



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.

**CFRE Resource Reading List – References Appropriate for All Candidates**  
*(Additional Country-Specific Resources Follow)*

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 <sup>nd</sup> 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 <sup>nd</sup> edition.				X			
Ciconte, Barbara Kushner and Jeanne G. Jacob. <i>Fund Raising Basics: A Complete Guide</i> . Gaithersburg, MD: Aspen Publishers, Inc., 2 <sup>nd</sup> edition, 2001.	X						
Connors, Tracy Daniel. <i>The Nonprofit Handbook: Management</i> . New York, NY: John Wiley and Sons, Inc., 3 <sup>rd</sup> edition, 2001.						X	X
Dove, Kent E. <i>Conducting a Successful Capital Campaign</i> . San Francisco, CA: Jossey-Bass Publishers, 2 <sup>nd</sup> 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		

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 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 <sup>nd</sup> , 1999.	X					X	X
Greenfield, James M. <i>Fund-Raising Fundamentals</i> . New York, NY: John Wiley and Sons, Inc., 2 <sup>nd</sup> edition, 2004.	X					X	X
Greenfield, James M. <i>The Nonprofit Handbook: Fundraising</i> . New York, NY: John Wiley and Sons, Inc., 3 <sup>rd</sup> edition, 2001.	X						
Hogan, Cecilia and David Lamb. <i>Prospect Research: A Primer for Growing Nonprofits</i> . Jones and Bartlett Publishers, 2003.		X					

Title	General	Current and Prospective Donor Research	Securing the Gift	Relationship Building	Volunteer Involvement	Management	Accountability
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 <sup>nd</sup> edition, 2001.	X						
Kihlstedt, Andrea and Catherine P. Schwartz. <i>Capital Campaigns: Strategies That Work</i> . Gaithersburg, MD: Aspen Publishers, 2 <sup>nd</sup> 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 <sup>th</sup> edition, 2002.			X		X	X	
Krit, Robert L. <i>The Fund Raising Handbook</i> . Scott Foresman Professional Books, 1991.	X						
Lautman, Kay Partney. <i>Direct Marketing for Nonprofits</i> . Gaithersburg, MD: Aspen Publishers, 2 <sup>nd</sup> 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	

Title	General	Current and Prospective Donor Research	Securing the Gift	Relationship Building	Volunteer Involvement	Management	Accountability
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 21<sup>st</sup> 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 <sup>nd</sup> ed., 2003.	X						
Sargeant, Adrian. <i>Marketing Management for Nonprofit Organizations</i> . Somerset, Great Britain: Oxford University Press, 1999.						X	
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						

<b>Title</b>	<b>General</b>	<b>Current and Prospective Donor Research</b>	<b>Securing the Gift</b>	<b>Relationship Building</b>	<b>Volunteer Involvement</b>	<b>Management</b>	<b>Accountability</b>
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 <sup>nd</sup> 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, 2<sup>nd</sup> 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, 2<sup>nd</sup> 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*, ICASA Publishing Ltd, 2003.

**The Charities Act (1992)**. 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.