



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