

CFRE STRATEGIC PLAN 2007 - 2009

MISSION AND STATEMENT OF PURPOSE

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 fulfils 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.

VISION OF CFRE INTERNATIONAL

To be the premier global provider of professional certification of proficiency and practice in fund raising and to position the CFRE as the primary credential for career fundraisers for practitioners, employers, and the public.

CONTEXT FOR THE VISION

- The **credibility** of the CFRE credential lies in meeting the highest standards for psychometric validity and reliability, for clarity, and for consistency which requires continuous development and refinement of questions for the test bank as well as policies and procedures for the application.
- The **validity** of the CFRE credential is directly related to its fidelity to current global practice and therefore, regular review and updating of the job analysis must be undertaken.
- The **desirability** of the CFRE credential is linked to both employer and practitioner valuing made possible through demonstrated impact on career advancement and performance and on public respect and trust.
- The **sustainability** of the CFRE credentialing programme will be the result of the following key factors:
 - Continuous cultivation of existing participating organisations to maintain high levels of support and advocacy. A commitment to high levels of service to these major constituents in their terms is essential.
 - Identification of new participating organisations, alliances, and constituents, and securing same through a balanced development plan that weighs maintenance of existing strong relationships with efforts to recruit additional support.
 - Vigilance in monitoring developments to maintain the position of voluntary certification as a preferred alternative to governmental regulation.
 - Provision of responsive processes for completion of applications, maintenance of information for re-certifications, and readily accessible examinations.
 - Creating greater brand awareness through marketing and promotion.
 - Achievement of accreditation by the appropriate international organisation.
 - Positioning the CFRE as a reliable resource for inquiries regarding fund raising standards for all publics.

EXTERNAL ANALYSIS: SUMMARY

- **First world countries are experiencing significant social and cultural change.**
Populations are ageing and are of greater ethnic diversity; increasingly mobile (geographically and professionally); with higher personal disposable income; better standards of education and with a greater awareness of international issues.
- **Government is positioning itself as the *regulator*, rather than the funder of community projects and programmes.**
- **Technology is redefining 'community'.**
The Internet is changing the way people do business and choose to associate; increasing the speed of change, particularly with regard to the communication of ideas.
- **Information, which was once owned by experts and authorities, is now within reach of most people.**
- **Professional fundraisers are operating in an increasingly competitive and demanding environment.**
Donors are better informed while not-for-profit organisations demand higher levels of professional performance.
- **Demands for *transparency* are rising.**
A vocal and activist public have encouraged and the rise of watchdog groups which scrutinise carefully the activities of not only corporations but also not-for-profit organisations.
- **Philanthropic activity and the fundraising profession in general, does not reflect the diversity of society.**
The profession is predominately female and does not reflect the broader demographic of first world countries.
- **'Time poverty' is increasing and decreasing.**
Fundraising professionals have less time to pursue voluntary activities, including professional development. While conversely for the Baby Boomers who are seeking a longer career with more flexible hours of employment, greater time is available to pursue personal and professional interests.
- **Uncertainty is increasing.**
First world countries are experiencing greater levels of uncertainty due to perceptions of international security and trade issues.

GOALS AND STRATEGIES: SUMMARY

➤ GOAL 1: Ensure the continued viability of CFRE

- STRATEGY A Develop and execute a plan to build financial capacity
 - *To include tactics such as:*
 - Assessing financial resources required to carry out strategic plan goals
 - Assessing partnerships
 - Analyzing efficiency and effectiveness of operations
 - Developing plans for increasing revenue and revenue sources

- STRATEGY B Develop and execute a staffing plan to ensure sustainability
 - *To include tactics such as:*
 - Conducting a staffing gap analysis
 - Increasing cross-training
 - Developing both an emergency and non-emergency succession plan

- STRATEGY C Develop and execute a products & services plan to meet ongoing stakeholder requirements
 - *To include tactics such as:*
 - Appropriately aligning fee structure with expenses
 - Reviewing and ensuring existing products and services meet the needs of candidates and certificants
 - Developing additional products and services, if feasible

- STRATEGY D Develop and execute plans to strengthen governance and disaster management
 - *To include tactics such as:*
 - Ensuring ongoing evaluation of Board membership
 - Monitoring diversity
 - Develop a plan for crisis and disaster recovery and ensure backup files/systems

- STRATEGY E Establish criteria for programme operations in each country
 - *To include tactics such as:*
 - Assessing financial resources required to maintain operations
 - Assessing partnerships
 - Developing criteria, metrics and benchmarks for continuing or embarking on operations in each country

➤ **GOAL 2: Demonstrate the credibility of CFRE to all stakeholder groups**

- STRATEGY A Develop and deliver a plan for quality improvement
 - *To include tactics such as:*
 - Recruit and select more diverse group (representing different segments of the fundraising world) and larger number of CFREs to be involved in committees
 - Conduct next job analysis
 - Evaluate and revise current reading list
 - Evaluate and revise eligibility requirements based on job analysis results, if appropriate
 - Evaluate and refine proficiency performance requirements
 - Develop plan to ensure ongoing quality management
 - Develop communication action plan to publish information about quality indicators for CFRE.

- STRATEGY B Obtain accreditation as a certification organisation
 - *To include tactics such as:*
 - Obtain accreditation from NCCA
 - Obtain ANSI accreditation
 - Assess other external accreditation / recognition options

- STRATEGY C Develop and deliver targeted communication messages to strengthen CFRE's reputation as a high quality programme
 - *To include tactics such as:*
 - Identify key stakeholders that are critical to establishing and maintaining the credibility of CFRE (e.g., educators and healthcare employers)
 - Continue to capture survey information from recertificants and certificants to develop key messages for these groups
 - Use survey information to develop key messages supporting credibility of CFRE
 - Disseminate key messages through publications, media, PO conferences, and other methods

➤ **GOAL 3: Build and enhance relationships with key stakeholder groups**

- STRATEGY A Strengthen relationships with Participating Organisations
 - *To include tactics such as:*
 - Define and promote the value that CFRE can bring to each PO
 - Develop and implement a plan to integrate CFRE into each organisation's strategy
 - Position CFRE as a forum for sharing and raising professional standards
 - Develop a mutually beneficial relationship with AFP

- STRATEGY B Strengthen relationships with fundraising practitioners
 - *To include tactics such as:*
 - Segment the market and define the value proposition for each segment
 - Develop programmes that strengthen relationships with each segment
 - Working with POs, identify other key stakeholders and define value proposition to each
 - Develop programmes that strengthen relationships with each stakeholder group
 - Develop action plan to recruit specific stakeholders, such as CASE, IoF, Giving Institute, Resource Alliance, Red Cross, Boy Scouts, and others

- STRATEGY C Identify other key stakeholders and develop an action plan to build relationships
 - *To include tactics such as:*
 - Identifying stakeholder groups and establishing a communication link with them
 - Developing individual cultivation plans for each group to identify and enhance partnerships, information exchanges and other mutually beneficial programmes