will be awarded for each article. Candidate's name must appear as the article's author or co-author and a full bibliographic citation and copy of the article must be provided.

BOOK CHAPTERS must cover a fundraising-related topic as outlined in this policy. 15 points will be awarded. Candidate's name must appear as the chapter's author or co-author and a full bibliographic citation must be provided, along with a photo copy of pages showing candidate's attribution for the chapter.

A BOOK must cover a fundraising-related topic as outlined in this policy. 30 points will be awarded. Candidate's name must appear as the article's author or co-author and a full bibliographic citation must be provided, along with a photocopy of citation page showing candidate's attribution for authorship.

COURSE CONTENT: Continuing Professional Education activities reported to CFRE International must be in subject areas covered on the CFRE Text Content Outline. The Text Content Outline is located in the CFRE International Candidate Handbook and on the CFRE website at www.cfre.org, click on Exam Information.

FUNDRAISING CONTENT:

- Current and Prospective Donor Research
- Securing the Gift
- Relationship Building
- Volunteer Involvement
- Management
- Accountability

NON-FUNDRAISING CONTENT: CFRE International recognises that certain continuing education opportunities, while not directly fundraising related, will enhance your performance as a fundraising professional. Examples of such courses include: technology training, software package training, human resource principles, and personal development such time management skills.

Such topics are applicable for a maximum of 1/ 8 of the total points required for certification or recertification. This is a maximum of ten (10) points for Initial Certification and five (5) points for Recertification.

SOURCE OF COURSE WORK:

Individual CFRE certificants are responsible for determining whether a programme meets requirements and qualifies for continuing education points. Only courses, workshops or seminars that meet these requirements should be reported on certification applications. Reported programmes should:

- Update or enhance professional knowledge and skills required for competent performance at the 5-year level.
- Present current and correct content as documented in the body of professional knowledge and best practice.
- Foster mastery of new knowledge required at the 5-year practice level.
- Assist in self-assessment of knowledge and skills.
- Provide opportunities for interdisciplinary learning, professional growth and development.
- Further develop professional judgment and promote professional practice in an ethical and appropriate manner.
- Be developed and conducted by persons or organisations qualified in the subject matter and in instructional design.
- Be an organised educational activity offered by a college, university, association, non-profit or for-profit entity. Educational activities may include electronic media, audio or video tapes of previously presented, formal educational programmes.

Self-Study programmes may be eligible for points. Acceptable self-study programmes are defined as courses using 1) printed material, 2) periodicals, 3) audio/video cassettes, or 4) electronic media, **each with accompanying test**. However, audio/video cassettes or on-line presentations of previously presented, formal educational programmes are eligible.

Activities such as reading trade publications, membership magazines, and newly released fundraising books are an expected part of the daily activities of the caliber of professionals who become Certified Fund Raising Executives. Keeping abreast of current fundraising literature is a valuable experience but is not considered continuing education for the purposes of certification or recertification.

Candidates can obtain course work from any number of sources. No particular course providers are required, however all reported course work must be substantiated by proof of attendance and/or completion in accordance with the Document Verification Policy.

ALTERNATIVES TO COURSE WORK FOR RECERTIFICATION

At any time, to satisfy the Education Point requirement for recertification, a candidate can take the current form of the written examination. The candidate must receive a passing score in order for the exam to be accepted in lieu of course work. Candidates must submit a request in writing to take the examination for this purpose and must pay the current fee for an initial certification application.

Professional Practice – 60 points

You earn one (1) point for each month of full-time employment as a professional member of a fundraising staff or as a fundraising consultant to not-for-profit organisations. At least fifty percent (50%) of job duties and responsibilities **must** be assigned to fundraising activities, resource development and management of fundraising leading to the generation of philanthropic support. If you work part time, please contact CFRE International for determination.

These points can be accumulated for employment during the past eight (8) years, which allows for employment gaps. You can earn one (1) point for any single month of employment – *you cannot earn more than one point for any single month.*

Note for Consultants: It is acknowledged that consultants do not typically work for clients in 40-hour-week time-blocks. Points may be earned for each singular month you were retained by client(s), regardless of whether you worked each day in that month.

Performance – 55 points

Points in the Performance Category can be earned in three ways for activities that have taken place during the past five (5) years:

- One (1) point for each 25,000 in funds raised in your own currency. Funds can be aggregated before points are calculated
- Five (5) points for each specific **Communications** activity or project with measurable outcomes or results which impacted your fundraising activities
- Five (5) points for each specific **Programme, Institutional or Financial Management** activity or project which impacted your fundraising activities

Service – 55 points

Points are awarded for **non-job related** volunteer service activities in your community or professional associations. There is a scale of points awarded depending on the level of service. All service must have taken place during the past five (5) years. Points are not awarded for general membership with an organisation.

Eligibility Documentation

Candidates are not required to submit back-up documentation of reported points at the time of application. Candidates are required to sign a disclosure statement attesting to the accuracy of the information provided.

CFRE International does reserve the right to request backup documentation to substantiate your claimed points at any time. Candidates are encouraged to keep copies of documentation AND of their completed application form.

Beginning January 1, 2004, for each examination site and recertification class, up to 5% of the applicants will be randomly selected for document verification through a computer selection process.

Candidates selected for verification will be sent a letter informing them that they have been selected and requesting that all required information be submitted by a specified deadline.

Initial certification applicants: Individuals applying for initial certification shall be selected for verification once the due date for submission of applications has passed. Initial certification candidates shall be given 30 days to submit the necessary documentation. If required documentation is not submitted within the required timeframe, the candidate's application shall be deferred to an alternate test date until such time as the required information is received.

Individuals who submit incomplete or non-verifiable information shall have their applications deferred to an alternate test date until such time as the required information is verified.

All information submitted by candidates for initial certification shall be verified and the candidate shall sit for the exam within the one (1) year time frame allotted for valid applications, for the application shall expire and the fee forfeited.

Recertification applicants: Individuals applying for recertification shall be selected at the time of notification that their certification is due to expire, prior to application. Recertification candidates shall submit the necessary documentation with their completed applications.

If the required documentation is not submitted at the time of submission of their recertification application, candidates shall automatically be deferred into their six (6) month grace period.

Individuals who submit incomplete or non-verifiable information shall automatically be deferred into their six (6) month grace period.

All information submitted by candidates for recertification shall be verified within the six (6) month grace period allotted or the candidate's certification shall expire and be removed.

Review and Acknowledgement of Application Packets

All application packets will be thoroughly reviewed to ensure your eligibility to take the examination. It is your responsibility to make sure the packet is complete.

Candidates will be notified via e-mail that their application has been received. Candidates wishing other confirmation of receipt of applications should send the application via a traceable mail service (FedEx, Purolator, Airborne, etc.) **OR** should include a self-addressed, stamped postcard in the application packet which will be returned once the application is received.

Denial of Eligibility

Eligibility for the Certified Fund Raising Executive (CFRE) Programme may be denied when:

- any part of the application is incomplete or illegible
- documented information does not meet the necessary point requirements
- the application does not contain correct fees

When an application is denied for eligibility reasons, the candidate will be notified in writing of the reasons. The candidate will have every opportunity to correct and submit whatever documentation is necessary to properly complete the application process and meet the minimum eligibility requirements. The original application is valid for a one (1) year period.

Appeal of Denial of Eligibility

Candidates who fail to meet the eligibility requirements may appeal the decision of the denial to CFRE International under specific conditions. The applicant shall submit a written notice of appeal via a traceable mail service to the CFRE International office no more than 30 days following receipt of notice of denial.

In the written notice of appeal, the applicant shall submit additional, written, factual documentation to support his/her appeal with an explanation of why he or she believes the reviewer erred in his/her decision. The applicant shall bear the burden of proving the denial of eligibility was based on erroneous factual determination of the reviewer.

Candidates view the policy on the CFRE website at www.cfre.org or should contact the CFRE International office for the complete policy concerning the appeal of denial of eligibility.

Fees

All fees must be paid by check, money order, or Visa, MasterCard or American Express credit card in *US Dollars*. Make your check or money order payable to CFRE International.

Initial Application and Examination Fee –

\$600 (USD) Members of Participating Organisations

\$755 (USD) Individuals Not a Member of a Participating Organisation

Individuals who are members of any of the Participating Organisations listed on the application and cover of this booklet may apply to CFRE International at the reduced fee, as a benefit of your professional association's participation in with CFRE International. *Membership affiliation must be indicated and will be verified.*

Individuals who are not members of, **or who do not indicate membership with**, one of the Participating Organisations or are unaffiliated at the time of application must pay the non-member rate.

Reactivation of Authorisation to Test -

\$135 (USD) – All Candidates

If a candidate fails to appear for the testing appointment, does not cancel or reschedule the testing appointment with the testing center at least 72 hours in advance of the testing appointment AND does not notify CFRE International in writing of the emergency event (postmarked within ten (10) business days of the event), ALL fees are forfeited. Candidates in this situation can reactivate their Authorisation to Test for this amount without resubmitting a new application.

Re-Examination Fee - \$260 (USD)

Candidates not achieving the required passing score on the examination may re-take the exam for this fee.

Recertification Application Fee –

\$350 (USD) Members of Participating Organisations

\$440 (USD) Individuals Not a Member of a Participating Organisation

Individuals who are members of any of the Participating Organisations listed on the application and cover of this booklet may apply to CFRE International at the reduced fee, as a benefit of your professional association's participation with the CFRE International.

Individuals who are not members of, **or who do not indicate membership with**, one of the Participating Organisations or are unaffiliated at this time must pay the non-member rate.

Withdrawal of Applications

Candidate applications are valid for one (1) year from the date of submission. If a candidate determines he or she will not be able to test during that one (1) year time frame or the candidate will not be eligible to test during that timeframe, he or she can receive a partial refund of the exam and application fee by withdrawing from eligibility. For Initial Certification, a refund of \$330(USD) for members of Participating Organisations, or \$490 (USD) for individuals not members of a Participating Organisation, will be issued.

If a candidate has already made a reservation to test, the candidate must call the test delivery vendor and cancel the reservation at least three (3) full business days (72 hours) in advance of the scheduled exam date.

The candidate must make the request for withdrawal of eligibility via “certified mail – return receipt requested” or other traceable delivery, postmarked to CFRE International. Upon receipt of the written request, CFRE International will return to the candidate his/her application. A refund of the application and exam fee, minus a processing fee will be sent within four (4) weeks of the written request.

Once CFRE International receives the letter requesting withdrawal, the candidate will no longer be eligible to test. The test delivery vendor will be notified and the candidate’s eligibility removed from all records.

If the request to withdraw eligibility is not received by the expiration date of the application and the candidate does not sit for the examination within the one (1) year of application validity, the candidate will forfeit all application and examination fees.

If the candidate decides to take the examination at a later date, the candidate will need to reapply as a new candidate, meeting all application criteria and fees in force at that time.

Recertification candidates may only withdraw their applications and seek a refund **before** their application is reviewed by the CFRE International Board. If you wish to withdraw your application, you must submit the request in writing and include your full name, address and signature. A refund of \$165 (USD) for members of Participating Organisations, or \$220 (USD) for individuals not members of a Participating Organisation, will be issued. Requests for a refund received after an application has been reviewed will not be considered.

Cancellations or Failure to Appear for a Scheduled Exam

If a candidate is unable to attend a scheduled examination, the candidate must notify the test delivery vendor to reschedule or cancel the testing appointment **at least three (3) business days (72 hours) before the scheduled testing appointment.**

The rescheduled testing appointment must still fall within the original eligibility period stated in the candidate’s first Authorisation to Test (ATT) letter. The full exam fee from the original testing appointment will be applied to the new exam date if proper notification is made.

Candidates **WILL NOT** be able to change a reservation if it is less than three full business days (72 hours) before the scheduled testing appointment. If a candidate does not reschedule or cancel his/her testing appointment within these guidelines, the candidate will forfeit all fees.

If the candidate wishes to take the exam at a later date, the candidate will be required to submit a current application and all applicable fees.

There are five (5) acceptable reasons for not rescheduling or canceling an appointment to test within these guidelines. If a candidate’s reason is accepted, the candidate will be allowed to reschedule the appointment to test, free of charge, for one time only.

The candidate must send notice of the reason, in writing, to the offices of CFRE International within seven (7) business days of the testing appointment. CFRE International reserves the right to request additional evidence to support a candidate’s reason for not rescheduling or canceling the testing appointment according to the guidelines.

Acceptable reasons for failure to reschedule or cancel at least 72 hours before the testing appointment:

1. Serious illness of either the candidate or an immediate family member;
2. Death in the immediate family;
3. Disabling traffic accident;
4. Court appearance or jury duty; or
5. Unexpected military duty call-up

Accommodations for Candidates with Disabilities

Applicants requiring special accommodations must make their needs known to the CFRE International Office at the time of the initial application. CFRE International will endeavour to make reasonable accommodations.

CFRE International certifies that it shall comply with the provisions of the Americans with Disabilities Act (42 uSCG Section 12101, et.seq.) and Title VII of the Civil Rights Act, as amended (42 USCG 2000e, et.seq.) in accommodating candidates who, because of a disability or religious observance, need special arrangements to enable them to take the examination.

A candidate requesting special accommodations must do so in writing and the request **must accompany your completed application**. The request must include supporting documentation from a licensed physician, optometrist, social worker, psychiatrist, religious leader, or other appropriate professional (including title, address, and telephone number on his/her letterhead) reflecting a diagnosis of the condition and/or religious observance AND the specific testing aids or modifications being requested. Accommodations, if approved, will be provided at no additional charge. The request must include the specific changes being requested.

Candidates Whose First Language Is Not English

Currently, the Certified Fund Raising Executive (CFRE) examination is offered in English only. The application form does permit candidates to identify which form of the examination they intend to take, based on their country of residence.

Exams are currently offered for residents of Australia, Canada, New Zealand, the United Kingdom, and the United States. Residents of other countries are permitted to take the CFRE Examination. Candidates who are not residents of one of the countries above will be given the United States form of the exam.

Examination Day

What To Take With You on Exam Day

Take the following items with you to the examination location on examination day:

1. Official photo identification also bearing your signature identification such as a driver's license, passport or government issued ID card.

You will NOT be admitted to the testing area without the above listed items. All other necessary items (i.e., Number 2 pencils) will be provided.

The Examination Environment

Exams are predominantly administered at college and university assessment centers. As with any group meeting space, the temperature can vary. CFRE International ***strongly suggests*** dressing in layers that can be added or removed as the climate in the room dictates.

Both CFRE International and the assessment centre make every effort to locate the exam in a quiet area. There are occasions when external noise, such as a lawn mower or general corridor traffic, cannot be controlled. If you are particularly sensitive to noise or are concerned with your ability to concentrate, you may wish to consider bringing ear plugs.

Examination Time / Lateness

When you schedule your exam in **North America**, you will be making your own personal testing appointment. It is recommended that you arrive at least 15 minutes prior to your appointment time.

Candidate who arrive late may not be admitted to the testing area. This decision will be made at the discretion of the testing centre personnel.

If a candidate is unable to attend a scheduled examination, the candidate must notify the test delivery vendor to reschedule or cancel the testing appointment at least three (3) business days (72 hours) before the scheduled testing appointment.

The rescheduled testing appointment must still fall within the original eligibility period stated in the candidate's first Authorisation to Test (ATT) letter. The full exam fee from the original testing appointment will be applied to the new exam date if proper notification is made.

Candidates **WILL NOT** be able to change a reservation if it is less than three full business days (72 hours) before the scheduled testing appointment.

If a candidate does not reschedule or cancel his/her testing appointment within these guidelines, the candidate will forfeit all fees.

If the candidate wishes to take the exam at a later date, the candidate will be required to submit a current application and all applicable fees.

Candidates testing **outside of North America** should adhere to the reporting times found in their Authorization to Test (ATT) letter.

Security

The participation by any candidate in any irregularity occurring during the CFRE Examination, such as extended absences from the exam room, disruptive outbursts, giving or receiving unauthorised information or aid, as evidenced by observation or subsequent statistical analysis, may be sufficient cause to terminate the candidate's participation, invalidate the results of the exam, or cause other appropriate action.

The Certified Fund Raising Executive (CFRE) examination is protected by federal copyright law. No part of the examination may be copied, reproduced in part or whole by any means whatsoever, including memorisation. The theft or attempted theft of an examination booklet or any part of such is punishable as a felony.

Test Results

Candidates in **North America** testing via computer based testing (CBT) will receive a preliminary pass/fail determination upon exiting the testing room. This is a preliminary assessment of your performance. A full, detailed report will be forwarded within ten (10) days after the close of the testing window. This will include a breakdown of your scores by category, as well as you overall score. Because scores are confidential, they are only sent via mail directly to the candidate from the testing company and results will not be given out over the phone.

Candidates testing **outside of North America** will receive a full and detailed score report four (4) weeks after taking the exam. Because scores are confidential, they are only sent via mail directly to the candidate from the testing company and results will not be given out over the phone.

Score Reports will provide the candidate's actual score and the score required to pass. The report also will provide details of the candidate's score in each content area.

Official Notification of Certification Status

Approximately two (2) weeks after receiving your scores from the professional testing agency, you will receive official notice via a letter of your certification status from CFRE International.

If you have met all the qualifications set forth in the CFRE application, have signed the Accountability Standards and receive a passing score on the CFRE Examination, you will receive a notice of award of certification.

Once you receive this official notice of the award of the designation, you are entitled to use the initials "CFRE" after your name. You may also state that you are a "Certified Fund Raising Executive." Specific guidelines for such use are outlined in the *Style Guide for Use of the CFRE Marks*. You will also receive a certificate signifying your achievement.

If you do not receive a passing score on the examination, you will be sent information on how to register to retake the examination.

If You Are Not Successful on the Examination

When a candidate submits an application and it is approved, the application is valid for a one (1) year period.

If necessary, a candidate may retake the CFRE Examination by completing a Re-examination Registration Form. Candidates must wait three (3) months before sitting for the exam again. If necessary, candidates can sit for the exam a third time.

Recertification

Because fundraising, resource development and management are dynamic and rapidly changing fields, individuals are awarded certification for a three (3) year period.

In order to remain certified, candidates must apply for recertification at the end of each three (3) year period.

Candidates are required to meet requirements in the Education, Practice, Performance, and Service categories. These requirements are designed to show evidence of on-going practice in the fundraising profession and to provide CFRE International with a way to measure continued competence in the field.

Candidates for recertification DO NOT need to retake the CFRE Examination. However, candidates may CHOOSE to sit for the current form of the CFRE Examination in lieu of the Education requirements of the Recertification application. Candidates must meet all additional requirements.

Notice of Recertification

Approximately six (6) months prior to the expiration of your certification, CFRE International will send you a notice of your need to recertify.

*This notice will be sent to your last address on file with CFRE International. **PLEASE** be sure to include CFRE International in your change of address notifications.*

However, it is the professional responsibility of each individual CFRE to be aware of his or her certification expiration date and to complete the application by the stipulated deadlines.

Candidates must submit recertification applications according to when they were originally certified:

Certified **March 1** **due** **January 30**

Certified **June 1** **due** **April 30**

Certified **September 1** **due** **July 30**

Certified **December 1** **due** **October 30**

Inactive Status

Individuals may request to be placed on Inactive Status for up to three years (one recertification period.)

Reasons for requesting Inactive Status include unemployment, maternity/paternity leave, illness, and education.

During the Inactive period, the individual is required to meet the Education requirements of the application so as to keep abreast of changes in the field.

To apply, individuals should send a letter requesting Inactive Status to CFRE International, along with an application form with the first and last pages AND the Education section completed. CFRE International will review the request and send a letter of determination to the individual.

The recertification application fee is not waived for the period a person is Inactive and is to be paid at the time recertification is necessary.

If the individual does not meet the continuing education requirements during the Inactive period, the individual's certification will expire. He or she will be required to begin the process again as a candidate for initial certification.

Right to Review

CFRE International provides an appeal process to any applicant who wishes his or her CFRE Programme application or examination scores to be formally reviewed.

An administrative fee to cover a separate review of the application, all supporting documentation and answer sheet, may be charged for this appeal. Candidates requesting an appeal will not be given access to the examination booklets or answer key.

Requests for appeal must be made in writing within thirty (30) days of receiving notice regarding the CFRE Application or examination scores. The appeal must be sent via a traceable mail service (certified, registered, FedEx, UPS, Purolator, etc.)

Reviews of requests for appeal will be conducted within thirty (30) days of receipt of the request. CFRE International reserves the right to make appropriate rulings, interpretations, decisions in accordance with its stated policies and procedures.

This appeal and review process is the exclusive remedy for candidates. Complete appeal policies and procedures can be obtained by contacting CFRE International.

PLEASE NOTE: CFRE International is an international credentialing programme and follows International English spelling rules according to the *Merriam-Webster's International English Dictionary, 3rd edition*.

Contacting CFRE International

Candidates should direct all questions, concerns and correspondence related to the CFRE certification process or exam to CFRE International as indicated below:

Mail:

CFRE International
4900 Seminary Road, Suite 670
Alexandria, VA 22311
USA

Fax: +1 703.820.1107

Phone: +1 703.820.5555

E-Mail: info@cfre.org

Web Site: www.cfre.org

Preparing for the CFRE Examination

The CFRE Examination is intended to assess your mastery of the body of knowledge required to perform fundraising tasks. The knowledge and tasks that are being tested are based on current fundraising practice – or what tasks professionals perform on the job. It is testing what are commonly accepted as best practices around those tasks – not how your organisation or you personally carry out those duties.

The CFRE Examination is a generalist exam and does not focus on any one area of fundraising. Rather, it expects that you will have a basic working knowledge of a variety of fundraising techniques and practices. However, if you have not had experience in one specific area of fundraising (e.g., special events) that alone should not cause you to be successful on the exam.

No two candidates come to the exam with the same knowledge base. Since experience and educational backgrounds are unique, these differences must be taken into consideration when determining a study method. While some individuals may take the exam without any preparation, the majority become involved in some form of exam preparation. Because the exams measure mastery of the application of the fundraising body of knowledge, it is impossible to train or teach to the exam. The best preparation is to understand the fundraising knowledge requirements (see the *Test Content Outline* which follows) and their application to fundraising practice.

A fundraising professional who has met the eligibility requirements to sit for the examination should have the knowledge needed to take and pass the examination. However, CFRE International does recommend that you review the content areas covered on the exam by using the *Test Content Outline* which follows. You might want to review the *Test Content Outline* for topics or subtopics with which you are less familiar. If you find a particular area with which you are not familiar or comfortable, that would be an area on which to focus your study or review. Or, you may want to do a surface review of all the content areas, even those you believe you know well.

Because of the nature of the exam, there is not one comprehensive source to go to in order to study.

One way to review is to select a book off the Resource Reading List that covers the topics you have identified. Many publications on the list have a great deal of overlap, so select a publication that you may already have on your bookshelf, or that you can borrow from a colleague. Or, select a chapter from within a comprehensive book.

Some candidates find it helpful to form study groups, asking questions of each other and covering a wide variety of topics. CFRE International does not, however, coordinate such groups.

If you have time, take a workshop or attend a conference session on that topic. **Any** professional education courses that cover fundraising topics will add to your knowledge base and therefore will help you on the exam. **However, CFRE International does not sponsor or endorse any educational courses – even if they say they are a “prep” or “review” course for the CFRE Exam.**

Courses titled this way are at the discretion of the organisation offering the course. Those creating the course have NOT had any inside information about the exam. Participation in these courses may help you learn or review topics covered on the exam, but you should not expect them to directly cover exam content.

Following are Seven Steps to Preparing for the CFRE developed by current CFRE certificant, Peter Taylor, CFRE from Edmonton, AB.

STEP 1: Assess your own professional experience: Read *carefully* through the “Test Content Outline” description provided in this booklet. Compare the detailed description of skills and tasks, plus the proportion of questions, to your own professional fundraising experience. Rate your relative skill level and experience on a relatively simple scale of 0-5 (0 = no experience) as an indicator as to how prepared you are, and where to invest more of your study focus in preparing for the exam.

STEP 2: Start early and plan ahead: You must complete and submit your detailed application 60 days before the exam, and it will take you a number of hours to complete the form. *Don't* leave this until the last moment! Focus some learning time reading in every category but spend extra time reading in those categories where your experience is limited. Match your study efforts in relation to the time you have available and the specific study needs you have identified for yourself. Every exam candidate will answer the same number of questions in every category.

STEP 3: Schedule Your Study Time. If you decide to set up a study group, your weekly meeting will take about two hours on one evening every week. Schedule flexible blocks of time into your day timer. The key is not to memorise what you read but to understand philanthropic theory behind best practices in each knowledge category area to supplement your experience in answering questions on the exam. Read at night, read on the subway, read over lunch, but read, Read, READ! This is not an easy exam!

STEP 4: Assemble your study notes in a binder. It may help you to organize your study notes, articles, book summaries, etc. in a binder using either the eight topics of the study manual modules, or the six exam

categories, or your own index. Let your experience guide you in your strongest areas and focus more time in your weaker areas in relation to the relative value that each area will be to you on the exam.

STEP 5: Choose the books that are right for YOUR study plan. Stick to the CFRE International recommended reading lists on the website with special concentration on the books recommended for the country in which your exam is designated (U. S., U.K., Canadian, Australian). These books are on the lists because they reflect the best practices that underpin the job analysis.

STEP 6: Stick to your study group's plan: Pick a regular night and show up on time. Each of you has the same goal and everyone has something to offer. Sharing reading and exchanging book notes is a great way to lighten the load. Study groups foster friendships and provide an incentive to stay focused on your collective goal. Complete, don't compete.

STEP 7: Don't Panic! Follow the excellent pre-exam advice that CFRE International provides and come to the exam well-rested and prepared. Approximately 75% of candidates are successful on their first exam attempt. - *Peter Taylor, CFRE*

CFRE Resource Reading List – References Appropriate for All Candidates

(Additional Country-Specific Resources Follow)

The following references, or books of similar content, may be of use to you as you review for the examination. The books listed are those that were frequently used by item writers and reviewers during item development for this examination. Candidates should not try to study all of these books in depth. Use these books as references for information about content areas or topics for which you need to review.

These books may be found at a local library or purchased through the internet at: www.amazon.com ; www.bn.com; through AFP’s “Marketplace”, or other retail outlets.

Title	General	Current and Prospective Donor Research	Securing the Gift	Relationship Building	Volunteer Involvement	Management	Accountability
Barrett, Richard D. and Molly E. Ware. <i>Planned Giving Essentials: A Step by Step Guide to Success</i> . Gaithersburg, MD: Aspen Publishers, 2 nd edition, 2002.			X				
Briscoe, Marianne G., editor. <i>Ethics in Fund Raising: Putting Values into Practice</i> . IN University Center on Philanthropy: Jossey-Bass Publishers, 1994.							X
Burnett, Ken. <i>Relationship Fundraising: A Donor Based Approach to the Business of Raising Money</i> . San Francisco, CA: Jossey-Bass Publishers, 2002. 2 nd ed.				X			
Ciconte, Barbara Kushner and Jeanne G. Jacob. <i>Fund Raising Basics: A Complete Guide</i> . Gaithersburg, MD: Aspen Publishers, Inc., 2 nd edition, 2001.	X						
Connors, Tracy Daniel. <i>The Nonprofit Handbook: Management</i> . New York, NY: John Wiley and Sons, Inc., 3 rd edition, 2001.						X	X

Title	General	Current and Prospective Donor Research	Securing the Gift	Relationship Building	Volunteer Involvement	Management	Accountability
Dove, Kent E. <i>Conducting a Successful Capital Campaign</i> . San Francisco, CA: Jossey-Bass Publishers, 2 nd edition, 2000.			X	X	X		
Dove, Kent E. <i>Conducting a Successful Major Gifts and Planned Giving Program</i> . San Francisco, CA: Jossey-Bass.			X	X	X		
Dove, Kent E., Jeffrey A. Lindauer and Carolyn P. Madvig. <i>Conducting a Successful Fundraising Program</i> . San Francisco, CA: Jossey-Bass Publishers, 2001.	X						
Dove, Kent E., Jeffrey A. Lindauer and Carolyn P. Madvig. <i>Conducting a Successful Annual Giving Program</i> . San Francisco, CA: Jossey-Bass Publishers, 2001.			X		X		
Fredricks, Laura. <i>Developing Major Gifts: Turning Small Donors into Big Contributors</i> . Gaithersburg, MD: Aspen Publishers, 2003.			X	X	X		
Grace, Kay Sprinkle. <i>Beyond Fund Raising</i> . New York, NY: John Wiley and Sons, Inc., 1997.	X						
Greenfield, James M. <i>Fund Raising: Evaluating and Managing the Fund Development Process</i> . New York, NY: John Wiley and Sons, Inc., 2 nd , 1999.	X					X	X
Greenfield, James M. <i>Fund-Raising Fundamentals</i> . New York, NY: John Wiley and Sons, Inc., 2 nd edition, 2004.	X					X	X

Title	General	Current and Prospective Donor Research	Securing the Gift	Relationship Building	Volunteer Involvement	Management	Accountability
Greenfield, James M. <i>The Nonprofit Handbook: Fundraising</i> . New York, NY: John Wiley and Sons, Inc., 3 rd edition, 2001.	X						
Hogan, Cecilia and David Lamb. <i>Prospect Research: A Primer for Growing Nonprofits</i> . Jones and Bartlett Publishers, 2003.		X					
Johnston, Michael. <i>The Fundraiser's Guide to the Internet</i> . John Wiley & Sons, Inc., 1998.		X	X				
Jordan, Ronald K. and Quynn, Katelyn L. <i>Planned Giving: Management, Marketing and Law</i> . New York, NY: John Wiley & Sons, Inc., 1994.			X				
Joyaux, Simone P. <i>Strategic Fund Development: Building Profitable Relationships that Last</i> . Gaithersburg, MD: Aspen Publishers, 2 nd edition, 2001.	X						
Kihlstedt, Andrea and Catherine P. Schwartz. <i>Capital Campaigns: Strategies That Work</i> . Gaithersburg, MD: Aspen Publishers, 2 nd edition, 2003.			X	X	X		
Kotler, Phillip and Andreason, Alan R. <i>Strategic Marketing for Nonprofit Organizations</i> . Englewood Cliffs, NJ: Prentice-Hall, Inc., 6 th edition, 2002.			X		X	X	
Krit, Robert L. <i>The Fund Raising Handbook</i> . Scott Foresman Professional Books, 1991.	X						

Title	General	Current and Prospective Donor Research	Securing the Gift	Relationship Building	Volunteer Involvement	Management	Accountability
Lautman, Kay Partney. <i>Direct Marketing for Nonprofits.</i> Gaithersburg, MD: Aspen Publishers, 2 nd edition, 2003.			X				
Levy, Barbara R. and Barbara H. Marion. <i>Successful Special Events: Planning, Hosting and Evaluating.</i> Gaithersburg, MD: Aspen Publishers, 1997.				X	X	X	
Mixer, Joseph R. <i>Principles of Professional Fund Raising: Useful Foundations for Successful Practice.</i> San Francisco, CA: Jossey- Bass Publishers, 1993.	X						
New, Cheryl Carter and James Aaron Quick. <i>Grantseeker's Toolkit: A Comprehensive Guide to Finding Funding.</i> New York, NY: John Wiley & Sons, 1998.			X				
Nichols, Judith, Ph.D., CFRE. <i>Pinpoint Affluence in the 21st Century.</i> Chicago, IL: Bonus Books, 2001.		X					
Rich, Patricia and Dana Hines. <i>Membership Development: An Action Plan for Results.</i> Gaithersburg, MD: Aspen Publishers, 2002.				X	X	X	
Rosso, Henry A. and Associates, Eugene R. Temple, editor. <i>Achieving Excellence in Fund Raising.</i> San Francisco, CA: Jossey- Bass Publishers, 2 nd ed., 2003.	X						
Sargeant, Adrian. <i>Marketing Management for Nonprofit Organizations.</i> Somerset, Great Britain: Oxford University Press, 1999.						X	

Title	General	Current and Prospective Donor Research	Securing the Gift	Relationship Building	Volunteer Involvement	Management	Accountability
Scanlan, Eugene A. <i>Corporate and Foundation Fund Raising: A Complete Guide from the Inside</i> . Gaithersburg, MD: Aspen Publishers, 1998.			X	X			
Seiler, Timothy L. <i>Developing Your Case for Support</i> . San Francisco, CA: Jossey-Bass Publishers, 2001.	X						
Warwick, Mal. <i>How to Write Successful Fund Raising Letters</i> . Jossey-Bass Publishers, 2001.			X				
Weinstein, Stanley. <i>The Complete Guide to Fund-Raising Management</i> . New York, NY: John Wiley & Sons., Inc, 1999.	X						
Williams, Karla A. <i>Donor Focused Strategies for Annual Giving</i> . Gaithersburg, MD: Aspen Publishers, 2 nd Edition, 2003.			X	X	X		

Additional Resource Readings for Canadian Form of Examination

Bourgeois, Donald J. *Charities and Not-for-Profit Fundraising Handbook*. Markham, ON: Lexis-Nexis Butterworths, 2000.

Bourgeois, Donald J. *The Law of Charitable and Non-Profit Organizations*. Markham, ON: Lexis-Nexis Butterworths, 2nd edition, 1996.

Canadian Institute of Chartered Accountants (CICA) Not-for-profit Financial Reporting Guide. Toronto, ON: Canadian Institute of Chartered Accountants, 1998.

Caplan, Kenneth J. *Guide to Accounting for Not-for-Profit Organizations, Vol. 1*. Scarborough, ON: Carswell Thompson Professional Publishing, Revised edition, 1997.

Hull, Michael. *Charitable Fundraising in Canada*. Toronto, ON: Canadian Centre for Philanthropy. *National Survey on Giving, Volunteering and Participating*. Toronto, ON: Canadian Centre for Philanthropy, 2000.

Drache, Arthur. *Canadian Taxation of Charities & Donations*. Scarborough, ON: Carswell Thompson Professional Publishing, 1990.

Income Tax Act. *Gifts and Official Donation Receipts, IT 110R3, Non-Qualifying Contributions, 15(c)*. June 1997.

Interpretation Bulletin, IT-110R3. *Benefits of Nominal Value (Section 11)*. June 1997.

Minton, Frank and Somers, L. *Planned Giving for Canadians*. Waterdown, ON: Somersmith, 2nd edition, 1997.

Revenue Canada -- Customs, Excise and Taxation. *Gifts in Kind*.

Sharpe, David. *A Portrait of Canada's Charities*. Toronto, ON: Canadian Centre for Philanthropy.

Additional Resource Readings for United Kingdom Form of Examination

Data Protection Act (1998), Her Majesty's Stationery Office

Gift Aid Scheme, Finance Act (2000), Inland Revenue (Charities) Her Majesty's Stationery Office.

The Institute of Chartered Secretaries and Administrators, **The Charities Manual: A Complete Guide to Voluntary Organisation Management**, ICSA Publishing Ltd, 2003.

The Charities Act (1993). Charity Commission, Her Majesty's Stationery Office.

Additional Resource Readings for United States Form of Examination

Form 990. Internal Revenue Service.

Hopkins, Bruce R. *The First Legal Answer Book for Fund-Raisers*. New York, NY: John Wiley & Sons Inc., 2000.

Hopkins, Bruce R. *The Legal Answer Book for Nonprofit Organizations*. New York, NY: John Wiley & Sons Inc., 1996.

Hopkins, Bruce R. *The Tax Law of Charitable Giving*. New York, NY: John Wiley & Sons, Inc., 1993 and 1998 Supplement.

DONOR BILL OF RIGHTS

PHILANTHROPY is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

1. To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
2. To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
3. To have access to the organization's most recent financial statements.
4. To be assured their gifts will be used for the purposes for which they were given.
5. To receive appropriate acknowledgement and recognition.
6. To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.
7. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
8. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.
9. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
10. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

DEVELOPED BY

American Association of Fundraising Counsel
(AAFRC)
Association for Healthcare Philanthropy (AHP)
Council for Advancement and Support of Education
(CASE)
Association of Fundraising Professionals (AFP)

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