

# AFP SUMMER INSTITUTE 2009

Charleston, SC  
CFRE

Timothy M. Winkler Sr., CFRE

Principal/Managing Partner, Winkler Consulting Group

[Tim@WinklerConsultingGroup.Com](mailto:Tim@WinklerConsultingGroup.Com)

[www.WinklerConsultingGroup.com](http://www.WinklerConsultingGroup.com)

# Welcome

The CFRE Examination is intended to assess your mastery of the body of knowledge required to perform fundraising tasks. The knowledge and tasks that are being tested are based on current fundraising practice – or what tasks professionals perform on the job.

# Why?

- Ethics
- Donor Bill of Rights
- CFRE Code of Conduct

# Benefits

- National Trend

4,527 CFRE Certificants in the US

- Credibility

- Earning Potential

In US, CFRE Certificants earn 17% more than their counterparts.

Average CFRE Salary \$85,032

- Professional Development

# Application Process

- File Diving
- Application Steps
  - Education · Professional Practice
  - Professional Performance · Service

<http://www.cfre.org/>



“One important key to success is self confidence. An important key to self confidence is preparation.”

# Preparing for the Test

- Time
- Study Groups
  - AHP, AFP, CRD offer review programs for the exam
- Focus on Areas of Weakness
  - CFRE Study Wizard
- Resource Reading
- Pre-Test

New Way

Old Way

- Methodology
- Designed for 5 Years of Experience

# Test Content

225 multiple-choice questions

4 Hours

- I. Relationship Building (25%)
- II. Management (20%)
- III. Securing the Gift (18.5%)
- IV. Current & Prospective Donor Research (16.5%)
- V. Volunteer Involvement (10.5%)
- VI. Accountability (9.5%)

# Appendix

- Donor Bill of Rights
- AFP Code of Ethical Principles

# Donor Bill of Rights

- To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purpose.
- To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
- To have access to the organization's most recent financial statements.
- To be assured their gifts will be used for the purpose for which they were given.
- To receive appropriate acknowledgement and recognition.
- To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by the law.

# Donor Bill of Rights

- To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
- To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.
- To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
- To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.

# Code of Ethical Principles

- Practice their profession with integrity, honesty, truthfulness and adherence to the absolute obligation to safeguard the public trust;
- Act according to the highest standards and visions of their organization, profession and conscience;
- Put philanthropic mission above personal gain;
- Inspire others through their own sense of dedication and high purpose;
- Improve their professional knowledge and skills, so that their performance will better serve others;
- Demonstrate concern for the interests and well being of individuals affected by their actions;
- Value the privacy, freedom of choice and interests of all those affected by their actions;
- Foster cultural diversity and pluralistic values, and treat all people with dignity and respect;

# Code of Ethical Principles

- Affirm, through personal giving, a commitment to philanthropy and its role in society;
- Adhere to the spirit as well as the letter of all applicable laws and regulations;
- Advocate within their organizations, adherence to all applicable laws and regulations;
- Avoid even the appearance of any criminal offense or professional misconduct;
- Bring credit to the fundraising profession by their public demeanor;
- Encourage colleagues to embrace and practice these ethical principles and standards of professional practice; and
- Be aware of the codes of ethics promulgated by other professional organizations that serve philanthropy.

“When we do the best we can,  
we never know what miracles  
may result.” Helen Keller

**CFRE™**

**1981–2006**

**25th Anniversary of Fundraising Certification**

**GET THE RECOGNITION YOU DESERVE**

**<http://www.cfre.org/>**