

Demystifying the CFRE Examination

Angela Seaworth, ACFRE

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Competencies & Characteristics for Development Professionals

- Communications
- Interpersonal skills
- Writing
- Public relations
- Relationship building
- Listening
- Detail orientation
- Ability to multi-task
- Board governance
- Fundraising
- Training/Coaching
- Crisis management
- Volunteer management
- Coaching
- Expert on your programs
- Financial acumen
- Media relations
- Etc. Etc. Etc.

If you think it's practically impossible
to master all these areas and juggle
everything fundraisers are expected
to do every day...

try writing a question about it!!

How **DO** you test someone's mastery of relationship building and their knowledge of how to listen or of volunteer motivation?

Have experts identify specific:

- Skills
- Tasks necessary in our daily work
- Knowledge in these areas

Why Certify?

- Credibility
- Recognition
- Commitment
- Advancement
- Potential to increase earnings
- 21 leading philanthropic organizations endorse CFRE International and the certification process

** See the CFRE International website www.cfre.org for more reasons to certify.*

CFRE Basics

- Submit on-line application
(Which many people consider the toughest part!)
- STUDY
- Take Examination
- PASS and CELEBRATE!
- Vow to keep better track of your activities
- Recertify every three years

Becoming a CFRE

The CFRE process requires a comprehensive written application followed by a written exam. Individuals interested in the CFRE designation must meet all of the minimum eligibility requirements and pass the exam.

Steps:

- Obtain and complete an on-line application
- Submit application with a postmark of AT LEAST 60 days prior to a desired exam date and all necessary fees
- Applications are reviewed. If additional or clarifying information is needed, the candidate is contacted directly
- 30 days prior to requested exam date, candidates are sent an Authorisation to Test (ATT) Letter
- Make testing appointment via website
- Take exam
- If taking the Computer-Based exam, receive preliminary scores immediately. Otherwise, candidates are sent their scores directly from the Board's professional testing agency approximately four weeks after taking the exam.
- Approximately two weeks following the close of the testing window, candidates are sent official notification of their certification status.

(Refer to CFRE International's website www.cfre.org)

CFRE Application Sections

- Education – 80 points
- Professional Practice – 60 points*
- Professional Performance – 55 points
- Service – 55 points

** You have 8 years to satisfy this requirement, but all others must be met during the past five years. Please refer to CFRE website for definitions and scales to earn points.*

Why are there so many misspellings?

Please note: Because of the international scope of the certification programme CFRE International has chosen to use international spelling in accordance with the *Merriam-Webster International English Dictionary* (Third Edition) and therefore defaults largely to British spelling.

Inside the CFRE

- It is a criterion-reference exam model
(That means it is not graded on a curve and CFRE International does not predetermine the number of people who will pass)
- 225 multiple-choice questions
(25 are pretest questions for use on future exams. But like other standardized tests – these are not identified)
- Uses a scaled score of 200-800
- The passing score does not change each time the exam is administered – always 500.
- Your score does not depend on anyone you are testing with – you are competing with yourself!
- 29% increase in numbers applying to sit for the examination

Computer-Based Testing

Exam is offered four times a year, at testing centers, during 3-week testing windows

- Begins with a tutorial, so don't need to be extremely tech savvy
- Four hours to complete exam
- Questions appear one at a time
- You can move backward, forward, and mark questions so you can go back to them
- Can change answers up until final submission
- Test center will give you an erasable noteboard and pen; *cannot* take your own supplies for notes
- Small earplugs are allowed... if noise will distract you
- Tell the test center staff if there are technical problems
- Yes, you may take breaks throughout the exam

Can It Be That Hard?

- Most people feel like they failed when they leave the room (but the first-time passing rate is really 76%). With computer-based testing, you will have a preliminary score when you leave.
- Most common statement is the questions are so gray – all the answers are “it depends!”
- Questions are written generally so fundraising professionals can answer them, with care not to disadvantage candidates by focusing on one subsector of fundraising – education, healthcare, social services.

How Do I Pass?

- Study your own experiences
- Take online Study Wizard to help identify areas on which you can focus
- Review the test content!!!! Outline of the test content available on CFRE webpage
- Read some of the texts on the resource reading list
- Any educational activity on current fundraising practice will help prepare you

References are the true resources. The AFP/CFRE Review Course is not on the list because it is a secondary source. That said...

Prep Courses

Although CFRE International does not sponsor or endorse any review or preparation courses, some organizations have developed their own prep courses which may prove useful to your study.

- Association of Healthcare Professionals: **The Advanced Course in Health Care Fundraising**
- Association of Fundraising Professionals: **The CFRE Review Course**
- Council for Resource Development: **CFRE Content Review Course**
- CFRE International website: free Study Wizard

Note that most of these are fee based courses that are not designed by those who developed the CFRE exam.

Test Content (as of June 2011)

- Current and Prospective Donor Research – (16% - 32 Items)
- Securing the Gift (19% - 38 items)
- Relationship Building (27% - 54 items)
- Volunteer Involvement (8% - 18 items)
- Leadership and Management (18% - 36 items)
- Ethics and Accountability (11% - 22 items)
- These six areas were defined in an international study on fundraising job analysis. Professional Examination Services surveyed over 3,000 fundraisers worldwide, and this job analysis determined changes in test content.
- Compare these to your experience and specialties. Then focus on resource books that will better prepare you in these areas.

New Tasks Being Tested (as of June 2011)

Exam is placing more emphasis on Securing the Gift, Relationship Building and Ethics & Accountability

- “Presenting the list of current and prospective donors and relevant information to organisational leaders in order to establish consensus for action”
- “Engage volunteers in the fundraising process and related activities in order to expand organisational capacity”
- “Foster and support a culture of philanthropy across the organisation and its constituencies”
- “Ensure sound administrative and management policies and procedures to support fundraising functions”
- “Apply key principles of marketing and public relations to fundraising planning and programmes”
- “Clarify, implement, monitor, and honour donors’ intent and instructions, and ensure that allocations are accurately documented in the organisation’s records”

Dissecting the Exam Questions

- Written by people like me – Subject Matter Expert Corps
- Reviewed by 8 national experts
- Written with intent that anyone with 5 years experience could answer
- Broadly written to apply to numerous segments of fundraising profession
- Each has a stem
- Four options in multiple choice format

Three Types of Questions

- Direct Questions
- Incomplete Sentences
- Issue/Scenario Descriptions

Every question is reviewed to make sure it reflects current best practices and is referenced in materials.

Sample Question #1

In well-developed acknowledgement programmes, the MOST important goal of the recognition is to ensure the effort _____.

- A) promotes the organisation's mission
- B) recognizes donors tangibly
- C) convenes new donors annually
- D) provides social networking opportunities

Some Analysis

- Where does the question tell us to focus?
- Shouldn't you consider all these?

This is a question about relationship building. It is focusing on appropriate acknowledgement that is meaningful for your constituents and connects to the organization's mission. It looks at how to strengthen relationships with your organization.

Sample Question #2

A fundraiser managing a planned giving programme may find it effective to utilize _____ to communicate with this target audience.

- A) a newsletter
- B) email
- C) evening functions
- D) a gift society

More Analysis...

- What is this asking about?
- Are there clues or key words?

This question is about the value of communication in relationship building. It is concerned with the messages and methods one uses to reach target audiences.

Sample Question #3

When establishing a newsletter for the organisation, the fundraiser should be most concerned with:

- A) clear messages
- B) inspirational quotes
- C) professional photography
- D) color usage

Analyze That One

- Look for direction in the questions like establishing a newsletter, and start thinking about newsletters.
- Then see the clue – MOST CONCERNED

This question is also focusing on relationship building. It asks us think about how communications can help us build better relationships with donors and specifically focuses on the importance of writing skills and clear messages.

Last Question

An organisation is conducting a feasibility study and finds that a majority of those surveyed did not understand the organisation's mission. The MOST likely effect will be:

- A) to delay until review marketing and retest
- B) to launch the silent phase of the campaign
- C) to launch the campaign now
- D) to delay the campaign indefinitely

Final Analysis

- This was an issue/scenario description question
- It was focused on Securing the Gift with specific attention to the case statement and creating solicitation materials that will influence prospective donors

Problem Solving

Keep in mind that every question is going to focus on:

- one of the six main content areas
- some function of that area
- specific knowledge of that function

Trying to identify the main area will help you limit your focus and should help you select the correct answer, particularly on those “gray” and “impossible” questions.

Some Examples of Question Logic

- Management may have a question about strategic planning that is focused on the board's involvement and general organizational structure
- Securing the Gift may have questions about case statements and how you involved volunteers in that process
- Prospect research could have a question about prospect rating concerning donor profiles and the type of information you need to rate someone
- Accountability may have a question about gift acceptance policies and the use of data bases or record keeping

Resource Reading List

- Every question on the test must have at least two sources from the Resource Reading List.
- Strongly encourage you to strategically select a few of these books for review, but DO NOT try to read them all!!! It really won't help.

Some Favorites from the List

- Fundraising Basics: A Complete Guide
- Relationship Fundraising: A Donor Based Approach to the Business of Raising Money
- Fundraising Fundamentals
- The Complete Guide to Fund-Raising Management
- Prospect Research: A Primer for Growing Nonprofits

After You Pass

- Must recertify every three years
- You can request Inactive Status, for one recertification. That allows for gaps in employment and you only have to qualify in the educational area of the application
- If you do not recertify, you will have to take the exam again!

References

- CFRE International – www.cfre.org
- Association of Fundraising Professionals (AFP) – www.afpnet.org

*Do not underestimate the power of local mentoring!
AFP Chapters are supportive of their members.
Don't be afraid to contact someone in your local
chapter for help.*

Good Luck!

Thank you for your attention.

If you have questions regarding the CFRE or application process, feel free to contact me at seaworth@rice.edu

Please remember that this presentation was developed from my personal experience taking the CFRE exam and then learning to write questions for it. The presentation is not endorsed by CFRE International or any other professional organization.

Contact Us:

- Website: cpnl.rice.edu
- Phone: 713-348-6009
- Email: cpnl@rice.edu