

Certified Fund Raising Executive (CFRE) Application Summary



Congratulations on taking an important personal and professional step by pursuing certification. As a professional fundraiser, 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.

The Process:

The CFRE International certification process has two parts: 1) written **application** and 2) written **examination**. Candidates must meet the requirements of the written application before they are permitted to test. The application works on a point system. Candidates must meet the point requirements in **each** of four categories in order to be approved to take the examination.

CFRE International has launched a new and convenient way for candidates to track their progress toward meeting the certification requirements. Any candidate can go online to the CFRE International website at www.cfre.org and create his/her own personal and secure account which serves as the application form.

The online form allows candidates to store their accomplishments over time. The application also keeps a running tally for each candidate as to his/her progress towards meeting the points necessary to test. All sections give you the "green light" when you are ready to submit your application. Simply **PRINT, SIGN** and **MAIL**. Applications cannot be submitted electronically.

There is **NO FEE** to start an online application. Candidates only pay the application and exam fee when they are ready to apply.

Steps to Applying:

1. Go to www.cfre.org and click on "Apply Now"
2. Create your own personal login and password (if you are **RECERTIFYING**, **do not create a new account**, use your CFRE-provided log in and password)
3. Enter in your application details and track your progress toward meeting the requirements.
4. Pay for your certification
5. **PRINT, SIGN** and **MAIL** your completed form

Applications for both Initial Certification and Recertification require candidates to document information in four (4) categories: Education; Professional Practice; Professional Performance; and Service. The application works on a point system. Candidates must document a minimum number of points, in **each** category, in order to be approved. The web-based application form is designed to calculate points for you.

Education:

Initial Certification – 80 points required (must be within the past 5 years)

Recertification – 45 points required (must be within the past 3 years)

Academic degrees – 5 points for an Associates degree; 10 points each for bachelors, masters and doctoral degrees

Continuing Education – 1 point for each hour spent **attending** educational conference sessions or workshops. Additional points are awarded for **presenting** at educational conferences or workshops.

All education activities must meet the Continuing Education Credit Policy (Breaks, lunches without speakers and social functions are not eligible for continuing education points. Independent study groups for the examination are not eligible for continuing education points.)

Authoring – Published articles: 5 points (500 words or more); Book chapter: 15 points; Book: 30 points.

Information Required for Application Form

Fund Raising Related: Non-fundraising Related
 Fundraising Related

Title of Session/Publication:

Presenter/Author:

Activity Organizer/Publisher:

Start Date: 03 01 2005

End Date: 03 03 2005

Total # of Contact Hours:

Indicate your role in this event: Attendee
 Presenter (Using existing material)
 Presenter (Using new material)
 Author (of an article)
 Author (of a chapter)
 Author (of a book)

Professional Practice:

Initial Certification – 60 points required (must be within the past 8 years)

Recertification – 30 points required (must be within the past 3 years)

1 (one) month of employment = 1 point

Only one point will be awarded for any given month regardless of the number of employers or clients.

Candidates for the CFRE Program must be employed, full-time, 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.

Consultants must submit a client list for the time period claimed as a consultant.

Information Required for Application Form

Employer

Employer:

Your Title:

Start Date:

End Date: Still Employed

Your Role:

Employer Phone #:

I attest that a minimum of 50% of my time at the above named organization (or with clients served as attached) was spent on duties related to the generation of philanthropic support and that the named organization/client(s) is charitable in nature. (See [Accountability Standards](#))

I Agree:

Professional Performance:

Initial Certification – 55 points required (must be within the past 5 years)

Recertification – 40 points required (must be within the past 3 years)

Candidates can earn points in this category in any of three areas, or a combination thereof. It is not necessary to document points in each of the categories. Full details are available on the application form.

1. Actual Funds Raised: 1 point = 25,000 raised (in your own currency)

2. Communications Projects: 5 points for each project with **outcomes** that had a **measurable impact** on the success of **fundraising** for the organisation.

3. Management Projects: 5 points for each project with **outcomes** that had a **measurable impact** on the success of **fundraising** for the organisation.

Information Required for Application Form for Communications or Management Projects

Employing Organization or Client:

Description of Activity:

Date of Activity: 03 2006

Stated Purpose/Goal:

Materials/Strategy Used:

Measurable Outcome/Results Achieved and Impact on Fundraising Efforts:

Information Required for Application Form for Actual Funds Raised

Organisation:

Fiscal Year Start Date: 07 2005

Fiscal Year End Date: 06 2006

Amount of Funds Raised this Fiscal Year:

Raised Through: *(Check all that apply)*

- Annual Campaigns
- Special Events
- Grants
- Capital / Endowment Campaigns
- Planned Gifts / Bequests

Service:

Initial Certification – 55 points required (must be within the past 5 years)

Recertification – 55 points required (must be within the past 3 years)

Officer of a **Board** of Directors = 20 points per year

Member of a **Board** of Directors = 15 points per year

Chair of a **Committee** = 15 points per year

Member of a **Committee** = 10 points per year

General volunteer/community **service** = 10 points per year regardless of the term of service

Service with **ANY** local, regional, provincial, national or international community-based organisation or professional association or not-for-profit/NGO organisation is applicable. All listed activities must be part of structured volunteer service for specific organisations in which the candidate provides a direct service or acts in a leadership/governance role.

Information Required for Application Form

Organization:	<input type="text"/>
Nature of Service:	<input type="text"/>
Start Date:	<input type="text" value="03"/> <input type="text" value="2005"/>
End Date:	<input type="text" value="03"/> <input type="text" value="2006"/>

Final Steps:

Applicants have the option of including supervisor details. For **Initial Certification** candidates, a letter will be sent to your supervisor if you are ultimately awarded certification **ONLY**.

Application status and exam scores are confidential and will never be released to anyone other than the candidate unless agreed to in writing by the candidate.

Submitting an Application:

ALL candidates must **PRINT** and **SIGN** their application forms and **MAIL** them to CFRE International at 300 N. Washington Street, Suite 504, Alexandria, VA 22314 USA.

Deadlines for submissions of all applications are **POSTMARK** deadlines.

Test Content Outline for Certified Fund Raising Executive (CFRE) Examination



Current and Prospective Donor Research

16% - 32 Items

- A. Develop a list of prospective donors by identifying individuals and groups (foundations, corporations, government agencies, etc.) who have the capacity and propensity to give, in order to qualify prospective donors for further research and cultivation efforts.
- B. Implement and utilize a secure data management system that stores information about current and prospective donors to enable segmented retrieval and analysis.
- C. Analyse the list of current and prospective donors using characteristics such as demographics, interests, values, giving history, relationships, and linkages to the organisation, in order to select potential donors for particular projects and fundraising programmes.
- D. Rate current and prospective donors in categories of giving potential in order to prioritise and plan cultivation and solicitation.
- E. Present the list of current and prospective donors and relevant information to organisational leaders in order to establish consensus for action.

Key Knowledge Areas for the Above Tasks:

- Indicators that identify trends and define characteristics (such as socioeconomic, giving history, generational, gender and cultural) of a constituency
- Donor acquisition strategies
- Sources of financial support (such as individuals, corporations, grant-making bodies, foundations, government)
- Types of information needed to identify prospective donors and determine specific fundraising strategies
- Donor profile components
- Indicators of gift potential
- Donor giving patterns
- Data analysis techniques (such as statistical analysis, data mining, and segmentation)
- Data gathering techniques (such as surveys, focus groups, interviews, social networking)
- Elements of a comprehensive data management system (including data capture, storage, retrieval, maintenance, and security)
- Prospect screening, qualifying, and rating methods
- Motivations, practices, and policies of various funding sources
- Prospect information sources (such as people, written/published, and electronic/online) and their uses and limitations

- Elements of components of a fundraising programme, including annual, capital/major, and planned giving/legacies
- Relationships between and among annual, capital/major, and planned giving/legacies programmes
- Donor survey components and uses
- Market study components and uses
- Privacy legislation and the ethical use of data

Securing the Gift

19% - 38 Items

- A. Develop a compelling case for support by involving stakeholders (such as volunteers, staff, and members of the Board) in order to communicate the rationale for supporting the organisation's fundraising programme.
- B. Apply prospect research data to develop a solicitation plan for involvement of individual donors and/or donor groups.
- C. Plan a comprehensive solicitation programme in order to generate financial support for the organisation's purpose.
- D. Prepare donor-focused and segmented solicitation communications in order to influence and facilitate informed gift decisions.
- E. Ask for and secure gifts from prospects in order to generate financial support for the organisation's purpose.
- F. 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
- Sociological and cultural influences on giving
- Elements and uses of a case statement and a case for support
- Types of gifts (cash, securities, property, gifts in kind, etc.)
- Solicitation strategies and their effectiveness with different donor groups
- Fundraising techniques and programmes such as:
 - Direct marketing (mail, telephone, electronic, direct response television (DRTV), etc.)
 - Special events (dinners, walk-a-thons, tournaments, auctions, etc.)
 - Grant proposal writing (foundations, corporations, government, etc.)
 - Corporate sponsorships, partnerships, and cause-related marketing

- Gift planning (such as bequests, legacies, trusts)
- Major gifts
- Memorial and tribute gifts
- Capital and endowment campaigns
- Membership and alumni programmes
- Gaming and lottery programmes
- Workforce and payroll giving/federated campaigns
- Street collections/face-to-face solicitation
- For-profit activities (such as product sales and charity/thrift shops)
- Community and third-party fundraising
- Other
- Feasibility study components and uses
- Negotiation techniques
- External factors that may affect the viability of the organisation and its programmes/services
- Tangible and intangible ways in which donors benefit from giving
- Peer-to-peer principles and their application to fundraising
- Fundraising programme evaluation standards, procedures, and methods (including benchmark calculations such as cost of fundraising, ROI, fundraising ratios, average gift, response rates)
- Payment structures for contributions (outright, pledge, instalment, etc.)
- Communication methods and messages to reach target audiences
- The use of prospect research to inform cultivation and solicitation strategies
- Involvement of donor advisors
- Use of electronic media in solicitation (email, text messaging, widgets, etc.)

Relationship Building

27% - 54 Items

- A. Initiate and strengthen relationships with all constituents through a systematic cultivation plan designed to build trust in, and long term commitment to, the organisation.
- B. 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.
- C. Promote a culture of philanthropy by broadening constituents' understanding of the value of giving.
- D. Acknowledge and recognise gifts in ways that are meaningful to donors and appropriate to the mission and values of the organisation.

Key Knowledge Areas for the Above Tasks:

- Elements of a cultivation plan
- Components of a comprehensive communications plan and processes for creating one
- Donor acquisition and retention principles
- Communication methods and messages to reach target audiences

- Oral and written communication techniques
- Components and uses of active listening
- Aspects of nonverbal communication (body language, eye contact, etc.)
- Interpersonal communication (e.g. trust building, team building, group dynamics)
- External spheres of influence (such as corporate, governmental, social, civic, professional, and religious leadership) and their interrelationships
- Methods for optimizing relationships between and among constituencies
- Relationship between philanthropy and fundraising
- Benefits of fundraising programmes for organisations
- Relationship strengthening using incentives (such as member benefits, special invitations, premiums, naming rights)
- Donor recognition techniques
- Use of electronic media in relationship building (social networking, video sharing, etc.)

Volunteer Involvement

8% - 18 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 the fundraising process and related activities in order to expand organisational capacity.
- D. Participate in recruiting experienced and diverse leadership on boards and/or committees in order to ensure that 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
- Volunteer job description components and uses
- Principles of adult learning
- Skills training and competency development methods
- Strategies for optimising volunteers' time and talent
- Volunteer recruitment, management, motivation, retention, recognition, and evaluation techniques
- Governance principles and models for not-for-profit organisations
- Value of diversity and community representation
- Respective roles of volunteer board members and staff with respect to governance and management

Leadership and Management

18% - 36 Items

- A. Foster and support a culture of philanthropy across the organisation and its constituencies.
- B. Ensure sound administrative and management policies and procedures to support fundraising functions.

- C. Participate in the organisation's strategic planning process in order to ensure the integration of fundraising and philanthropy.
- D. Design and implement short- and long-term fundraising plans and budgets in order to support the organisation's strategic goals.
- E. Apply key principles of marketing and public relations to fundraising planning and programmes.
- F. Conduct ongoing performance analysis of the fundraising programme using accepted and appropriate standards in order to identify opportunities, resolve problems, and inform future planning.
- G. Recruit, train, and support staff by applying human resource principles in order to foster professionalism and a productive team-oriented work environment.
- H. Contract for services in order to optimise the efforts of the fundraising function.

Key Knowledge Areas for the Above Tasks:

- Components and uses of mission and vision statements
- Strategic and action planning methods
- Fundraising programme evaluation standards, procedures, and methods (including benchmark calculations such as cost of fundraising, ROI, fundraising ratios, average gift, response rates)
- Policy development procedures
- Elements of a fundraising plan
- Place of fundraising in the strategic planning process
- Impact of organisational structures and team dynamics on the effectiveness of fundraising programmes
- Methods for ensuring the integrity of data management and record-keeping systems
- Components and uses of development audits
- Financial management, including budgeting and financial statements
- Use and application of market research
- Marketing and public relations principles
- Benefits of a media programme
- Methods for assessing the organisation's impact on the community
- Training resources appropriate to the different fundraising programme elements
- Staff recruitment, managing, retaining, rewarding, and evaluating techniques
- Culture and definition of philanthropy

- Tools to assess the need for contracted services (e.g. gap analysis)
- 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

Ethics and Accountability

11% - 22 Items

- A. Ensure that all fundraising activities are conducted in accordance with ethical principles and standards.
- B. Create gift acceptance policies that reflect the values of the organisation and satisfy legal and ethical standards.
- C. Clarify, implement, monitor, and honour donors' intent and instructions, and ensure that allocations are accurately documented in the organisation's records.
- D. Report to constituents the sources, uses, impact, and management of donated funds in order to preserve and enhance confidence and public trust in the organisation.
- E. Comply with all reporting requirements and regulations in order to fulfil commitment to accountability and demonstrate transparency.

Key Knowledge Areas for the Above Tasks:

- Laws and regulations affecting not-for-profit organisations, including interactions with their stakeholders (donors, staff, volunteers, etc.)
- Legal and ethical practices related to donor record maintenance, gift accounting, and audit trails
- Methods of recording, receipting, recognizing, and acknowledging gifts
- Elements of gift acceptance policies
- Elements of gift agreements
- Accounting principles for not-for-profit organisations
- Organisational transparency, including methods for reporting fundraising performance, outcomes, and impact to constituencies
- Donor Bill of Rights/Donors' charter
- Personal privacy and information protection
- Ethical principles relevant to cultivation, securing and accepting gifts
- Methods and processes for ethical decision making

CFRE Resource Reading List – References Appropriate for All Candidates

Once you have reviewed the CFRE **Test Content Outline** and identified areas for your personal focus during your study plan, this chart can help you identify which books are most appropriate for review in each area of the CFRE Test Content Outline. Some are also appropriate as general, overview texts.

Title	General	Current and Prospective Donor Research	Securing the Gift	Relationship Building	Volunteer Involvement	Management	Accountability
Ahern, Tom and Simone Joyaux. <i>Keep Your Donors: The Guide to Better Communications & Stronger Relationships</i> .				X			
Ashton, Debra. <i>The Complete Guide to Planned Giving: Everything You Need to Know to Compete Successfully for Major Gifts</i> .			X				
Barrett, Richard D. and Molly E. Ware. <i>Planned Giving Essentials: A Step by Step Guide to Success</i> . Aspen Publishers, 2 nd edition, 2001.			X				
Burnett, Ken. <i>Relationship Fundraising: A Donor Based Approach to the Business of Raising Money</i> . Jossey-Bass Publishers, 2 nd edition, 2002.				X			
Ciconte, Barbara Kushner and Jeanne G. Jacob. <i>Fund Raising Basics: A Complete Guide</i> . Jones and Bartlett, 3 rd edition, 2009.	X						
Connors, Tracy Daniel. <i>The Nonprofit Handbook: Management</i> . John Wiley and Sons, Inc., 3 rd edition, 2001.						X	
Dove, Kent E. <i>Conducting a Successful Annual Giving Program</i> . Jossey-Bass Publishers, 2001.			X	X	X		
Dove, Kent E. <i>Conducting a Successful Capital Campaign</i> . San Francisco, CA: Jossey-Bass, 2 nd edition 2000.			X	X	X		
Dove, Kent E., Jeffrey A. Lindauer and Carolyn P. Madvig. <i>Conducting a Successful Fundraising Program</i> . Jossey-Bass Publishers, 2 nd edition, 2003.	X						

Title	General	Current and Prospective Donor Research	Securing the Gift	Relationship Building	Volunteer Involvement	Management	Accountability
Dove, Kent E., Jeffrey A. Lindauer and Carolyn P. Madvig. <i>Conducting a Major Gifts and Planned Giving Program</i> . Jossey-Bass Publishers, 2002.			X		X		
Fredricks, Laura. <i>Developing Major Gifts: Turning Small Donors into Big Contributors</i> . Jones and Bartlett Publishers, 2006.			X	X	X		
Grace, Kay Sprinkle. <i>Beyond Fund Raising</i> . John Wiley and Sons, Inc., 2 nd edition, 2005.	X						
Greenfield, James M. <i>Fund Raising: Evaluating and Managing the Fund Development Process</i> . John Wiley and Sons, Inc., 2 nd edition, 1999.	X					X	X
Greenfield, James M. <i>Fund-Raising Fundamentals</i> . John Wiley and Sons, Inc., 2 nd edition, 2002.	X					X	X
Greenfield, James M. <i>The Nonprofit Handbook: Fundraising</i> . John Wiley and Sons, Inc., 3 rd edition, 2001.	X						
Hart, Ted and James M. Greenfield, Pamela M. Gignac and Christopher Carnie. <i>Major Donors: Finding Big Gifts in Your Database and Online</i> . John Wiley and Sons, Inc., 2006.		X					
Hogan, Cecilia and David Lamb. <i>Prospect Research: A Primer for Growing Nonprofits</i> . Jones and Bartlett Publishers, 2 nd edition, 2007.		X					
Joyaux, Simone P. <i>Strategic Fund Development</i> . Aspen Publishers, 3 rd edition, 2011.	X						
Kihlstedt, Andrea and Catherine P. Schwartz. <i>Capital Campaigns: Strategies That Work</i> . Aspen Publishers, 3 rd edition, 2009.			X	X	X		
Kotler, Phillip and Andreason, Alan R. <i>Strategic Marketing for Nonprofit Organizations</i> . Prentice-Hall, Inc., 7 th edition, 2007.			X			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> . Aspen Publishers, 2 nd edition, 2003.			X				
Levy, Barbara R. and Barbara H. Marion. <i>Successful Special Events: Planning, Hosting and Evaluating</i> . Aspen Publishers, 1997.			X		X	X	
New, Cheryl Carter and James Aaron Quick. <i>Grantseeker's Toolkit: A Comprehensive Guide to Finding Funding</i> . John Wiley & Sons, 1998.			X				
Nichols, Judith, Ph.D., CFRE. <i>Pinpoint Affluence in the 21st Century</i> . Chicago, Il: Bonus Books, 2001.		X					
Petty, Janice Gow. <i>Ethical Fundraising: A Guide for Nonprofit Boards and Fundraisers</i> . John Wiley and Sons, Inc., 2008.							X
Rich, Patricia and Dana Hines. <i>Membership Development: An Action Plan for Results</i> . Aspen Publishers, 2002.			X	X		X	
Eugene R. Tempel, Timothy L. Seiler and Eva E. Aldrich. <i>Achieving Excellence in Fund Raising</i> . Jossey-Bass Publishers, 3 rd edition, 2010.	X						
Scanlan, Eugene A. <i>Corporate and Foundation Fund Raising: A Complete Guide from the Inside</i> . Aspen Publishers, 1998.			X	X			
Seiler, Timothy L. <i>Developing Your Case for Support</i> . Jossey-Bass Publishers, 2001.	X						
Warwick, Mal. <i>How to Write Successful Fund Raising Letters</i> . Jossey-Bass Publishers, 2 nd edition, 2008.			X				
Williams, Karla A. <i>Donor Focused Strategies for Annual Giving</i> . Aspen Publishers, 2 nd Edition, 2003.			X	X	X		

Candidate Application Notes

1. Start online application at www.cfre.org

a. Log In Email Used: _____

b. Password: _____

2. Review Test Content Outline and Identify Areas for Focused Review

a. Areas for my review:

3. Choose Testing Window and Create Personal Study Plan

a. My Study Plan and Timeline:

4. Seek Local Study Groups or Mentor

a. Study Group/Mentor Meeting Schedule

5. Other Notes