



THE credential for fundraising professionals

In cooperation with leading philanthropic associations

CONTINUING EDUCATION CREDIT POLICY

*Adopted 6 June 2000; revised 2 June 2003; revised 5 June 2006; revised 14 June 2009;
revised 18 March 2010*

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.

POLICY

MINIMUM POINT REQUIREMENTS:

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.



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CALCULATING POINTS:

Candidates are awarded points for three types of continuing education activities: attending sessions, presenting sessions, and authoring. Presentations / materials related to employment responsibilities do not qualify for continuing education points.

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. The Application will not award more than seven (7) points per one (1) day of attendance at applicable continuing education sessions without accompanying agenda documentation.

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, points may be earned as listed below. Presentations on non-fundraising related topics or presentations related to employment responsibilities do not qualify for continuing education points.

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



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programme. Candidates may only report a particular presentation ONE (1) time per year. 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.

For **AUTHORING** published materials, points are awarded on a sliding scale. Published materials must be a fundraising-related article, chapter, book, or dissertation. Materials related to 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 Test Content Outline.** The Test 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



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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 as time management skills.

Attendance at sessions covering such topics is 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.

REVIEW AND/OR PREP COURSES:

CFRE International does not sponsor, endorse, or receive any remuneration from any educational programmes which purport to help candidates prepare or review for the CFRE examination, even if courses are titled as such. Such titles are given at the discretion of the organisation offering the course and do not hold or imply any recognition, approval, or participation by CFRE International or access to inside information from CFRE International.

Formal educational programmes that are titled or claim to review or prepare candidates for the exam will be accepted for points, provided that the course primarily covers fundraising content found on the CFRE Text Content Outline. Formal educational courses that include test-taking strategies will be permitted; however, the portion of time spent on test-taking strategies will be deducted from the total overall course time.

Education category points will not be awarded for participating in informal exam study sessions or groups, or for teaching any such sessions.

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.

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- 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

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. ◆