



# **INSTRUCTION PACKET**

## **ADVANCED CERTIFIED FUNDRAISING EXECUTIVE (ACFRE) PROFESSIONAL CERTIFICATION PROGRAM**

Address inquiries to:  
ACFRE Program  
4300 Wilson Blvd., Suite 300  
Arlington, VA 22203  
703/794-2178  
[info@acfre.org](mailto:info@acfre.org)

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# **ADVANCED CERTIFIED FUNDRAISING EXECUTIVE (ACFRE) PROGRAM**

*of the Association of Fundraising Professionals*

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**To obtain a copy of the ACFRE application form in Microsoft Word format, visit [acfre.org](http://acfre.org)**

## Advanced Certified Fund Raising Executive (ACFRE) Program of the Association of Fundraising Professionals

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### Eligibility Requirements

1. Currently working in the profession at the time of application. (*Explain any special circumstances in a separate letter and attach to the application.*)
2. Currently holds Certified Fundraising Executive (CFRE) credential, current Fellow, Association for Healthcare Philanthropy (FAHP), or International Advanced Diploma in Fundraising (IADF), or minimum of 20 years of full-time professional experience in fundraising.
3. Adherence to the AFP Code of Ethical Standards and the Donor Bill of Rights.
4. Minimum of ten years full-time professional experience in the fundraising field from date of application or 15 years of other professional experience. (*If this criterion is not yet met at the time of application, it will not be approved.*)
5. BS/BA degree or equivalent experience.
6. Participation as an attendee or instructor within the previous five years (from date of application) in at least 15 contact hours of advanced organizational **management** seminars and/or courses.
7. Participation as an attendee or instructor within the previous five years (from date of application) in at least 15 contact hours of advanced organizational **leadership** seminars and/or courses.
8. Participation as an attendee and/or instructor within the previous five years (from date of application) in at least ten (10) contact hours of advanced **ethics** courses.
9. Academic Courses and/or Writing for the Profession may be considered.
10. Membership and active participation in a field-related professional organization, with demonstrated volunteer service to not-for-profit organizations.

*The candidate must fulfill all eligibility requirements prior to submitting the application.*

### Major Program Components

The entire ACFRE program must be completed within two (2) years of the date that the ACFRE Certification Board accepts an application. A candidate may request one one-year extension to his/her “calendar” at any time during the process. Upon completion of the four sequential components outlined below, the ACFRE Certification Board confers upon candidates the designation of Advanced Certified Fundraising Executive (ACFRE).

#### 1. Application

Submit a completed Advanced Certification application, including current resume and confirmation of current certified status. Applications must include payment of \$400 application fee. Applications must be typed or legibly printed and entered only on the application form. Computer-generated forms are acceptable but must follow the original form. Two peer recommendations are required in addition to the application. The application form is available at [www.afpnet.org](http://www.afpnet.org).

#### 2. Portfolio

When the ACFRE Certification Board accepts an application, individuals become candidates for Advanced Certification and may submit a portfolio. A portfolio consists of materials that document the candidate's professional performance during the past five years (from date of Portfolio submission). These materials include a planning document, a case statement, and two examples of competency in each of the following: writing, creativity, management, and teaching/ training (a total of ten documents). Two copies of the portfolio must be submitted within one year of the approval of the application, and the submission must include payment of a \$400 portfolio fee. Candidates whose portfolios are approved by the ACFRE Board become eligible for the written exam.

#### 3. Written Examination

The written exam must be taken within one year of approval of the portfolio. Registration for the exam must include payment of the \$400 exam fee. Candidates who achieve a passing grade on the examination become eligible for the oral peer review.

#### 4. Oral Peer Review

Registration for the oral peer review must include payment of the \$400 review fee. Oral peer reviews take place through special arrangement, e.g., at the AFP International Conference or Leadership Academy. Candidates are expected to demonstrate to the review panel mastery of advanced knowledge and understanding, both theoretical and practical, in the broad field of fundraising and in two of the candidate's specialty areas. Within that framework, candidates' responses will address fundraising ethics, management, leadership, planning, and problem solving.

## Identifying Advanced Courses for ACFRE Credit

The ACFRE (Advanced Certified Fundraising Executive) credential is awarded to fundraisers with at least 10 years experience, who have already demonstrated competence in fundraising practice through attainment of the CFRE, the FAHP, or the IADF. To achieve the ACFRE, a candidate must demonstrate advanced understanding and competence in management, leadership, and ethics.

### ACFRE Application Requirements

The ACFRE process begins with an application documenting that all eligibility requirements have been met. For the Continuing Education requirement, the applicant must document 15 hours of continuing education activity in each of the management and leadership areas, plus an additional ten contact hours in ethics, for a total of 40 hours, within the five years prior to the date of application submission.

A minimum of two different sources of advanced educational experiences must be identified for each category (Management, Leadership, Ethics). Such sources could be a university or college, AFP, recognized online provider, not-for-profit organization, or other appropriate professional forum. A single 45-hour course (regardless of provider) does NOT meet the requirement.

As a fundraising executive seeking an advanced professional certification, it is expected that your advanced coursework in Management, Leadership, and Ethics be focused on the not-for-profit sector and be relevant to philanthropy and fundraising.

A list of recommended courses and reading list is available at [ACFRE.org](http://ACFRE.org).

#### Course content should include one or more of the following:

- is research-based;
- is applicable to advanced fundraising professionals;
- has elements of fundraising theory, practice, and philosophy;
- is addressed on both a strategic and tactical level;
- challenges extant perspectives of the participant, the organization, or the sector;
- deals with issues from the perspective of “WHY?”, rather than “what?” or “how?”.

#### Presenter should have one or more of the following characteristics:

1. holds an advanced degree or certification;
2. is an advanced practitioner or professional in the philanthropic sector;
3. is a recognized subject-matter expert;
4. has extensive and documented experience with the subject matter;
5. engages participants rather than lectures;
6. has a documented track record of presentation excellence.

It is not sufficient for a course to be labeled "advanced." It must also be pertinent to the management of not-for-profit organizations and to leadership in the philanthropic sector. For example, a course in "Advanced Topics in Planned Giving" may be a very valuable learning experience but may not necessarily count as ACFRE Education credit.

**Advanced Management** courses address both current and future management models and focus on effectiveness, enhancement, and improvement. Topics may include: strategic planning, financial management, negotiation skills, organizational assessment and evaluation, development of a business plan, development of teams and work groups, marketing, and human resource management.

**Advanced Leadership** courses address individual as well as organizational dynamics and styles. Topics may include: personal and organizational accountability, trends in philanthropy, leadership styles, decision-making, and positioning the not-for-profit sector with government and the private sector.

**Advanced Fundraising Ethics** courses address ethical issues on a level beyond that of a basic understanding of ethical principles. Application and interpretation the *AFP Code of Ethical Standards* and ethical decision-making in a variety of advanced practice scenarios is required.



## **Portfolio Component Overview**

*Advanced Certified Fund Raising Executive (ACFRE) Program  
of the Association of Fundraising Professionals (AFP)*

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To adequately assess performance and better evaluate the candidate's skills as an advanced professional, the Advanced Certification candidate is required to submit a portfolio of fundraising materials that he or she has personally developed within the past five years -- from the date of Portfolio submission. Portfolio materials will be returned at the conclusion of the ACFRE process.

*Each portfolio is judged by the Review Board on its own merits, without regard to apparent or intentional similarity to that of any other candidate.*

*As with every stage in the ACFRE Certification process, any breach of Code of Ethical Standards will result in automatic failure of the Portfolio and referral of the breach to the AFP Ethics Committee.*

The Portfolio Review Fee (\$400 US) is due at the time of submission.

We encourage candidates to work with a mentor as they work through the credentialing process. A mentor can provide advice and a critical eye, but please note that the mentor does not participate in the review process and cannot advise the candidate specifically on the outcome of the application, portfolio, written exam, or oral review, which is solely determined by the ACFRE Certification Board. The review and the determination of pass or fail at any stage is the responsibility of the ACFRE Certification Board.

### REQUIREMENTS FOR COMPLETION

- In preparing the Portfolio, candidates are to include only those documents that are required and that answer the criteria. Including more or fewer documents will result in the portfolio being rejected.
- Candidates are to submit two (2) copies of the portfolio, each in a notebook, not to exceed 3" maximum spine width, with audio and video samples in the category of creativity on CD-ROMs, in plastic pouches, (see Checklist).
- The portfolio consists of three sections with a total of ten (10) individual pieces:
  - Section I contains one (1) Planning Document.
  - Section II contains one (1) Case Statement.
  - Section III documents Professional Competencies by containing two (2) examples of each of the four (4) elements listed in the section.

## **PORTFOLIO -- CONTENT EXPECTED**

The ACFRE is the highest certification awarded by the Association of Fundraising Professionals. As such, candidates are expected to submit the *highest quality work and most thoughtful rationale* possible in their portfolios. This is an opportunity for the candidate to present the best and most creative work he or she has completed in the past five years (from the date of portfolio submission). Length is not an evaluative criterion; rather, the cover pieces for each document should offer a compelling and complete argument as to why the piece was chosen for inclusion.

Work submitted for the portfolio must be the candidate's own, original work. Drafts created by the candidate that served as the basis for a final product prepared by others may be submitted. Candidate must submit and clearly designate original work s/he developed.

It is expected that over 10 years, the advanced fundraising professional will have developed a number and variety of documents to best achieve their fundraising, management, and organizational goals. In the event, however, that the candidate does not have an appropriate document for one or more of the required pieces, a prototype may be created and presented in the portfolio, and designated as such.

Each portfolio piece will be evaluated for appropriate ethical considerations. *As with every stage in the ACFRE Certification process, any breach of Ethical Standards and Practice will result in automatic failure of the Portfolio and referral of the breach to the AFP Ethics Committee.*

### **GENERAL PORTFOLIO PRESENTATION**

In addition to the "content" evaluation described below, each portfolio piece will be evaluated for grammar, spelling, communication of message, appropriateness to audience, and achievement of purpose.

As well, the entire portfolio will be evaluated for neatness, organization of material, clarity of presentation, and clarity of thought. The portfolio should be something the candidate is proud to submit and should reflect the candidate's advanced attention to detail, structure, and appearance.

### **SECTION I. PLANNING DOCUMENT**

The candidate is required to submit a planning document relevant to his or her current position or that is as current as possible (within the past five years from date of portfolio submission). Examples of planning documents include (but are not limited to) Campaign Plan, Strategic Plan, Annual Plan, Marketing Plan. Consultants are to present a planning document used with one of their clients in the past five years from date of portfolio submission. A completed Portfolio Inclusion Rationale cover sheet is required.

The planning document should illustrate:

- the role of the board, development committee, other appropriate volunteers in the planning process;
- the role of development staff and institutional leadership in the process;
- the integration of development goals with institutional goals and mission;
- evidence of internal capacities, current market conditions, external environment, and research on the needs of the community served by the institution;
- goals, strategies, and objectives that lead to action by staff and volunteer leadership;
- action steps and the implementation process;
- measurable and timed benchmarks;
- how the plan will be evaluated for completion and effectiveness;
- details on the implementation process (who does what, when);
- timeline for completion of the plan;
- the outcomes desired as a result of successful completion of the plan;
- volunteer or professional oversight to ensure the plan was operational and effective.

## **SECTION II. CASE STATEMENT**

The candidate is required to submit a case statement relevant to his or her current position for his/her organization or that is as current as possible (within the past five years from date of portfolio submission). Consultants are to present a case statement prepared for one of their clients within the past five years from date of portfolio submission.

The case statement should be rich in images of the organization, cause, campaign, or other purpose. It may be lengthy or abbreviated, but should reflect the organization, its needs, and its opportunities. A Portfolio Inclusion Rationale cover sheet is required.

The case statement should make the case by:

- stating the vision and mission of the organization;
- providing a brief history of the organization;
- stating the need;
- explaining the project;
- defending the need in terms of the community / constituents;
- identifying who is providing leadership;
- presenting the budget / goals;
- defining the time period; and
- presenting the opportunities;
- articulating how the reader can get involved.



### **SECTION III. PROFESSIONAL COMPETENCIES**

The candidate must submit two (2) pieces for each professional competency. Each piece should illustrate your most advanced work developed within the past five years from date of Portfolio submission. A Portfolio Inclusion Rationale cover sheet is required for each of the eight (8) pieces.

- A. Writing—Pieces should demonstrate clarity of thought, effective communication, organization, and appropriateness for the intended audience. Examples include (but are not limited to) a grant proposal, published article, direct mail piece, press release, or acknowledgment letter.
- B. Creativity—Pieces should demonstrate innovation, uniqueness, and appropriateness. Examples include (but are not limited to) an annual report, newsletter, donor recognition piece, special event invitation, deferred giving seminar program, or an operations or policy innovation.
- C. Management—Pieces should demonstrate the candidate’s ability to implement organizational plans and strategies to accomplish institutional goals and objectives, an understanding of roles and responsibilities across the division or organization, and budgetary implications and / or fiscal impacts. Examples include (but are not limited to) budgets, definition of roles (staff, CEO, volunteers), staff retreats, business plan, strategic plan, or procedures that have been developed by the candidate.
- D. Teaching/Training—Pieces should demonstrate knowledge of the subject, organization of material, suitability of learning exercises, and appropriateness to the audience. Examples include (but are not limited to) volunteer training materials, orientation packets, training manual, course outlines, and handouts.

**Advanced Certified Fund Raising Executive (ACFRE) Program  
Portfolio Process (Continued)**

**PORTFOLIO INCLUSION RATIONALE**  
(You may recreate this on your own computer.)

*Answer each question as fully as possible. There is no limit on space or amount of information you may provide. A professionally-developed Portfolio is expected to be well-organized, neat, without grammatical or spelling errors, and clear in thought and presentation, as in the Portfolio Inclusion Rationale.*

*This is your opportunity to highlight your body of professional work. It is to the candidate's advantage to submit the highest quality work possible and the most thoughtful, complete, and compelling description / rationale.*

1. Portfolio Element represented by this piece (check only one):

- |  |   |
|--|---|
| <input type="checkbox"/> Planning Document                   | <input type="checkbox"/> Case Statement                             |
| <input type="checkbox"/> Professional Competency: Writing    | <input type="checkbox"/> Professional Competency: Creativity        |
| <input type="checkbox"/> Professional Competency: Management | <input type="checkbox"/> Professional Competency: Teaching/Training |

2. Document Title

3. Date of Document Creation / Publication

4. For whom was this piece intended?

5. How was this piece distributed?

6. Is this document a prototype created by the candidate for Portfolio submission?

7. What was the purpose of this piece?

8. What were the expected and actual outcomes from this piece?

9. What are the ethical implications involved with this piece?

10. Why did you select this piece to include in your portfolio?

\_\_\_\_\_  
Signature of ACFRE Candidate

\_\_\_\_\_  
Date

*Advanced Certified Fund Raising Executive (ACFRE) Program*

**PORTFOLIO CHECKLIST**

**Please use this page as the cover page for your portfolio.**

- Portfolio Notebook is no more than three (3) inches thick, including ALL materials.
- Ten (10) pieces are included, with an identification page for each piece.  
(Including more or fewer pieces will result in the Portfolio being rejected.)
- Tabs precede each section and each document presented.
- Pages are numbered within each tab.
- If submitting audio or video samples for any Section, each is appropriately labeled and included in a plastic pocket behind the appropriate cover sheet.
- Work submitted is the candidate's own, original work, either in final form, draft form, or prototype form.

COVER SHEET

- Portfolio Checklist, Signed

SECTION I: PLANNING

- Portfolio Inclusion Rationale, Planning Document
- Planning Document

SECTION II: CASE STATEMENT

- Portfolio Inclusion Rationale, Case Statement
- Case Statement

SECTION III: PROFESSIONAL COMPETENCIES

***Nota Bene: At least one of the documents in each of the four categories in this section MUST BE the candidate's own work, not developed in collaboration with others.***

Two Examples of Writing Competency

- Portfolio Inclusion Rationale, Document 1 -- Writing
- First Document -- Writing
- Portfolio Inclusion Rationale, Document 2 -- Writing
- Second Document -- Writing

Two Examples of Creativity

- Portfolio Inclusion Rationale, Document 1 -- Creativity
- First Document -- Creativity
- Portfolio Inclusion Rationale, Document 2 -- Creativity
- Second Document -- Creativity

Two Examples of Management Competency

- Portfolio Inclusion Rationale, Document 1 -- Management
- First Document -- Management
- Portfolio Inclusion Rationale, Document 2 -- Management
- Second Document -- Management

Two Examples of Teaching/Training Competency

- Portfolio Inclusion Rationale, Document 1 -- Teaching/Training
- First Document -- Teaching/Training
- Portfolio Inclusion Rationale, Document 2 -- Teaching/Training
- Second Document -- Teaching/Training

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Signature of ACFRE Candidate

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Date

# Test Specifications for the ACFRE Written Examination

*Advanced Certified Fund Raising Executive (ACFRE) Program of the  
Association of Fundraising Professionals (AFP)*

The ACFRE Written Examination is a three-hour constructed response exam designed to measure a candidate's knowledge of the following topics identified through the AFP Practice Analysis.

| <i>DOMAINS (ROLES &amp; SUB-ROLES)</i>          |  |
|---|--|
| <b>01 Fundraising- Prospect Identification:</b> | The process of collecting data in an organized manner on individuals, corporations, foundations, organizations, and government agencies that might become donors to an organization. |
| <b>02 Fundraising- Cultivation/Education:</b>   | Relationship building to advance the vision and mission of the organization in concert with the donor's philanthropic passions, interests, and priorities.                           |
| <b>03 Fundraising- Solicitation:</b>            | Actions and processes that lead to and include inviting donors, stakeholders, and prospects to invest resources in the mission and vision of charitable organizations.               |
| <b>04 Fundraising- Recognition:</b>             | Policies and practices designed to maximize the benefits of giving for all donors and volunteers over the long term  |
| <b>05 Fundraising- Gift Management:</b>         | Policies, procedures, and practices for gift acceptance, acknowledgment, use, and reporting of funds.  |
| <b>06 Management:</b>                           | Plan, implement and evaluate the processes that lead the organization to perform with ethics and accountability, and to ensure public confidence and trust.                          |
| <b>07 Advancing Philanthropy:</b>               | Advocate for the essential role of philanthropy in a civil society.  |
| <b>08 Advancement of the Profession:</b>        | Embrace a leadership role through words and deeds in promoting the ethics and benefits to society and the fundraising profession.  |

Criteria for evaluating the exam will include demonstration of knowledge of the above listed focus areas, as well as demonstration of advanced knowledge and understanding of fundraising ethics, management, leadership, planning, and problem solving. Proper spelling and grammar will be considered in the evaluation process.

Exam takers are provided with a computer with Word software, and, without outside resources, are asked to answer their choice of five (5) of seven (7) questions.



## Oral Peer Review

### *Advanced Certified Fund Raising Executive (ACFRE) Program of the Association of Fundraising Professionals (AFP)*

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#### TOPICS

Choose two topics from the list below on which you wish to be reviewed. The ACFRE Certification Board will include questions in the areas you choose as part of your Oral Peer Review.

- Annual Campaigns
- Board Development/Governance
- Capital Campaign
- Corporations and Foundation
- Endowments
- Major Gifts
- Nonprofit Management
- Organizational Development
- Planned Giving
- Public Relations
- Special Events

#### PROCEDURE

ACFRE candidates must successfully complete an Oral Peer Review and Evaluation by responding to four general questions, four questions on the candidate's selected topics (two questions for each of two topics), and one capstone question. Candidates have one half hour to themselves to review the four (4) general questions, which will be asked first. The Review Panel will then enter and introduce its members. The candidate has fifteen (15) minutes to respond to each question. There is a short break, after which the Review continues with two questions on each of the candidate's two selected topics. The candidate has fifteen (15) minutes to respond to each question. There will be another short break. Following the second break, the candidate will be asked one capstone question for which fifteen (15) minutes is allowed. The entire review lasts about three hours. Candidates are notified in writing within seven (7) days regarding the results of their Oral Peer Review.

#### SAMPLE QUESTION (ANNUAL CAMPAIGNS)

Assume you have taken a new position as Vice President of Development. The Development Committee has traditionally functioned only as a special events committee. Now you want the committee to take a more active role in implementing the annual campaign plan, including making solicitation calls. What steps would you take to make the transition? What ethical considerations are there in this issue?

*Advanced Certified Fund Raising Executive (ACFRE) Program  
Oral Peer Review and Evaluation Process (Continued)*

**SCORING FOR THE ACFRE ORAL PEER REVIEW**

During the Review, candidates are expected to clearly and in an organized manner articulate an advanced knowledge of fundraising and demonstrate how their selected topics relate to the entire field from a global perspective. Candidates are expected to communicate advanced knowledge (both global and specific) and skills that are both experientially and theoretically based.

The Review Panel evaluates both content and process. Each of the questions will focus on issues, problems, and scenarios typical to fundraising at the advanced level. Each response will be scored on the basis of how well it reflects each of the following dimensions of practice:

- Candidate has demonstrated understanding of fundraising ethics, based on the AFP Code of Ethical Standards. ***Failure to pass this dimension of the examination on any of the 9 questions will result in an automatic Fail for the Oral Peer Review.***
- Candidate has demonstrated problem-solving skills.
- Candidate has demonstrated evidence of management skills.
- Candidate has demonstrated an understanding of planning, implementation, and evaluation as components of the total development process.
- Candidate has demonstrated advanced level of knowledge and skill in [Selected Topic 1].
- Candidate has demonstrated advanced level of knowledge and skill in [Selected Topic 2].
- Candidate has demonstrated clarity and organization of thought, ability to think and articulate well extemporaneously, and professional presentation of ideas.



## **Order of the Process**

### *Advanced Certified Fund Raising Executive (ACFRE) Program of the Association of Fundraising Professionals (AFP)*

1. The ACFRE process is comprised of four sequential components (Application, Portfolio Review, Written Exam, Oral Peer Review), each of which must be successfully completed before moving to the next.
2. The ACFRE Candidate has two years to complete the process.
3. Each Candidate's ACFRE Process "calendar" begins upon formal acceptance of the Application.
4. Portfolio submission must be within one year of approval of Application. Written exam must be taken within one year of approval of portfolio.
5. Cost for each component is \$400.
6. Should a component need to be re-done, Candidate will pay an additional \$400 for the second attempt.
7. Portfolio Review, Written Exam and Oral Peer Review may each be taken up to three times.
8. If a candidate fails a phase of the ACFRE process (after 3 attempts) s/he must wait one year before submitting a new ACFRE application.
9. Candidate may request one one-year extension to his/her "calendar" at any time during the process.

## The ACFRE Process

