

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 you 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.

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:	<input type="text"/>
Your Title:	<input type="text"/>
Start Date:	<input type="text" value="01"/> <input type="text" value="2004"/>
End Date:	<input type="text" value="04"/> <input type="text" value="2006"/> <input type="checkbox"/> Still Employed
Your Role:	<input type="text" value="Paid Professional Member of Development Staff"/>
Employer Phone #:	<input type="text"/>

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 4900 Seminary Road, Suite 670, Alexandria, VA 22311 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 **(16.5% - 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

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
 - Gift planning, 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

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

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

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

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

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, 2002 2 nd edition				X			
Ciconte, Barbara Kushner and Jeanne G. Jacob. <i>Fund Raising Basics: A Complete Guide.</i> Jones and Bartlett., 2 nd edition, 2008.	X						
Connors, Tracy Daniel. <i>The Nonprofit Handbook: Management..</i> John Wiley and Sons, Inc., 3 rd ed, 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, 2001.	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> . Aspen, 2003.			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 , 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, 2003.		X					
Joyaux, Simone P. <i>Strategic Fund Development</i> . Aspen Publishers, 2 nd edition, 2001.	X						
Kihlstedt, Andrea and Catherine P. Schwartz. <i>Capital Campaigns: Strategies That Work</i> . Aspen Publishers, 2 nd edition, 2003.			X	X	X		
Kotler, Phillip and Andreason, Alan R. <i>Strategic Marketing for Nonprofit Organizations</i> . Prentice-Hall, Inc., 6 th edition, 2002.			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	
Rosso, Henry A. and Associates, Eugene R. Temple, editor. <i>Achieving Excellence in Fund Raising</i> . Jossey-Bass Publishers, 2 nd ed., 2003.	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, 2001.			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