



**CFRE International**

Certifying fundraising executives  
Setting standards in philanthropy



The CFRE Exam:  
Setting Yourself Up for Success

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# Agenda

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- How the exam is created
- Success rates on portions of the exam
- Tools to help you study
- How to create your study plan
- How to assemble a study group
- How to request an accommodation
- The night before the exam
- Overcoming test anxiety
- What to expect on exam day



# How the exam is created

- CFRE Exam Committee meets bi-annually
- Questions are applicable to fundraisers no matter where in the world they work
- Exam is in English, using universally understood fundraising terms
- New questions added annually

# About the exam

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- 200 questions in total
- 25 are test questions that won't count towards your score
- Scores: 200 – 800
- Passing score: 500
- Average passing rate of all test-takers: around 70%
- Not graded on a curve



# Six Knowledge Domains

Topic	Number	Percentage of Exam
Current and Prospective Donor Research	28 Items	14%
Securing the Gift	46 Items	23%
Relationship Building	52 Items	26%
Volunteer Involvement	16 Items	8%
Leadership and Management	38 Items	19%
Ethics, Accountability, and Professionalism	20 Items	10%

# Breakdown of a question

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1. What considerations must be made when accepting a non-cash gift (securities, property, etc.)
  1. The likelihood of the property being sold for cash.
  2. The value of the gift and tax implications of accepting it.
  3. The gift's appropriateness relative to the organization's gift acceptance policy.
  4. The timing of the gift relative to the annual campaign.

# Getting started

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- Mindset
- Knowing what to study
- Knowing how to study
- Preparing a study plan
- Developing a study schedule
- Know the vocabulary
- Get a study partner/Join a study group
- Know what study notes make a difference
- Know how to use practice exams

Most  
important:  
Your  
mindset



Studying is:

- a) A dreaded task
- b) A new opportunity to learn and keep my skills sharp

**Research shows your frame of mind when studying can play a strong role in how effective your studying is.**

Think positively  
when you study.

Remind yourself of  
your skills and  
abilities.

Avoid catastrophic  
thinking.

Don't compare  
yourself with  
others.

Your skills and  
abilities are unique  
to you, and you  
alone.

Improve your study mindset

Studying:  
You got this!

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Getting started is the  
hardest part. Mapping  
out the journey helps!

# Knowing what to study

- Honestly evaluate your strengths and weaknesses
  - Review Test Content Outline
  - What are you most comfortable with? Most experienced with?
  - Practice Exam
  - The exam focuses on best practices, not rote memorisation of facts

# Breakdown of Knowledge Domains



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## I. Current and Prospective Donor Research (14% of total scored items)

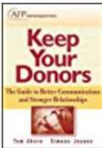



1. Develop a list of prospective donors by identifying individuals, groups and entities, such as foundations, corporations, and government agencies, with the linkage, ability, and interest to give in order to qualify prospective donors for further research and cultivation.
2. Implement and utilise a secure data management system to ensure data privacy, store information on current and prospective donors, and enable segmented retrieval and analysis.
3. Collect and analyse current and prospective donor information including demographics, psychographics, interests, values, motivations, culture, ability, giving and volunteer history, relationships, and linkages to select potential donors for particular projects and fundraising programmes.
4. Rate current and prospective donors on linkage, ability, and interest to prioritise and plan cultivation and solicitation.
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 THE ABOVE TASKS:

- + Indicators that identify trends and define characteristics such as socioeconomic status, giving history, generation, gender, and cultural of a constituency
- + Donor acquisition and retention principles
- + Sources and 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

# Resource Reading List

- Pick books from Resource Reading List based on which knowledge domains they address
- Borrow books from library or new CFREs
- Request employer to purchase for your team
- Divide and conquer with others in your study group

Link to Book	Title	Knowledge Domains Addressed
	Keep Your Donors (2008) by Tom Ahern and Simone Joyaux	KD1, KD2, KD3, KD6
	Fund Raising Basics (2009) by Barbara L. Cicone and Jeanne Jacob	COMPREHENSIVE KD1, KD2, KD3, KD4, KD5, KD6
	Developing Major Gifts (2006) by Laura Fredricks	KD2, KD3
	Beyond Fund Raising (2nd ed.) (2005) by Kay Sprinkel Grace	KD1, KD2, KD3, KD4, KD5

# Knowing How to Study

- Develop a timeline:
  - 8-week
  - 12-week
  - 16-week
  - Longer if needed
- Plan to study when:
  - Not stressed by work or personal life
  - Can carve out the time (see CFRE tip sheet on Overcoming Distractions to Study)



# Prepare a study plan

- Pick days of the week and a set time each of those days
- Determine which Knowledge Domains require most focus
- Select which books you will read
- Set yourself a page goal each week (e.g., 50 pages/week)
- Select a quiet, calm area to study
- Don't study at home if easily interrupted or distracted

# Example study schedules: #1

**Two hours a day for four days per week**

- **Week 1:** Current and Prospective Donor Research
- **Week 2:** Securing the Gift
- **Week 3:** Relationship Building
- **Week 4:** Volunteer Involvement
- **Week 5:** Leadership and Management
- **Week 6:** Ethics, Accountability & Professionalism
- **Week 7:** Review weakest knowledge domain again
- **Week 8:** Review any areas have had least professional experience with

## Example study schedules: #2

### Two hours a day for two days per week

- **Weeks 1 & 2:** Current and Prospective Donor Research
- **Weeks 3 & 4:** Securing the Gift
- **Weeks 5 & 6 :** Relationship Building
- **Weeks 7 & 8:** Volunteer Involvement
- **Weeks 9 & 10:** Leadership and Management
- **Weeks 11 & 12:** Ethics, Accountability & Professionalism
- **Weeks 13 & 14:** Review weakest knowledge domain again
- **Weeks 15 & 16:** Review any areas have had least professional experience with

# Know the vocabulary: Glossary

**accountability** The responsibility of the donee organization to keep a donor informed about the use that is made of the donor's gift as well as the cost of raising it.

**acknowledgment** Written expression of gratitude for gift or service.

**acknowledgment letter** A letter sent by a donee, or on behalf of a donee, to the donor, expressing appreciation for a gift and identifying the use that will be made of the gift. An acknowledgment letter may be a form letter, but it is usually personalized.

**acquisition mailing (or prospect mailing)** A mailing to prospects to acquire new members or donors.

**advance gifts** Gifts given or pledged in advance of a public announcement of a campaign. Advance gifts are solicited before a campaign is announced because the success or failure of a campaign may depend on the size of the advance gifts.

**advisory board** A group of influential and prominent individuals whose association with a development program is calculated to lend luster and implied endorsement of the program's goals and objectives.

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# Tips from India Alexis Ehioba, CFRE

1

As you study, **make note of the activities and procedures you are already doing** that are “spot on” with CFRE best practices.

2

**Pat yourself on the back** and write in your notes that you already know and practice that CFRE content area.

3

The more you reinforce the knowledge and success that you have already achieved, **your confidence for the exam will grow.**

Heather  
McGinness'  
preparation:  
What worked  
for me

Practice Exam

Resource Reading List

Flash Cards

# Taking the exam

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- Don't panic!
- Read carefully
- Flag any questions you are unsure about
- Don't panic!

# Study groups

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“[Studying] got easier as the exam got closer because I knew I needed to do it.

**The study group was really useful** as it gave me deadlines that I had to meet, so if you’re not good at maintaining a study schedule I recommend a little bit of external pressure.”

- Cara Morrison, CFRE

# Find people to start a study group with

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- In-person or virtual (Skype, GotoMeeting, Zoom)
- Check CFRE study group page.
- Join CFRE LinkedIn group. Once you join, you can create a post letting people know you are putting together a study group.
- Post to your personal LinkedIn page.
- Regional chapter of your professional organization's Facebook or LinkedIn page.
- Ask local professional organization to put announcement in newsletter.

# Study group formats

- Decide how often to meet and at what time
- Determine who is a subject matter expert in what area
- SMEs can consider doing small presentations to rest of group
- Each person can make flashcards on their SME area and then share with rest of group
- Don't need a minimum number of people
- Share books
- Be each other's cheerleaders

# Know what study notes make a difference

- Write notes to boil down complex processes
- Take note of new concepts/unfamiliar topics
- Note newly learned terms and definitions
- Take actual notes, don't just highlight passages



# CFRE Practice Exam

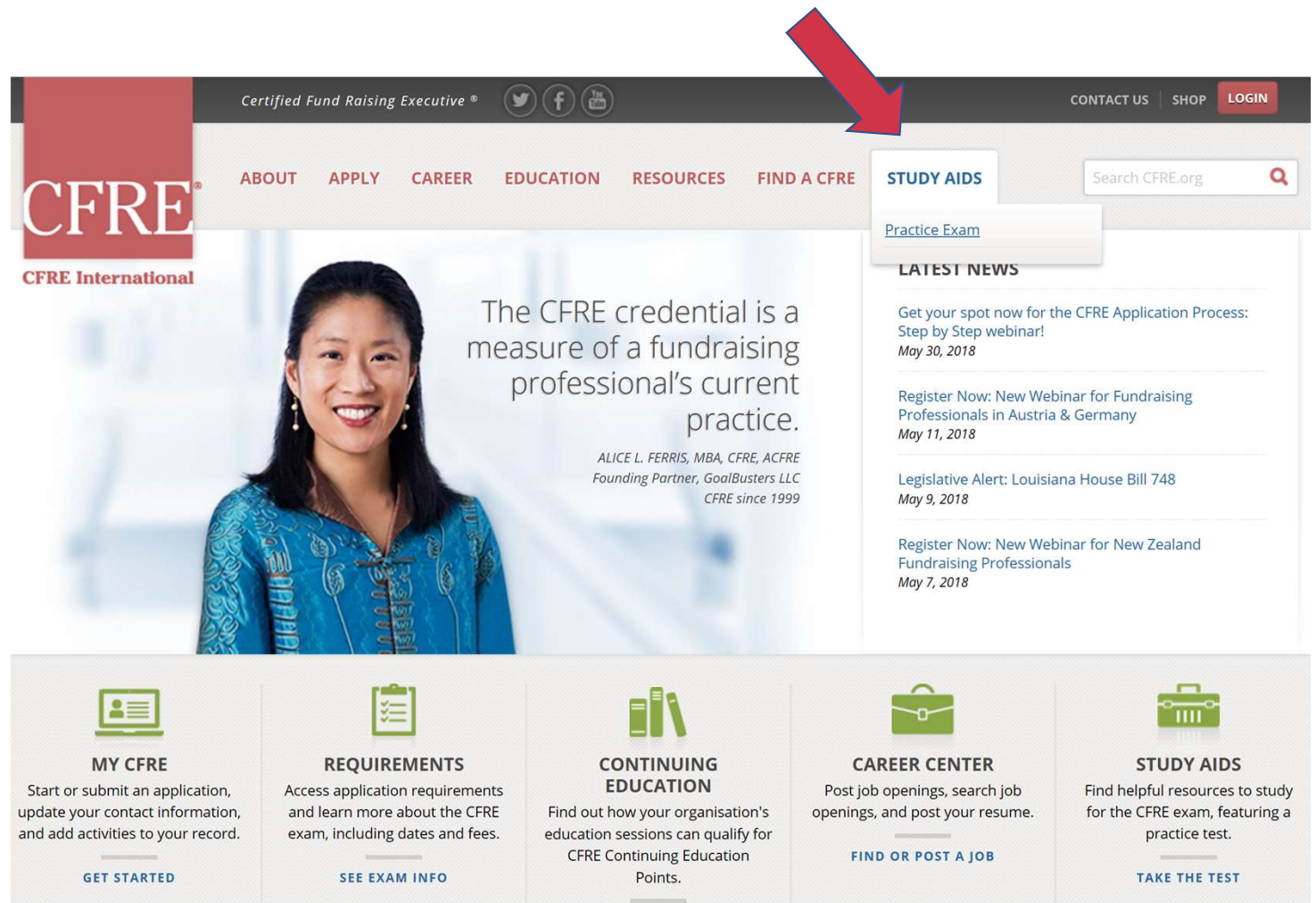
Subscription-based

\$59.95/30 days

\$99.95/90 days

No Practice Exam question appears on actual exam

Identify strengths and weaknesses



The screenshot shows the CFRE International website. At the top, there is a navigation bar with the text "Certified Fund Raising Executive" and social media icons for Twitter, Facebook, and YouTube. On the right side of the navigation bar, there are links for "CONTACT US", "SHOP", and "LOGIN". Below the navigation bar, there is a search bar with the text "Search CFRE.org" and a magnifying glass icon. The main content area features a large image of a smiling woman, Alice L. Ferris, with the text "The CFRE credential is a measure of a fundraising professional's current practice." and her name and title: "ALICE L. FERRIS, MBA, CFRE, ACFRE Founding Partner, GoalBusters LLC CFRE since 1999". To the right of the main content, there is a "STUDY AIDS" dropdown menu with a red arrow pointing to it. The dropdown menu is open, showing a link for "Practice Exam". Below the dropdown menu, there is a "LATEST NEWS" section with three news items: "Get your spot now for the CFRE Application Process: Step by Step webinar! May 30, 2018", "Register Now: New Webinar for Fundraising Professionals in Austria & Germany May 11, 2018", and "Legislative Alert: Louisiana House Bill 748 May 9, 2018". At the bottom of the page, there is a footer with five columns of content: "MY CFRE" (Start or submit an application, update your contact information, and add activities to your record. GET STARTED), "REQUIREMENTS" (Access application requirements and learn more about the CFRE exam, including dates and fees. SEE EXAM INFO), "CONTINUING EDUCATION" (Find out how your organisation's education sessions can qualify for CFRE Continuing Education Points.), "CAREER CENTER" (Post job openings, search job openings, and post your resume. FIND OR POST A JOB), and "STUDY AIDS" (Find helpful resources to study for the CFRE exam, featuring a practice test. TAKE THE TEST).

# Request an accommodation

- Happy to make reasonable accommodations.
- Complete the Request for Special Accommodations form with a letter from a licensed physician, optometrist, social worker, psychologist, etc.
- Letter must describe nature of the limitation as it applies to taking a standardised, multiple-choice exam and specific accommodations needed.
- If approved, accommodations provided at no charge to candidate.
- Requests must be made at time of application, and no later than sixty (60) days prior to desired exam date.



# The night before

- Don't cram
- Get eight hours of sleep
- Know your route to the test centre and if you will need money for parking
- Think positively
- Plan your morning so you will arrive 45 minutes before scheduled test time
- Plan to eat a full breakfast

# Test anxiety

- Nerves are normal, test anxiety is much more
- The fear that if you aren't successful, there will be negative consequences
- May cause people to put off taking an exam

# Beat test anxiety

- Adequately prepare
- Forget negative past test experiences – today is a new day!
- You're wiser and more experienced now than last time you took a test
- Read every question thoroughly on exam day
- You have four hours!

# CFRE Examination

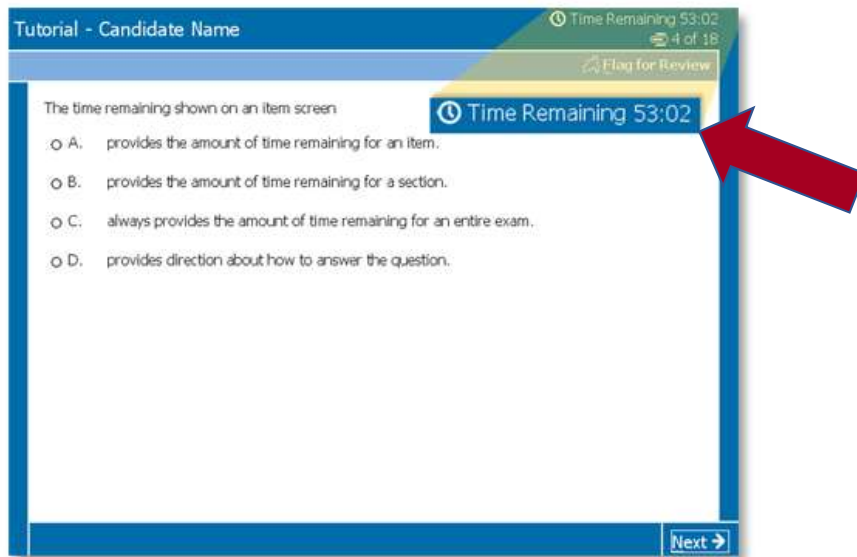
You could  
take the exam  
here!



**Time Remaining**

At any point in a timed section, you can see how much time remains for that section in the upper, right corner of the screen. If you do not want to view the time remaining during an exam, click on the clock icon to hide this information. When there is less than five minutes remaining for an exam section, the time remaining will display in yellow as a warning that time is about to expire.

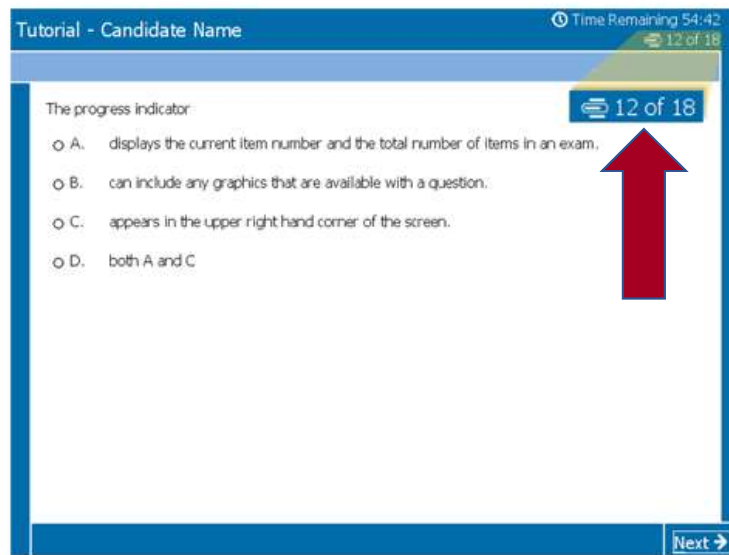
When time expires, a warning message appears. Click **OK** to close the warning message. The current section will end and the next section of the exam will be displayed automatically.



Select the **NEXT** button to continue.

### Progress Indicator

As you navigate through an exam, you can pace yourself by referring to the progress indicator in the upper, right corner of the screen. The progress indicator includes the current item number and the total number of items in the section. The progress indicator can be collapsed and expanded by clicking on the progress indicator icon.



The screenshot shows a tutorial window titled "Tutorial - Candidate Name". In the top right corner, it displays "Time Remaining 54:42" and "12 of 18". Below this, a progress indicator shows "12 of 18" with a small icon to its left. A red arrow points to this indicator. The main content area contains a question: "The progress indicator" followed by four multiple-choice options: A. displays the current item number and the total number of items in an exam., B. can include any graphics that are available with a question., C. appears in the upper right hand corner of the screen., and D. both A and C. At the bottom right of the window is a "Next" button with a right-pointing arrow.

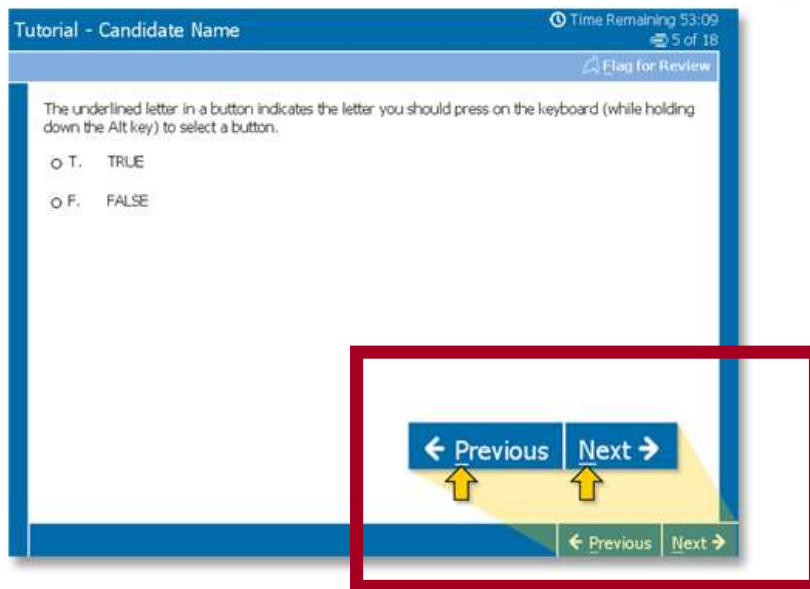
Select the **NEXT** button to continue.

**Navigation**

Notice the **NEXT** button in the lower, right corner of this screen. This button will be available throughout your exam. Select the **NEXT** button to move from one screen to the next screen. In addition, a **PREVIOUS** button will be available when you are allowed to move from one screen to the previous screen.

Buttons can be selected by using either the mouse or a combination of keys on your keyboard. For example, to select the **NEXT** button, you can press the **N** key on your keypad while simultaneously holding down the **Alt** key.

Note: If you select buttons by using the keyboard rather than the mouse, the letter underlined on a button indicates the letter to press on the keyboard to select that button. Please note that the underlined letter must be pressed while simultaneously holding down the **Alt** key.



Select the **NEXT** button to continue.

# Exam day: What to expect

- Upon arrival, you will go through the admissions process.
- Bring two forms of government-issued ID. One must bear your signature and photo. Name on ID must exactly match your Authorization to Test (ATT) letter.
- Wear layers.
- All sites have water coolers.

# Exam day: What to expect

- Can leave room to get a drink or use restroom.
- Given scratch paper or small white board for notes.
- Other people in the test center will be taking a variety of other exams.

Exam day:  
Not permitted in  
testing area

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- Books
- Food or drink
- Calculators
- Papers
- Reading materials
- Cell phones

## Once You Finish

- Score appears immediately.
- Upon receiving a copy of your scores, CFRE International e-mails final certification determination.
- Successful candidates receive official certification letter and certificate for framing.
- Unsuccessful candidates receive further instruction as to options for proceeding (must wait 30 days to re-test).

# Questions?

[Succeed@cfre.org](mailto:Succeed@cfre.org)



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