

Contents



Cover

16 Leadership: A Position or Proposition?

The best fundraisers are leaders in the truest sense. Their leadership does not come from a position of power, however. It comes from a value proposition that their missions matter and merit investment.

Features

24 The Corner Office—Full Speed Ahead

How development directors are taking a leadership role through vision, resilience and commitment to mission

28 What's After Next?

How innovative chief executives use entrepreneurial techniques to lead and motivate their staff and volunteers to succeed

36 Change for the Better

How CFRE International's updated credential reflects the latest best practices

Departments

4 Chair's Message

Marathon Methods

7 Worth a Look

14 Inclusiveness

The Fellowship in Inclusion and Philanthropy Program

41 Research

Small Nonprofits *Can* Raise Major Gifts!

44 Your Career

Time Out!

48 Next Steps

Good Fellows

51 Fundraisers Without Borders

Leadership and Philanthroculture

55 Management

Time, the Avenger

57 Prospect Development

Maximum Capacity: Establishing Common-Sense Metrics and Deliverables for Prospect Research

62 Gift Planning

Building a Bridge Between the Hard and Soft Sides of Legacy Giving, for You and Your Donors

65 What's Working

Exceeding Expectations

70 Technology

Making the Most of Your Technology Palette

73 Communications

The Secret to Great Nonprofit Advertising

77 One More Thing

80 One-on-One

Cathy Cessna, ACFRE

Change



for the Better

How CFRE International's updated credential reflects the latest best practices

BY PAUL LAGASSE

Nothing ever remains the same, and the Certified Fund Raising Executive (CFRE) credential is no exception.

As part of a regular five-year review cycle, CFRE International (www.cfre.org) in Alexandria, Va., which oversees the CFRE credential, has updated application requirements and the test content outline in order to better address the needs of fundraisers and the philanthropic sector worldwide. The changes are evolutionary, not revolutionary, and reflect fundraising's growth as a maturing profession. "The changes we're seeing are not radical because fundraising as a profession hasn't changed radically since the test content outline was last updated five years ago," says Eva E. Aldrich, M.A., CFRE, president and CEO of CFRE International. While some of the changes may appear bold at first glance, she explains, they are actually simply subtle shifts in emphasis. "Don't think of it as moving from cold to hot. Think of it as adjusting the temperature of a room by a few degrees."

Aldrich says that many CFREs do not realize that the CFRE credential is the only accredited credential for fundraising professionals. As part of maintaining accreditation by the National Commission for Certifying Agencies, CFRE International undertakes a thorough review of the CFRE test content outline every five years to ensure that it continues to reflect contemporary fundraising best practices. In 2015, application require-

ments were reviewed and updated as well. The review process involves three groups working together: the CFRE International board of directors and two working groups, the job analysis task force and the exam committee. Each group brought a wealth of experience and wisdom to the task of ensuring that the CFRE credential will continue to serve CFRE International's vision of a world in which philanthropy is practiced in an environment of trust, respect and accountability.

Identifying Baseline Best Practices

CFRE International goes to great lengths to ensure that the test content outline is not only truly practice-based but also reflects the profession's current best practices. Critical to that process is an extensive international survey conducted by the organization's job analysis task force. The survey, which is distributed to thousands of fundraisers in North America and around the world, solicits information on what tasks fundraisers perform, how often the tasks are performed, the importance of the tasks to fundraising success and the knowledge used to perform the tasks.

Results of the survey (which is guided by psychometricians at the professional testing agency with which CFRE International partners in order to ensure test validity) are used as the basis for the test content outline, which reflects the base level of essential and relevant knowledge and experience that a fundraiser should have obtained af-

ter five years in the profession. The results of the survey were enlightening—and reassuring. “We find ourselves sensing that there are major shifts going on in the fundraising world,” says Marnie Hill, CFRE, vice chair of CFRE International and senior manager of legacy giving at the Canadian Red Cross (www.redcross.ca) in Victoria, British Columbia. “However, what came out of the survey was that, yes, there have been some shifts in the past five years, but they have been small.”

The shifts identified by job analysis research had mostly to do with the advent of new technologies, not with core principles of fundraising. “We had to constantly remind ourselves in our discussions that this review was about confirming current core knowledge indicated by contemporary fundraising practice,” Hill says, “and not anticipating future trends and tools that may or may not be around five years from now.”

Application Requirements Updated to Reflect the Current State of the Profession

The CFRE International board of directors includes senior fundraisers from around the world, including the United States, Canada, Germany, the United Kingdom, Australia and New Zealand. It was clear that, throughout the world, fundraising has matured as a profession since 1981, when the CFRE credential was founded, but application requirements had remained much the same.

Over the course of 18 months, the board tasked the exam committee with reviewing and updating application requirements to reflect the current state of fundraising as a global profession. The exam committee communicated multiple times, both in person and by phone, and invited leaders and experts to share their insights.

One of the critical issues that the board discussed early on was the requirement that applicants have a minimum of five years’ employment as a fundraiser before they can sit for the exam. Several fundraising experts expressed to the board their concern that this requirement could be unnecessarily restrictive in today’s career environment. “Young professionals coming into the sector today often have a formal education in

development and nonprofit management that was simply not available when the credential was first established in 1981,” explains Phil Schumacher, CFRE, ACFRE, chair of CFRE International and recipient of the Association of Fundraising Professionals’s (AFP’s) prestigious Founders Medallion in 2012. “There has also been an increasing number of people who come to fundraising later in their careers and who have attended workshops, conferences, symposia and classes in fundraising. Many of these individuals have significant education and transferable experience that accelerates their understanding of best practices in ethical fundraising.”

To enable the CFRE credential to better address the current state of the profession, the board explored the concept of allowing fundraisers to sit for the exam after gaining three years’ experience instead of the traditional five. Schumacher says that the exam committee and board members worked together closely over the course of several meetings to hammer out the details. “It’s important to know that at no time did the board discuss changing exam requirements,” he emphasizes. “The CFRE exam continues to test baseline knowledge in ethical fundraising at the five-year level of experience. My goal was to make sure there was thorough discussion and a strong consensus for updating application requirements to reflect a minimum of three years of professional practice so that extremely well-qualified candidates have an accelerated pathway to the CFRE credential.”

Once the board reached a consensus on the updated professional practice requirement, it floated the idea at CFRE International’s Advisory Council Conference, which brought together key leadership representing CFRE International’s 22 participating organizations. The conference in March 2015 was attended by fundraisers from the United States, Canada, Australia, New Zealand, Germany, Austria and Kenya. The response to the proposal was overwhelmingly positive. Based on that feedback, the board made what Schumacher deems “a very astute decision” to offer the three-year professional practice requirement beginning in 2016.

Schumacher stresses that the updated three-year professional practice requirement is not an attempt to

The **shifts identified by job analysis research** had mostly to do with the **advent of new technologies**, not with core principles of fundraising.

Another change that was made to **reflect the differences in philanthropic environments worldwide** has to do with volunteer service.

“water down” the credential. The exam will still test knowledge at the five-year level, and the education and professional performance requirements remain the same. Rather, the updated professional practice requirement is designed to provide highly qualified professionals with another avenue of access to the credential. “We don’t encourage people to take the test before five years,” Schumacher says. “But if they believe that they have the requisite experience and wisdom, they can now take it at 36 months. They just do so at their own risk.”

Serving the Needs of Fundraisers Around the Globe

In addition to the updated professional performance requirement, there are several other changes that acknowledge and attempt to provide equity across the many and varied environments in which fundraisers operate around the world. For example, the professional performance category “Actual Funds Raised” includes the following changes:

- One point will now equal the equivalent of US\$25,000 raised, rather than 25,000 units of the local currency.
- Applicants working in countries that are not members of the Organization for Economic Cooperation and Development (OECD) will receive an “economic equivalency adjustment” of an additional point for each US\$25,000 raised.

In light of currency fluctuations that may affect “Actual Funds Raised” point totals, it is important to note that fundraisers can also count communications and management projects that directly support fundraising to fulfill their professional performance requirement.

Another change that was made to reflect the differences in philanthropic environments worldwide has to do with volunteer service. Formerly its own category, volunteering is now classified as service learning in the “Education” category. Applicants can count up to 10 points of service learning in this category.

To North American fundraisers, in particular, this last change may seem to suggest that volunteer service—a

staple practice of fundraising in that part of the world—has been devalued in the new application requirements. However, that is not the case, says Leo Orland, FFIA, CFRE, chair of the CFRE International exam committee and account director at Robejohn & Associates (www.robejohn.com.au) in Melbourne, Australia. “CFRE International continues to value and encourage volunteer service. We wanted to still keep volunteer service, but we felt it disadvantaged fundraisers in areas of the world where extensive volunteer service is not as common or where a variety of formal volunteering opportunities are not as readily available,” he explains. Orland points out that in many parts of the world, fundraisers do not have the same opportunities as their North American colleagues to serve on boards or committees as a matter of course.

The exam committee, which thoroughly vetted the application requirements and recommended changes to the board for approval, was sensitive to changes aimed at the global community of fundraisers in part because its seven members hailed not only from the United States and Canada but also from Australia, New Zealand and Germany. “The application requirements have not changed much since the credential was founded in 1981,” Orland says, “but a lot has changed for CFREs since then. And the environment in which fundraisers come into the profession is also very different. We felt the application requirements needed to be reviewed in the context of these changes.”

Pegging the point value for funds raised to a uniform currency, for example, provides greater equity because of the wide variation in base currency units around the world. The effort required to raise 25,000 Japanese yen (equivalent to approximately US\$210) and 25,000 British pounds (approximately US\$38,250) is very different, Orland notes. Likewise, the committee’s decision to allow fundraisers in OECD nonmember countries to claim an extra point was approved only after much deliberation in an effort to identify an equitable balance for fundraisers operating in countries without a well-established philanthropic culture or abundant donors. “With this revision, we’re acknowledging that

Ultimately, this is really about better supporting fundraising professionals and growing the philanthropic sector, which is a key pillar of civil society.

the CFRE credential is an international accreditation and that it is continuing to grow,” Orland says. “We can’t, and we don’t want to, stay where we have been. We’re adapting to the needs of today’s international community of fundraisers while at the same time making sure that the credential honors its history and maintains the same quality that it has always had.”


Poised to Expand

As CFRE International seeks to broaden best practices in ethical fundraising by maintaining the strength of the credential in North America and expanding access to the credential in other parts of the world, the CFRE credential promises to serve as a kind of skills passport for all fundraisers, whether they are working locally, nationally or internationally. “For credentialing to be truly successful, it has to be structured to fit a very

broad range of educational experience,” says Andrew Watt, FInstF, president and CEO of AFP (www.afpnet.org) in Arlington, Va. “The exam and the core body of knowledge must provide the flexibility to recognize and accredit a very broad range of educational opportunities for individual fundraisers no matter where they are.”

This dual mission—maintaining a credential that is both deeply rooted in established practice and also highly portable for today’s mobile professional workforce—is the real challenge facing the CFRE credential today and into the future, Watt explains. He notes that the nature of globalization is such that young fundraisers are more likely to spend at least part of their careers working overseas than previous generations did. That is why he is particularly enthusiastic about the updated three-year professional practice requirement for highly qualified, early-career fundraisers. “I think it’s essential,” Watt says. “People coming out of college today have a clear understanding of the role of nonprofits and theoretical knowledge of nonprofit management fundraising, and they struggle with the idea of having to wait five years.”

Watt adds that the profession has been experiencing significant turnover in people under the age of 30 and is hopeful that the changes introduced to the CFRE application requirements will help reduce the drain of young talent.

Aldrich agrees. Along with her colleagues on the board of directors, the job analysis task force and the exam committee who have labored hundreds of hours to refine the CFRE exam, she believes that the changes reflect an incremental step toward more closely achieving CFRE International’s guiding mission and vision. “Every year, I have the incredible privilege of attending fundraising conferences around the world,” Aldrich says. “And wherever I go, fundraisers are talking about the same things and working on the same issues. We are more alike than we are different. Ultimately, this is really about better supporting fundraising professionals and growing the philanthropic sector, which is a key pillar of civil society.” 

Paul Lagasse is a freelance writer in La Plata, Md. (www.avwrites.com).

How Do Changes to the CFRE Affect Me?

Updates to CFRE application requirements and the test content outline reflect recent incremental changes in the fundraising profession. If you are currently seeking certification and have used the former test content outline to prepare for the exam, you will still be well prepared to take the exam in 2016 under the new test content outline. And if you had previously qualified for certification under the former application requirements, you will still qualify under the new application requirements.

To view the new test content outline and updated application requirements for initial certification and recertification, visit www.cfre.org/resources/2016-cfre-programme-updates.