

Test Content Outline for CFRE Examination

Effective 1 January 2016

Current and Prospective Donor Research

(14%--28 items)

1.1 Develop a list of prospective donors by identifying individuals, groups, and entities, such as foundations, corporations, and government agencies, with the linkage, ability, and interest to give in order to qualify prospective donors for further research and cultivation.

1.2 Implement and utilise a secure data management system to ensure data privacy, store information on current and prospective donors, and enable segmented retrieval and analysis.

1.3 Collect and analyse current and prospective donor information including demographics, psycho-graphics, interests, values, motivations, culture, ability, giving and volunteer history, relationships, and linkages to select potential donors for particular projects and fundraising programmes.

1.4 Rate current and prospective donors on linkage, ability, and interest to prioritise and plan cultivation and solicitation.

1.5 Communicate and validate relevant donor information with key organisational stakeholders to establish a plan of action for engagement, cultivation, solicitation, and stewardship.

Key Knowledge Areas for Above Tasks

- Indicators that identify trends and define characteristics such as the socioeconomic status, giving history, generation, gender, and culture of a constituency
- Donor acquisition and retention principles
- Sources of financial support such as individuals, corporations, grant-making bodies, foundations, governmental agencies, and gaming
- Types of information needed to identify prospective donors and determine specific fundraising strategies
- Donor profile components
- Indicators of the donor's ability to give, linkage, and interest
- Donor giving patterns such as recency, frequency, renewal rates, and value
- Data analysis techniques such as statistical analysis, data mining, and segmentation

- Data gathering techniques such as surveys, focus groups, interviews, and social networking
- Elements of a comprehensive data management system including data capture, storage, retrieval, maintenance, and security
- Prospective donor screening, qualifying, and rating methods
- Motivations, practices, and policies of various funding sources
- Prospective donor information sources such as people, written or published sources, and electronic or online sources, and their uses and limitations
- Elements or components of a fundraising programme, including annual giving, capital/major giving, and planned giving/legacies
- Relationships between and among annual giving, capital/major giving, and planned giving/legacies programmes
- Market research components and uses
- Privacy legislation and regulation
- Ethical use of data
- Elements of engagement, cultivation, solicitation, and stewardship plans

Securing the Gift

(23%--46 items)

2.1 Develop a case for support by involving stakeholders in order to communicate the rationale for supporting the organisation's mission.

2.2 Identify solicitation strategies and techniques appropriate to current and prospective donor groups.

2.3 Develop and implement specific solicitation plans for the involvement of individual donors, donor groups and/or entities.

2.4 Prepare donor-focused solicitation communications in order to facilitate informed gift decisions.

2.5 Ask for and secure gifts from current and prospective donors in order to generate financial support for the organisation's mission.

Key Knowledge Areas for the Above Tasks

- Psychology of giving
- Sociological and cultural influences on giving

- Elements of an effective case
- Case statement construction
- Elements of an effective solicitation plan
- Types of gifts such as cash, securities, trusts, property, and gifts in kind
- Solicitation strategies and their effectiveness with different donor groups
- Components and uses of feasibility/planning studies
- Negotiation techniques
- External factors that may affect the viability of the organisation and its programmes and services
- Donor motivations, barriers to giving, and giving behaviour
- Peer relationship principles and their application to fundraising
- Fundraising programme evaluation standards, procedures, and methods including benchmark calculations such as cost of fundraising, ROI, fundraising metrics, average gift, and response rates
- Gift agreements and payment structures for contributions such as outright gifts, pledges, and instalments
- Communication methods and messages to reach target audiences
- The use of prospect research to inform cultivation and solicitation strategies
- Fundraising techniques and programmes such as:
 - a. Direct marketing (for example, mail, telephone, electronic, direct response television [drtv], direct dialogue)
 - b. Special events (for example, dinners, walk-a-thons, tournaments, auctions)
 - c. Grant proposal writing (for example, foundations, corporations, government)
 - d. Corporate sponsorships, partnerships, and cause-related marketing
 - e. Gift planning such as bequests, legacies, and trusts
 - f. Major gifts
 - g. Memorial and tribute gifts
 - h. Capital and endowment campaigns
 - i. Membership and alumni programmes
 - j. Gaming and lottery programmes
 - k. Workforce and payroll giving/federated campaigns
 - l. Community, peer-to-peer, and third-party fundraising
- Involvement of donor advisors, consultants, and legal and financial experts
- Use of electronic media, such as web sites, email, text messages, and social media

Relationship Building

(26%--52 items)

- 3.1 Initiate and strengthen relationships with constituents through systematic cultivation and stewardship plans designed to build trust in, and long-term commitment to, the organisation.
- 3.2 Develop and implement a comprehensive communications plan to inform constituents about the organisation's mission, vision, values, financial and ethical practices, funding priorities, and gift opportunities.
- 3.3 Promote a culture of philanthropy by broadening constituents' understanding of the value of giving.
- 3.4 Acknowledge and recognise donor gifts and engagement in ways that are meaningful to donors and appropriate to the mission and values of the organisation.

Key Knowledge Areas for the Above Task

- Elements of a cultivation plan
- Components of a comprehensive communications plan
- Donor acquisition and renewal strategies
- Communication methods and messages to reach target audiences
- Oral and written communication techniques
- Components and uses of active listening
- Aspects of nonverbal communication such as body language and eye contact
- Interpersonal communication (for example, trust building, team building,)
- External spheres of influence such as corporate, governmental, social, civic, professional, and religious affiliations and their interrelationships
- Methods for optimising relationships between and among constituencies

- Relationship between philanthropy and fundraising
- Benefits of fundraising programmes for organisations
- Using incentives such as member benefits, special invitations, premiums, and naming rights
- Stewardship techniques such as recognition and impact reporting
- Use of electronic media in relationship building
- Definition of a culture of philanthropy

Volunteer Involvement (8%--16 items)

- 4.1 Identify organisational readiness and opportunities to engage volunteers.
- 4.2 Create structured processes for the identification, recruitment, orientation, training, evaluation, recognition, retention and succession of volunteers.
- 4.3 Develop specific role descriptions and terms of commitment to empower and support volunteers and enhance their effectiveness.
- 4.4 Engage various types of volunteers (for example, board, programme, campaign) in the fundraising process to increase organisational capacity.
- 4.5 Participate in recruiting experienced and diverse leadership on boards and/or committees to ensure 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
- Components and uses of volunteer role descriptions and term commitments
- Skills training and competency development methods
- Strategies for optimising volunteers' time and talent
- Volunteer recruitment, orientation, training, 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
- Trends and preferences in volunteering
- Organisation's structure, functions, and culture

Leadership and Management (19%--38 items)

- 5.1 Demonstrate leadership that advances fundraising practice.
- 5.2 Advocate for and support a culture of philanthropy and the advancement of fundraising across the organisation and its constituencies.
- 5.3 Ensure that sound administrative and management policies and procedures are in place to support fundraising functions.
- 5.4 Participate in the organisation's strategic planning process to ensure the integration of fundraising and philanthropy.
- 5.5 Design and implement short- and long-term fundraising plans and budgets to support the organisation's strategic goals.
- 5.6 Employ marketing and public relations principles and tools to support and grow fundraising programmes.
- 5.7 Conduct ongoing performance measurement and analysis of fundraising programmes using accepted and appropriate standards and metrics in order to identify opportunities, resolve problems, and inform future planning.
- 5.8 Recruit, train, and support staff by providing professional development opportunities and applying human resource principles to foster professionalism and a productive, team-oriented work environment.
- 5.9 Utilise external services as needed to optimise the efforts of the fundraising function.

Key Knowledge Areas for Above Tasks

- Components and uses of mission, vision and values statements
- Strategic and action planning methods
- Fundraising programme evaluation standards, procedures, and methods
- Policy and procedure development and evaluation
- Elements of a fundraising plan
- Role 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, financial statements, and audits
- Use and application of market research
- Marketing and public relations principles
- Methods for assessing the organisation's impact on the community
- Training resources appropriate to the different fundraising programme elements
- Human resource management principles, strategies, and practices
- Fundraising roles, job design, and structure
- Culture and definition of philanthropy
- Tools to assess the need for contracted services or other resources
- 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
- Concepts of organisational development

Ethics, Accountability, and Professionalism
(10%--20 items)

6.1 Ensure that all fundraising activities and policies comply with ethical principles and legal standards and reflect the values of the organisation and the community.

6.2 Communicate principles of ethical fundraising to stakeholders to promote ethical practices and strengthen a culture of philanthropy.

6.3 Promote ethical fundraising as a crucial component of philanthropy to strengthen the non-profit sector and support the sector's role as a pillar of civil society.

6.4 Clarify, implement, monitor, and honour donors' intent and instructions regarding the use of gifts.

6.5 Ensure that allocations of donations are accurately documented in the organisation's records.

6.6 Report to constituents the sources, uses, impact, and management of donations to demonstrate transparency and enhance public trust in the organisation.

6.7 Participate as an active and contributing member of the fundraising profession through activities such as mentoring, continuing education, research, and membership in professional associations.

Key Knowledge Areas for the Above Tasks:

- Laws and regulations affecting not-for-profit organisations, including interactions with stakeholders such as donors, staff, and volunteers
- Legal and ethical practices related to donor record maintenance, gift accounting, financial management and audit trails
- Methods of recording, receipting, recognising, and acknowledging gifts
- Elements of gift acceptance policies
- Elements of gift agreements
- Accounting and investment 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 and International Statement of Ethical Principles in Fundraising
- Personal privacy and information protection
- Ethical principles relevant to cultivating, securing, and accepting gifts
- Methods and processes for ethical decision making
- Continuing professional development opportunities in fundraising such as professional organisation membership, mentorship, research, committee involvement, and sources of continuing education
- Mentorship principles
- Professional organisations' roles and resources to support advocacy
- Appropriate avenues for advocacy