



BY SHARILYN HALE, M.A., CFRE

Our Profession, **Our**

How
CFRE
International
works to
benefit your
career and
the profession

THERE ARE MORE THAN 5,200 CFRES WORLDWIDE. During the last three years, the average number of new CFREs has increased 18 percent and the rate of recertification has increased 10 percent, on average.

In spite of differences in nationality, culture, language and regulatory frameworks, the essence of our work as effective and ethical fundraising professionals is the same. Certification emerges from this shared body of professional knowledge and practice.

Since 1981, the CFRE credential has set the baseline standard for professional fundraising practice. CFRE continues to evolve and grow, along with our profession, and has an important and relevant role within professional fundraising.

Why Certification Matters

CFRE certification is voluntary and offers both individual and collective value. Voluntarily choosing certification as an individual practitioner distinguishes your personal commitment to your chosen field. Achieving your CFRE brings a sense of great personal accomplishment and satisfaction. The CFRE shows you and others that you grasp the fundamental knowledge of the profession. >>

CFRE

Furthermore, the *AFP Compensation and Benefits Study* consistently indicates that CFREs have higher compensation than those who do not hold the CFRE credential (see pp. 24–31). In the 2010 study, for example, CFREs in the United States earned \$25,000 more than their non-CFRE colleagues. In Canada the difference is more than \$28,000.

Yet for many fundraisers the importance of the CFRE is about the broader value it brings to the profession. The profession informs the certification, and the certification informs the profession in a mutually beneficial relationship. The profession's voluntarily choosing and supporting certification sends a strong message to the public, our donors, organizations and regulatory bodies. We are proclaiming our

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What Is CFRE International?

CFRE International (CFREI), headquartered in Alexandria, Va. (www.cfre.org), is the global provider of certification for professional fundraising and the only practice-based credential for career fundraisers. CFREI is an independent corporation led by a volunteer board of directors and a small professional staff. CFREI has itself achieved accreditation by the National Commission for Certifying Agencies of the Institute for Credentialing Excellence. (Learn more about these rigorous standards at www.credentialingexcellence.org.)

Between 1981 and 1996, the Association of Fundraising Professionals (AFP, then NSFRE) and the Association for Healthcare Philanthropy (AHP) each had its own certification program (CFRE and CAHP, respectively). In 1997 these certifications were merged into a new single certification, CFRE, which was also endorsed by the National Catholic Development Conference, International Catholic Stewardship Council, Association of Lutheran Development Executives and the Council for Resource Development.

In 2001, CFREI became an independent organization. Both AFP and AHP agreed that independence would be in the best interest of the profession and the long-term credibility of the credential. As part of the transition, AFP and AHP retained their advanced certification programs, the ACFRE and the FAHP, respectively.

AFP and AHP remain important and valued CFREI partners. CFREI also has subsequently welcomed formal relationships with a growing number of leading professional associations worldwide.

"The Fund Raising School is dedicated to the advancement of ethical fundraising. We see education and certification as complementary processes and strongly encourage our participants to earn the CFRE credential," says Timothy L. Seiler, Ph.D., CFRE, director of The Fund Raising School at the Center on Philanthropy at Indiana University in Indianapolis.

Today, CFREI is an important credentialing body with a unique role in offering certification (not to be confused with a certificate) to those who have demonstrated they know the core body of professional knowledge and practice.

commitment to high standards of practice. We are validating public trust when we regulate ourselves.

"Donors are increasingly looking for reassurance that nonprofits are good stewards of their philanthropic gifts," says Marnie Hill, CFRE, manager, legacy giving, at the Canadian Red Cross in Vancouver, British Columbia, and past chair of the AFP Foundation for Philanthropy–Canada. "Professional certification is one way we can show our communities we take that responsibility seriously. My CFRE credential is a critical building block in the foundation of trust that I want to build with donors."

One of the key markers of any profession is the existence of a credible certification program built upon an identified body of knowledge. Back in 1981, the founders of fundraising certification knew this well and understood the importance of the public trust and the profession's need for recognition and credibility.

The same holds true today. In regions where the formalized profession is still new and emerging, the interest in and demand for CFRE certification grows exponentially. Our colleagues internationally see CFRE as a key strategy to help build and standardize their professional communities.

To become a CFRE, practitioners must meet established eligibility requirements (including a minimum of five years experience, continuing education and volunteerism), and pass an examination. Recertification is required every three years as a marker of continued mastery and currency in the field.

CFRE Keeps Pace With the Profession

This summer CFREI will implement a new version of the certification exam. In order to determine what to test and what questions to ask, good certification programs require regular analysis of what professionals are doing and supposed to know. Known as a job analysis study, this is done by all credentialing programs worldwide. Further, CFREI uses professional testing and psychometric services to guide its test development and job analyses, ensuring the integrity of the CFRE program and CFRE's own accreditation.

CFREI conducts this rigorous job analysis among practicing fundraisers every five to six years. The CFRE job analysis is currently the only research of its kind, and it tells us

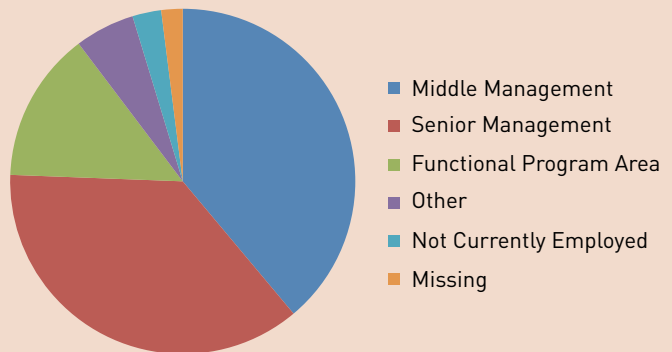
What Are the Most Common Tasks Performed by Fundraisers Around the Globe?

- Develop a list of prospective donors by identifying individuals and groups (foundations, corporations, government agencies, etc.) who have the capacity and propensity to give, in order to qualify prospective donors for further research and cultivation efforts.
- Ask for and secure gifts from prospects in order to generate financial support for the organization's purpose.
- Acknowledge and recognize gifts in ways that are meaningful to donors and appropriate to the mission and values of the organization.
- Ensure that all fundraising activities are conducted in accordance with ethical principles and standards.
- Clarify, implement, monitor and honor donors' intent and instructions, and ensure that allocations are accurately documented in the organization's records.
- Comply with all reporting requirements and regulations in order to fulfill a commitment to accountability and demonstrate transparency.

Source: 2009 CFRE Job Analysis Survey

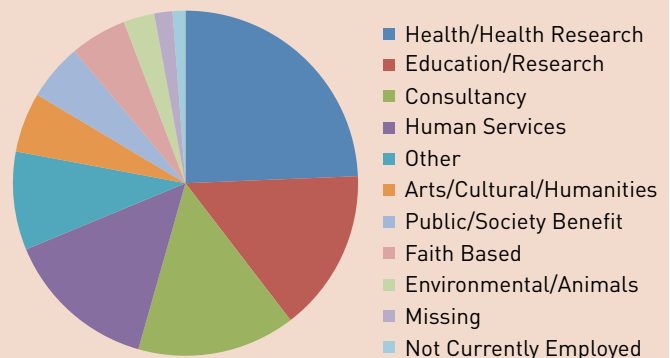
Learn more about the similarities and differences CFRE's job analysis found in fundraising practices among the eight countries surveyed by reading "International Perspective on Fundraising" in chapter 40 of *Achieving Excellence in Fundraising, Third Edition* (Jossey-Bass, 2011).

Respondents' Level of Responsibility



Source: 2009 CFRE Job Analysis Survey

Types of Organizations Represented



Source: 2009 CFRE Job Analysis Survey

a great deal about current professional fundraising practices and emerging trends.

The results identify what members of the profession say is important to their work and the knowledge they must master to conduct their work effectively. Simply put, fundraisers tell CFRE what other fundraisers should know. This then forms the specifications and content of the CFRE examination.

In 2009, CFREI conducted a new job analysis engaging close to 3,000 certified and noncertified fundraisers in eight countries (United States, Canada, U.K., Australia, New Zealand, Brazil, Kenya and Italy) and in three languages (English, Portuguese and Italian).

CFRE's job analysis survey asked fundraisers about the tasks they perform, how frequently they perform them and how important the tasks are to their work. "We spend so much time as fundraisers caught in the day-to-day details that we very seldom take time to think about our practice in the bigger picture. It was intellectually challenging and energizing to work with my CFRE volunteer colleagues to identify the commonalities and fundamental principles of our profession across country, tenure and cultural differences," says Alice Ferris, ACFRE, partner, GoalBusters, in Flagstaff,

Ariz., and a member of the 2009 CFRE Job Analysis Task Force.

The job analysis asked fundraisers how much time they spent on each of the tasks and what knowledge they drew on in order to complete them. The survey included a demographic and professional questionnaire, as well as a final open-ended question about major changes fundraisers anticipated in the profession in the next five years.

What CFRE's Job Analysis Says About the Profession

CFRE's job analysis identified two important aspects about the evolution of our profession.

First, there is remarkable stability in professional fundraising knowledge. Previous CFRE job analyses conducted in 1997 and 2003, as well as that conducted in 2009, provide a longitudinal comparison spanning 12 years.

However, stable does not mean static. Our profession is dynamic and influenced by social and cultural trends, research and technological advancements. Yet these changes have not been erratic. Rather, the stability seen in CFRE's job analysis reflects a maturity in our professional practice and

depth in our shared body of knowledge. As our profession continues to grow, this maturity will deepen.

Study responses from both CFREs and non-CFREs demonstrated the same stability. This affirms that the CFRE is a practice-based credential and not just the practice of a small subset. It reflects profession-identified best practice, regardless of certification status.

Second, professional fundraising knowledge and practice is increasingly global. While there were differences among the various countries surveyed, the variations were statistically modest. We share more things in common with our colleagues around the world, from Kansas to Kenya, than we have differences.

“Though there has been a lot of fundraising going on in Africa for many years, most of it goes undocumented. CFREI gave us an opportunity to share with the rest of the world what is happening in our continent. By identifying and sharing international best practices, we are committed to creating a pool of professionals in fundraising that will take philanthropy within Africa to a higher level,” says Moses Chege, who is with Sight Savers in Kenya and a founding member of the Kenyan Association of Fundraising Professionals.

What CFRE’s job analysis did identify were country-specific variations in the maturity of the profession of fundraising in the surveyed regions. This was evident based on reported levels of knowledge of and engagement in the broad range of fundraising tasks, the frequency with which the tasks were performed and the associated knowledge applied.

In the United States, Canada, U.K., Australia and New Zealand, the results point to an established profession and professional practice that is both broad and well-rooted. In Brazil, Italy and Kenya, the evidence suggests fundraising is an emerging profession, but with a practice that is

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expanding and entrepreneurial. For example, respondents from Brazil led the way among all countries in the knowledge and use of electronic media in solicitation and relationship building.

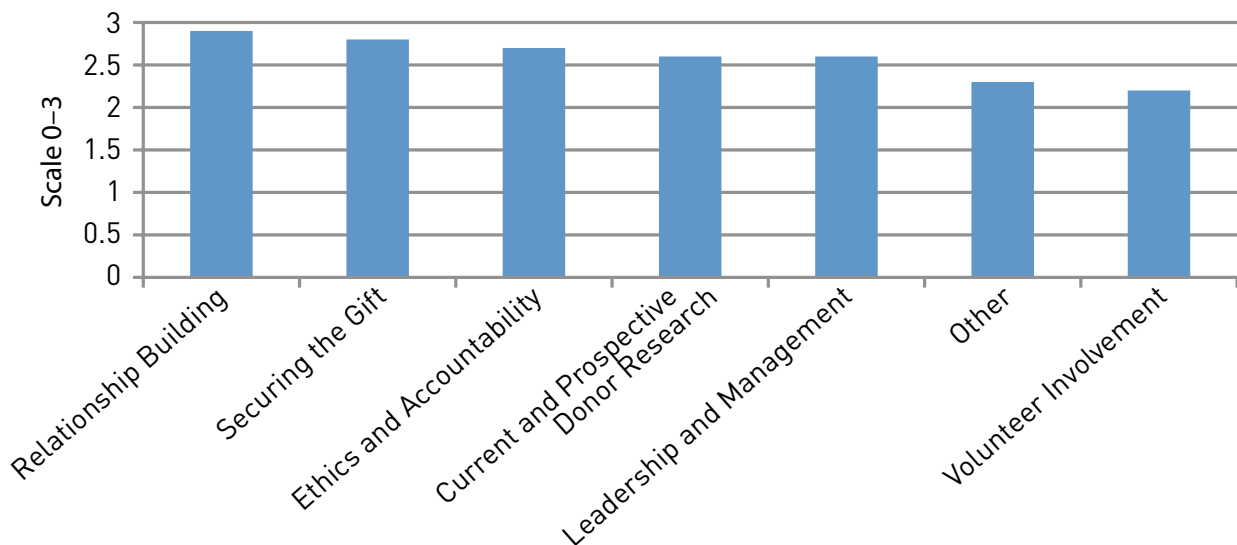
Established and emerging—one is not better than the other. We have much to learn from each other.

CFRE’s Test Content Outline

CFREI distills the results of the job analysis into the Test Content Outline. This is the blueprint of professional fundraising knowledge and of the CFRE examination.

The CFRE Test Content Outline, which is available to the public, is posted on the CFRE website (www.cfre.org). Fundraisers use the resource to prepare for the CFRE examination, but the Test Content Outline is also valuable for the development of job descriptions, recruiting and evaluation, and curriculum development.

Domain Importance Ratings



Source: 2009 CFRE Job Analysis Survey

CFRE’s Test Content Outline for 2011–2015 includes six key subject areas or domains:

1. Current and Prospective Donor Research
2. Securing the Gift
3. Relationship Building
4. Volunteer Involvement
5. Leadership and Management
6. Ethics and Accountability

Within these six domains are 32 identified fundraising tasks, supported by 108 knowledge areas needed in order to effectively perform the tasks.

The New Exam

The new form of the CFRE examination being released this summer has been refreshed based on results from the recent job analysis. The new exam reflects a shift in emphasis in three areas.

1. There is a greater emphasis on the relationship-building domain, which includes donor cultivation and communication strategies, recognition and constituency development, as well as promoting a culture of philanthropy.

The job analysis respondents said that relationship building was the most important aspect of their work and the one on which they spent the greatest percentage of their time. In fact, compared with the 2003 CFRE job analysis, the importance and frequency ratings for relationship building significantly increased.

Unfortunately, the job analysis does not tell us *why* certain shifts happen, so the curious are left to speculate. CFRE’s job analysis survey was conducted in 2009 in the middle of the worst economic downturn of a generation. Perhaps the increase in importance and time spent on relationship building was in response to heightened donor expectations of organizations or the need to sustain relationships during a time of economic stress.

2. The new exam increases the priority of ethics and accountability. In fact, this was the domain most commonly known and applied by all survey respondents: country-specific legal and regulatory requirements, appropriate gift acceptance and accounting standards, information protection and ethical practice.

As fundraisers, ethical and accountable practice is the bedrock of our credibility and the trust placed in us. We are increasingly under scrutiny by donors and regulators. What a wonderful message from our global profession to the world that we not only acknowledge ethics and accountability but also draw on and apply it more consistently than any other aspect of our practice.

3. The third shift reflected in the new version of the CFRE exam is in volunteer involvement. This domain includes knowledge and application of strategies for volunteer engagement, recruitment, ongoing training and management, and principles of governance.

Fundraisers Lead and Shape CFRE

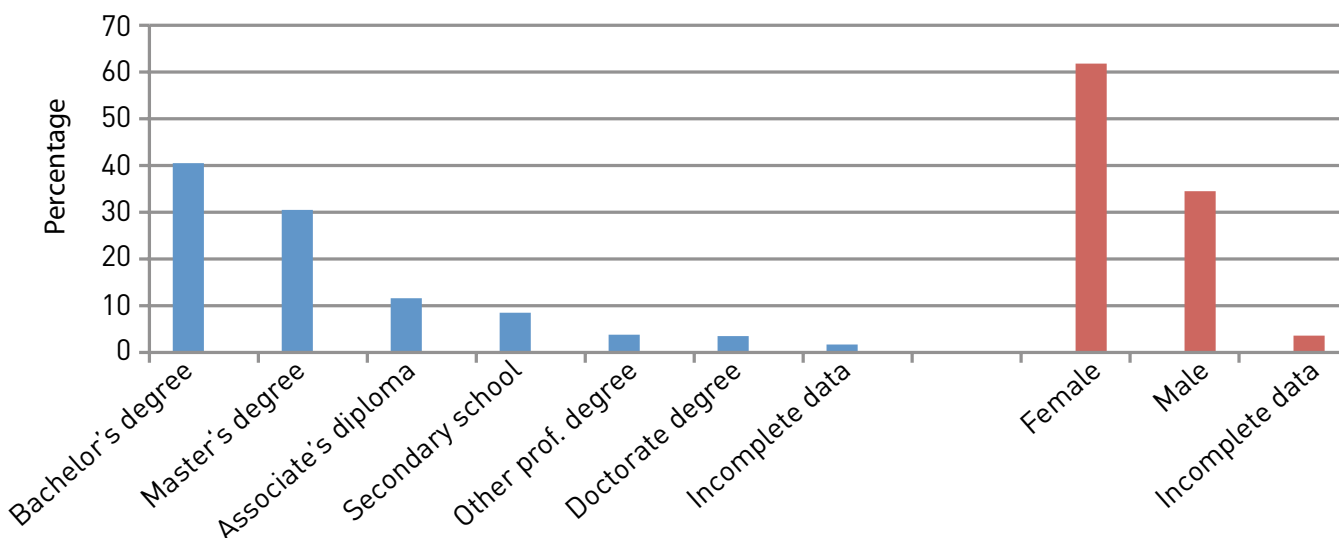
Volunteers are critical to CFRE’s core business and are thoughtfully selected to ensure a balanced representation of different types and sizes of organizations, demographics, as well as regions and countries. The CFRE job analysis is an example of a key initiative where more than 100 volunteer leaders in the field led, developed, tested, reviewed and analyzed various aspects of the project. This included the survey tool that was ultimately distributed to 3,000 fundraisers worldwide and the resulting data.

More broadly, at CFREI fundraisers serve as volunteers on the board of directors to help shape policies that support a strong credential. They also serve on committees to build awareness and collaborate among partners. With training and support, volunteers develop and review CFRE test questions and analyze the statistical performance of the examination to ensure it remains a valid and reliable testing tool. At CFRE, volunteers ensure it is the profession’s CFRE.

The following volunteers served on the 2009 CFRE Job Analysis Task Force:

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| Eva E. Aldrich, CFRE Associate Director The Fund Raising School Center on Philanthropy at Indiana University Indianapolis, Ind. United States | Sharilyn Hale, M.A., CFRE (chair) Director of Philanthropy YWCA Toronto Toronto, ON Canada |
| Julie S. Bornhoeft, CFRE Director of Development & Community Relations WEAVE Sacramento, Calif. United States | Nigel S. J. Harris, CFRE Executive Director Mater Foundation South Brisbane, Queensland Australia |
| Maretta F. Emery, CFRE Director of Development University of Manitoba Winnipeg, MB Canada | Richard Martin, CFRE Vice President, Advancement Lutheran Social Services of Michigan Detroit, Mich. United States |
| Alice Ferris, ACFRE Partner GoalBusters Flagstaff, Ariz. United States | J. A. Tony Myers, M.A., CFRE Principal and Senior Counsel Myers & Associates Calgary, AB Canada |
| Eric D. Grounds, CFRE Director of Fundraising Sue Ryder Care London, United Kingdom | Alisa M. Smallwood, CFRE Vice President of Development Center for Civil and Human Rights Partnership Atlanta, Ga. United States |

Respondents' Education Level and Gender



Source: 2009 CFRE Job Analysis Survey

This domain still rated as critical to effective fundraising but had a slightly lower prominence. The modest shift in emphasis could reflect an increasing reality for many fundraisers, namely that the role of volunteers in fundraising is decreasing in cases where organizations rely more on professional fundraising staff.

The shift in emphasis also could reflect the reality of fundraising in the regions where the profession is emerging (Brazil, Italy and Kenya). The predominant mix of fundraising techniques in these regions relies less on volunteers, and there are different governance and organizational structures and models in place.

These shifts in emphasis demonstrate that, as our work as professionals evolves, so, too, does our certification.

The Profession Looks Ahead

The final part of the job analysis survey invited respondents to share their opinions about CFRE certification and to describe the changes they anticipated would occur in the fundraising profession over the next five years. Here is some of what they shared.

The CFRE credential was affirmed as both important and beneficial. Ninety-seven percent of current CFRE and 80 percent of non-CFRE respondents agreed or strongly agreed that professional certification enhances the credibility of fundraising as a distinct profession. Forty percent said achieving their CFRE increased their compensation, and 49 percent said having the CFRE helped them get a promotion or new job.

They also indicated that the value of certification extends beyond the fundraising profession. Seventy five percent of the CFRE respondents indicated the credential was recognized and valued by their organizations, and 60 percent said their donors and board members recognized and valued the certification.

In addition to the importance of certification, many respondents expressed the need for more educational and training


opportunities specific to fundraising. In fact, across all countries respondents expressed concern about the availability of trained, experienced and talented fundraisers, even as they expected the profession to continue to grow.

Succession planning and mentoring were identified as critical factors in addressing this looming gap. At the same time, respondents were optimistic that an increasing range of educational options would become available.

Fundraising expertise is even more critical when times are tough. Many respondents noted the challenge of raising funds during a time of widespread economic downturn, anticipating that the impact on fundraising would be felt for the long term. In this context, respondents anticipated even more use and integration of technology, new media and social networking in fundraising activities, especially in donor cultivation, solicitation and stewardship. Many noted that fundraisers will need to increase their knowledge of these tools and vehicles to use them to greatest advantage.

Significantly, fundraisers said that their constituents and organizations had increasing expectations of accountability and transparency. Many respondents also expected government oversight and regulation of fundraising would continue to expand. What better time for our credential to be stronger than ever?

Our profession is growing and evolving, and so is our certification. CFRE matters, and CFRE is relevant. As we consider our global community of practice and the challenges and opportunities we face, we can draw on a shared body of knowledge and a certification that unifies us.

Fundraising is our profession, and CFRE is our credential. 

Sharilyn Hale, M.A., CFRE, is chair of the board of CFRE International (www.cfre.org) and also chaired the 2009 CFRE Job Analysis Task Force. An engaged AFP member, she is a fundraiser in Toronto.