

# **Planning Your Way to a Successful AFP CFRE Refresher Course**

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# A Planning Kit for Hosting the AFP CFRE Refresher Course (formerly the AFP CFRE Review Course)



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## **AFP CFRE Refresher Course**

After more than two years of work, in 2017 AFP completed revision of the AFP CFRE Review Course, now titled the AFP CFRE Refresher Course. This workshop uses “caselets”—short case studies—to review the six fundraising knowledge domains and the core principles and concepts that all experienced fundraising professionals should know.

*The AFP CFRE Refresher Course is not designed to be a preparatory course for the Certified Fund Raising Executive (CFRE) Examination but instead is a review of the body of knowledge at the five-year level which many individuals use in studying for the exam. There is no guarantee that any of the specific content covered in this course will appear as specific items on the CFRE examination. CFRE International does not sponsor or endorse any educational programs, and this course was not developed in conjunction with CFRE International. (NOTE: CFRE International made some minor program updates, effective January 1, 2016. These changes have little or no impact on what individuals encounter when taking the CFRE Exam. Still, those changes are incorporated in the new AFP CFRE Refresher Course. For more information about those January 1, 2016, changes, people should contact CFRE International directly at [2016 CFRE Programme Updates](#).)*

AFP strongly suggests that participation in the AFP CFRE Refresher Course be just one element of one’s study plan to prepare for the CFRE Exam. Please visit the CFRE International website [www.cfre.org](http://www.cfre.org) for additional study materials. A complete overview of the development function for fundraising professionals who would like to improve their development skills, learn to raise money more efficiently or build upon their current development skills.

### **Course Format:**

The AFP CFRE Refresher Course is organized differently – by the six knowledge domains of the CFRE exam (rather than the previous nine Modules). The course is not presented in a lecture format—in whole or in part; rather, it is a combination of a high-level review, self-exploration of knowledge and peer exchange of best practices – all of which are facilitated by an experienced, knowledgeable fundraising practitioner using a caselet approach. As a result, the agenda is different from the previous version.

Further, the course is designed so that can be taught within different time periods:

- An intense 8 hours – primarily for those having previous experience with the CFRE Exam
- An expanded 16 hours – with more time for active, interactive discussion, primarily for those with no previous experience with the CFRE Exam
- An expanded multi-day – with each domain addressed on a separate day over a period of time (e.g., every Wednesday afternoon for six weeks), again allowing more time for active, interactive discussion

The chapter has the option to determine classroom time; but it must follow the format of the manual.

Domains include:

## **1. Current and Prospective Donor Research**

### **2. Securing the Gift**

### **3. Relationship Building**

### **4. Volunteer Involvement**

### **5. Leadership and Management**

### **6. Ethics, Accountability and Professionalism**

Materials for faculty are provided to the Chapter Site Coordinator, who then distributes to faculty members. Printed participant manuals are provided. ordered by the chapter for distribution to each registrant.

## **Summary: Key Steps in the Process**

1. Select venue and date(s) for class; set prices
2. Appoint the Site Coordinator (who takes over the class planning, preparations, conduct and follow up, and who also serves as primary point of contact with AFP IHQ)
3. Complete, sign and submit the Host Agreement Form (included in this toolkit) to AFP IHQ – at a minimum of 3 months before class starts, ideally 6-12 months before
4. Send deposit to AFP IHQ
5. Establish online registration site
6. Begin active promotion
7. Recruit qualified faculty, obtain completed/sign agreement form and application form from each and sending to AFP IHQ
8. Ensure faculty receive needed faculty materials
9. Confirm projected final number of participants with AFP IHQ – 3-4 weeks prior to class start date
10. Prepare Certificates for all participants
11. Conduct class
12. E-mail final registration list to AFP IHQ (to include whether each is AFP Member)—within 3 days after class.
13. Scan and e-mail Sign-In Sheets
14. Facilitate Payment of Final Invoice

## **Who?**

The AFP CFRE Refresher Course is designed for fundraising professionals with 5 or more years of experience. This may include executive directors, vice presidents of development, program managers and special event coordinators for local nonprofits and foundations. Also, staff members of university development offices may be good candidates for the course. Individuals are not required to take the CFRE Certification Exam after the course; they may also benefit from the information presented. Course attendance averages between 10 and 20 participants.

## **When?**

The AFP CFRE Refresher Course is designed so that it can be taught within different time periods:

- An intense 8 hours
- An expanded 16 hours – with more time for active, interactive discussion.
- An expanded multi-day – with each domain addressed on a separate day over a period of time (e.g., every Wednesday afternoon for six weeks), again allowing more time for active, interactive discussion

The chapter has the option to determine classroom time; but it must follow the format of the manual. A typical 8-hour schedule is 8:00 a.m. – 5:00 p.m. See pages 12 and 13 for one-day and two-day Agenda templates.

## How much?

The established **base price charged to participants is \$390 AFP Member; \$490 Non-Member**. The chapter may choose to charge more to underwrite additional expenses, or may charge less, when choosing the intense 8-hour class, when a grant or donation has been provided to help underwrite costs the chapter incurs. However, the amount that the Chapter pays to AFP IHQ remains the same. The fee structure for payments to AFP IHQ is as follows:

<b><i>AFP CFRE Refresher Course</i></b>	<b>Option A: Joint Venture</b>	<b>Option B: AFP Member Franchise Fee</b>	<b>Option C: Non-AFP Member Third Party Franchise Fee</b>
Full Course (all 6 Domains)	<b>\$195 AFP Member; \$245 Non-Member (1/2 of the base price per participant)</b>	<b>\$2,900.00 + \$50.00 per participant</b>	<b>\$5,000.00 + \$50.00 per participant</b>
Per Module	<b>\$90 AFP Member; \$120 Non-member</b>	N/A	N/A

AFP Chapters have the option of delivering the course using Option A: Joint Venture or Option B: AFP Member Franchise Fee.

**NOTE: Materials being shipped to Mexico or Canada will incur separate shipping fees, charged to the host chapter, regardless of the Option chosen.**

### **Option A: Joint Venture**

The base registration fee for participants is **\$390** for members and **\$490** for nonmembers. From this, the AFP International Headquarters receives **\$195** per member and **\$245** per non-member. The registration fee normally covers one Continental Breakfast, one Lunch and two breaks. The chapter may choose to charge a fee higher or lower than the base fee to subsidize the registration fee for some participants (charging less than **\$390**) or to cover extra meals or other costs. In this case, AFP IHQ still receives **\$195/ member and \$245/nonmember.**

### **Option B: AFP Member Franchise Fee**

The AFP Chapter would pay a fee of **\$2,900** to AFP International plus **\$50** per participant. AFP International recommends that the Chapter charges the base registration fee for participants, **\$390** for AFP members and **\$490** for non-members. The registration fee normally covers breaks and one lunch. The chapter may choose to charge a fee higher or lower than the base fee to subsidize the registration fee for some participants (charging less than **\$390**) or to cover extra meals or other costs.

Please note that the AFP Member Franchise Fee and the Non-AFP Member Third Party Franchise Fee cover a **one-time use**, taught in a one-day or two-day time period or over an extended period of time.

Additionally, there will be a \$1,000.00 deposit made to AFP by a host chapter (or other organization) upon signing the course Agreement. The deposit should be received at AFP IHQ shortly after the AFP Chapter submits the signed Host Agreement Form; but it must be received at AFP IHQ no later than 90 days before the start date of the class. This \$1,000.00 will be applied to the total cost of your class and is required up front in order for AFP to ensure you receive all participant/faculty materials/products on time, as well as to cover AFP's incurred costs in supporting the class. As it states in the first page of the signed Host Agreement Form, "Once paid, the deposit is not returned in the event of a cancellation but rather applied to a future course." So, should the host decide to cancel or reschedule for any reason, the deposit is not refunded, though – at AFP IHQ discretion – it may be applied as deposit to a future or rescheduled class.

Unless other arrangements are made, the chapter collects and tracks all registration fees. All invoices from AFP International Headquarters are in U.S. Dollars. All payments to AFP

International Headquarters must be in U.S. Dollars.

Canadian sites have the option of collecting registration fees in Canadian dollars. They are still invoiced by IHQ for fees in U.S. dollars. However, given current currency exchange rates at this time, they may choose to pay in Canadian Dollars at par. This may be done either by credit card payment or by cheque.

## **Where?**

The chapter is responsible for securing a location to hold the course. Some chapters choose to use hotel meeting rooms; others have a training room or conference room space that can be utilized without cost.

The chapter must select and submit the location for the AFP CFRE Refresher Course before the date will be listed on the AFP education schedule. When selecting the location, a chapter should consider the following:

- The site should be accessible by any with a disability (i.e., ramps for wheelchairs; accessible restrooms, etc.)
- The site should be in a central location, with easy access to area highways, etc., and in close proximity to area hotels for out-of-town participants.
- Room set-up for the course should be set in rounds. A registration table should be set up outside the door to the room, or just inside the room, for easy participant registration. The usual size class of around 10-20, the room need not be larger than it has been in the past. The facilitator manual recommends 4-5 people per round table, and one flipchart per table. So, if the class size is 20, there would be 4-5 tables and 4-5 flipcharts.
- Audio visual requirements for the course include a computer, LCD projector, screen, flip chart, podium if desired and possibly a microphone, depending on the size of the room. There should be a table at the front of the room for faculty members to place their materials.

## **CFRE Points – CFRE Credit & Tracking?**

**Every time an AFP Chapter offers any AFP International courses, it is the Chapter's responsibility to submit to CFRE International to get it approved.** Though the Association of Fundraising Professionals overall is a member, individual AFP Chapters need to complete the Approved Provider Application.

This includes your Chapter. You can do this at the CFRE International Website.

Breadcrumbs: [www.cfre.org](http://www.cfre.org) → Bar across top → **Education** → **Becoming An Approved Provider** → Note that near the bottom of the page it states that “The (Provider) fee is waived for our Participation Organisations and their chapters.” This includes the Association of Fundraising Professionals → **Approved Provider Application**

Complete and submit the Approved Provider Application. Under “Fees,” click on the button in front of the statement that reads “No Fee – Participating Organisation”

This should resolve it; but if you encounter any problems or have further questions not answered on their Web pages, follow through with the **CONTACT US** at the top line, far right of the page, and then to **Continuing Education** (1 571 699 0602).

A related subject, that frequently comes up involves the individual fundraising professional who is tracking CFRE Credits year ‘round, who is asking whether there is easy way to track the credits they take each year to maintain CFRE status.

Each course a person took would have an individual CE tracker or certificate (like the AFP classroom courses - e.g., AFP CFRE Refresher Course) if it is eligible for credit. Individuals can then keep track of her own credits by adding them to their online application at [www.cfre.org](http://www.cfre.org). So, essentially, such tracking is done with CFRE International,

Regarding how CFRE Points are measured, per CFRE International and the CFRE Application: 1 point for each hour spent **attending** educational conference sessions or workshops. 2 points for each hour spent **teaching** educational conference sessions or workshops using **previously developed material**. 3 points for each hour spent teaching educational conference sessions or workshops using newly developed material. The teaching can't be part of the applicant's regular job duties, however.

Specific to the AFP Core Classroom Courses, which chapters host:

- AFP Fundamentals of Fundraising Course is 16.0 education credits,
- AFP CFRE Refresher Course is 8 points if taught in 8 hours or 16 points of continuing education CFRE credit if taught over 16 hours with more time for facilitated discussion.
- AFP Donor Retention Workshop is worth 8 points of CFRE education credit.

So, Chapter tracking of CFRE points is done directly with CFRE International and not through AFP. Also, each faculty member should track their own credits by adding them to their online application at [www.cfre.org](http://www.cfre.org). However, AFP IHQ does record the names of the faculty as well as the number of hours teaching by way of the Class Agenda, which the Site Coordinator provides to AFP, and which AFP retains for the record, should it be requested by CFRE International. Again, see the Agenda templates below.

## How?

### **Chapter Responsibilities:**

- Select a date six (6) or more months in advance
- Complete the agreement contract and submit to AFP IHQ along with the deposit as soon as a date and venue have been chosen; but the **deposit must be received at AFP**

**IHQ no later than 90 days prior to the planned start date**, and before Faculty materials are provided.

- ◆ Select one person to coordinate with AFP IHQ—The Site Coordinator.
- ◆ Select a location to hold the course.
- ◆ On the Agreement Form, PLEASE make sure you provide a street address and not a PO Box for the shipment of materials. Shipments to you will come either UPS or FedEx; and neither can deliver to a PO Box.
- ◆ Recruit faculty and provide list to AFP IHQ along with credentials for each facilitator.
- ◆ Provide each faculty member with FACULTY AGREEMENT FORM, obtaining it back – completed with signature – and forward to AFP IHQ.
- ◆ Provide each faculty member with TRAINER APPLICATION FORM, obtaining it back – completed with signature – and forward to AFP IHQ.
- ◆ Obtain faculty materials through AFP IHQ (from Omnipress) to go to The Site Coordinator at least 4-6 weeks prior to course. The Site Coordinator is then responsible for dispersing the materials to the individual facilitators
- ◆ Collect registration fees.
- ◆ Arrange for snack breaks and meals.
- ◆ Order participant manuals from AFP IHQ (to be sent by Omnipress) 3 or more weeks prior to course
- ◆ Provide participant list to AFP IHQ 4 or more weeks before your course so your final packet can be sent. Final packet includes: Participant Manuals, electronic copies of completion certificates, sign-in sheet for each day, and name badge template
- ◆ Provide an on-site monitor (The Site Coordinator) to
  - ensure that participants sign in,
  - welcome and introduce faculty members,
  - distribute the participant survey at the start of the class – then, collect all at end of the class before participants depart,
  - and sign and distribute certificates of completion to participants at the end of the course.
- ◆ Provide AFP IHQ with
  - a financial summary (including number of AFP members and non-members in attendance),
  - a final participant roster with documentation of

- who is an AFP Member and who is non-member, scanned copy of each sign-in sheet, and
- a copy of the course agenda with faculty names, upon completion of the program.
  - Retain unused participant manuals at the close of the course for use in a future class.
  - If the host has unused participant manuals after the conclusion of the class, the host may choose either to retain the manuals for a future class or return them to AFP IHQ. If retained, the host is charged \$50 for each manual, which will be a credit for the that future class. If returned, the host is responsible for the costs of the return shipping of the manuals.

#### **AFP International Headquarters Responsibilities:**

- Post the class information on the AFP website
- Contact the Chapter Site Coordinator for the faculty list (immediately after receiving the signed Host Agreement Form; follow-up if necessary) and participant list (3 or more weeks prior to the course) in order to facilitate provision of faculty materials and participant manuals
- Provide the Site Coordinator with the final packet, once IHQ receives the nearly final participant list (4 weeks prior to the course)
- Invoice course host(s) at class completion. Balance of payment is due once course is completed and chapter provides final registration list (with AFP membership status) and sign-in sheets.

#### **Planning Time Line and Checklist**

To help ensure success, especially in recruiting the preferred faculty and registering the desired larger numbers of participants, you should start the process early.

**AFP recommends that AT LEAST six (6) months and ideally 9 to 12 months in advance of the scheduled class start date, you:**

**Site Coordinator –** Have your Site Coordinator recruited, oriented to the task at hand, and underway.

**Dates and Venue** – Have confirmed the class dates and the site where the training will be conducted.

**Signed Host Agreement and Deposit** – Complete sign, scan and e-mail to AFP IHQ the Host Agreement Form (see pages 26-27). At about the same time, send the deposit – but no later than 90 days before the class start date. Why so much time? You need to reach people while they still have the class dates open on their calendars. People make many commitments months in advance.

**Online Registration** – Make sure you complete set up of the online registration by the time you send the signed Host Agreement Form, or as soon as possible thereafter. With the online link for registration and the information contained in the Host Agreement, AFP IHQ can post the key information on [www.afpnet.org](http://www.afpnet.org). This posting reaches potential participants from around the world, particularly in North America, and gives them the information they need to proceed.

**Promotion** – Begin aggressive promotion through as many channels as possible. Do not limit to your Chapter members, take it to every organization and every fundraiser within your state and nearby states.

**Faculty** – Begin recruitment of the best qualified faculty (AFP Master Trainers as possible). The sooner you reach out, the better chance you will have that your targeted faculty will have the class dates available on their calendars. You should have all your faculty locked in and preparing as soon as possible, but no later than two months before the class start date.

	<b># of Months Prior</b>	<b>Assigned to</b>	<b>Target Task Date</b>	<b>Date Completed</b>
1. Choose preferred course dates and check calendar for conflicts				
2. Appoint individual to be primary contact with the AFP IHQ and on-site coordinator				
3. Submit deposit and signed agreement to AFP IHQ (Must be received at AFP IHQ no later than 90 days prior to planned start date) and ideally 6-12 months in advance.				
4. Select location, execute commitment				
5. Develop a budget				
6. Plan promotion campaign/target audience				
7. Place newsletter article: advise surrounding chapters to do the same; date will be listed in on the website.				
8. Prepare brochures for promoting course				

- |   |  |  |
|---|--|--|
| 9. Obtain mailing lists from sponsoring chapter(s)  |  |  |
| 10. Recruit faculty (complete at least 4-6 weeks prior to start date to allow time to prepare), collect faculty bios with relevant credentials for introductions and to provide to AFP IHQ. <b>Ask each faculty member to sign and return to Site Coordinator both the FACULTY AGREEMENT FORM and the TRAINER APPLICATION FORM for the <i>AFP CFRE Refresher Course</i>. Both are required.</b> Once collected, The Site Coordinator sends to IHQ. Order faculty materials from AFP IHQ. Also, send copy of class Agenda with faculty names incorporated. |  |  |
| 11. Mail/email brochure   |  |  |
| 12. Send follow-up postcard or letter to the initial list of prospects  |  |  |
| 13. Confirm catering  |  |  |
| 14. Order participant manuals from AFP IHQ (should be done 3-4 weeks prior to course)   |  |  |
| 15. Develop agenda, faculty roster and participant roster and make copies for participants  |  |  |
| 16. Prepare name badges/tents for participants  |  |  |
| 17. Assemble materials needed onsite (receipt book, pens, sign-in sheet, PowerPoint slides, agendas, rosters, certificates of completion, name badges or name tents)  |  |  |
| 18. Provide financial summary and return extra manuals and other materials to AFP IHQ after the course  |  |  |

**Copy of Slides as a Handout:**

Participants may ask you for a copy of the course slides; they often believe the slides are needed to have a full record of what they're learning. That may be true in some situations. However, this course has been

designed and developed following adult learning principles and practices as well as what research has shown about how our brains learn. That means, in part, that the slides are for the most part only “visual placeholders;” the *Participant Manual* has everything the slides contain, and much more. **There is no need to provide the slides to participants and, in fact, we ask specifically that you do not.**

**Faculty and Participant Manuals should be ordered through  
Professional Development at AFP IHQ.**

Manual orders come from Omnipress in Madison, WI. These orders normally are shipped via UPS Ground within the USA, unless otherwise requested (and paid for). Cannot ship ground to Canada.

**Manuals shipped to countries other than the United States will incur separate shipping charges.** Please note that to prevent interruptions in Canadian shipments, all packages will be using Omnipress' UPS Non-resident Importer (NRI) program. Only UPS “Worldwide” shipping methods are available. Canadian brokerage fees, are included in all UPS “Worldwide” shipping methods. Fees from duties and taxes will be included.

NOTE: The participant manual contains information about the CFRE competencies for each domain, a self-assessment of key knowledge areas for the domain, and an overview of key knowledge areas for the domain (similar to the previous CFRE Review Course participant manual). The facilitator guide is very different. It focuses on logistics for the course. It does not include the detailed content information found in the participant manual.

**SAMPLE BUDGET  
AFP CFRE Refresher Course**

**Income:**

Registration income @ \$390 x 20 participants	\$	<u>7,800.00</u>
<b>TOTAL INCOME COULD BE</b>	\$	<b>7800.00</b>

**Expenses:**

Marketing materials & postage		\$ 350.00
Printing 500 brochures		300.00
Postage (500 @ \$0.41)		
Mailing		
120.00		
AFP CFRE Refresher Course fee @ \$195 x 20 participants		<b>3,900.00</b>
Copying handouts		35.00
Meeting room fees @ \$350 x 2 days		700.00
Breakfast, Lunch and breaks @ \$30 per person x 20 persons		<b><u>600.00</u></b>
<b>TOTAL EXPENSES</b>	\$	6,005.00
<b>Net Income</b>	\$	1,795.00

**NOTE:** Budgets will vary according to pricing, attendee (member/non-member), printing, meeting space and food costs in your area. If you must do your copying on the outside (e.g., Staples, Office Depot, or FedEx Office), copying can be much higher. This budget assumes you have flip charts and markers; but if you do not have and can't borrow and so, need to purchase them, add those costs. Again, this is a sample budget. Remember that the price of \$390/participant is the base. You may set it higher.

**NOTE:** Materials being shipped to Mexico or Canada will incur separate international shipping fees, charged to the host chapter.

## **CFRE Points**

Full participation in the intensive one-day, **8-hour AFP CFRE Refresher Course** is applicable for **8 points** of CFRE Credit in Category 1.B – Education of the CFRE International application for initial certification and/or recertification. These points apply when conducted according the following one-day template with 8 contact hours.

Full participation in the more interactive two-day, **16-hour AFP CFRE Refresher Course** is applicable for **16 points** of CFRE Credit in Category 1.B – Education of the CFRE International application for initial certification and/or recertification. These points apply when conducted according to the following two-day template with 16 contact hours.

### **Template One-Day Session Agenda AFP CFRE Refresher Course**

#### Overall course objectives—

Following active engagement during this course, participants will be able to:

- Identify personal strengths and weaknesses in domain content.
- Assess personal level of readiness to take the CFRE examination.
- Develop an effective personal study plan.
- Apply fundraising skills and knowledge to real-life fundraising scenarios.

		<b>FACILITATORS</b>
7:30 - 8:00 a.m.	<b>Sign In</b> - Continental Breakfast	
8:00 - 8:45 a.m.	Chapter 1: <b>Welcome and Introduction to the Course</b>	
8:45 - 9:15 a.m.	Chapter 2: <b>Domain 1 – Current and Prospective Donor Research</b>	
9:15 -10:00 a.m.	Chapter 3: <b>Domain 2 – Securing the Gift</b> <i>Application: Domains 1 and 2</i> • Small-group work on caselets	
10:00 -10:15 a.m.	<b>Break</b>	
10:15 -10:45 a.m.	<b>Application: Domains 1 and 2.</b> <i>Full-group discussion/Feedback/Q&amp;A regarding caselet outcomes</i>	
10:45 -11:15 a.m.	Chapter 4: <b>Domain 3 – Relationship Building</b>	
11:15 a.m.-12:00 p.m.	Chapter 5: <b>Domain 4 – Volunteer Involvement</b> <b>Application: Domains 3 and 4</b> <i>Small-group work on caselets</i>	
12:00 - 1:00 p.m.	<b>Lunch</b> (in room)	
1:00 - 1:45 p.m.	<b>Application: Domains 3 and 4</b> <i>Full-group discussion/Feedback/Q&amp;A regarding caselet outcomes</i>	
1:45 - 2:15 p.m.	Chapter 6: <b>Domain 5 – Leadership and Management</b>	
2:15 - 3:00 p.m.	Chapter 7: <b>Domain 6 – Ethics and Accountability</b> <b>Application: Domains 5 and 6</b> <i>Small-group work on caselets</i>	
3:00 - 3:15 p.m.	<b>Break</b>	
3:15 - 3:45 p.m.	<b>Application: Domains 5 and 6</b> <i>Full-group discussion/Feedback/Q&amp;A regarding caselet outcomes</i>	
3:45 - 5:30 p.m.	<b>Reflection, General Questions, and Wrap-up Discussion</b>	

**Template  
Two-Day Session Agenda  
AFP CFRE Refresher Course**

Overall course objectives—

Following active engagement during this course, participants will be able to:

- Identify personal strengths and weaknesses in domain content.
- Assess personal level of readiness to take the CFRE examination.
- Develop an effective personal study plan.
- Apply fundraising skills and knowledge to real-life fundraising scenarios.

<b>Day 1</b>		<b>FACILITATORS</b>
7:30 - 8:00 am	<b>Sign In</b> - Continental Breakfast	

8:00 - 8:45 am	Chapter 1: <b>Welcome and Introduction to the Course</b>	
8:45 - 10:00 am	Chapter 2: <b>Domain 1 – Current and Prospective Donor Research</b>	
10:00 -10:15 am	<b>Break</b>	
10:15 -12:00 pm	Chapter 3: <b>Domain 2 – Securing the Gift</b>	
12:00 - 1:00 pm	<b>Lunch</b> (in room)	
1:00 - 2:00 pm	<b>Application: Domains 1 and 2</b> • Small-group work on caselets	
2:00 – 3:00 pm	<b>Application: Domains 1 and 2.</b> <i>Full-group discussion/Feedback/Q&amp;A regarding caselet outcomes</i>	
3:00 - 3:15 pm	<b>Break</b>	
3:15 - 5:00 pm.	Chapter 4: <b>Domain 3 – Relationship Building</b>	
5:00 – 5:30 pm	Chapter 5: <b>Domain 4 – Volunteer Involvement</b>	
<b>Day 2</b>		
7:30 - 8:00 am	<b>Sign In</b> - Continental Breakfast	
8:00 - 9:15 am	Chapter 5: <b>Domain 4 – Volunteer Involvement (continued)</b>	
9:15 -10:15 am	<b>Application: Domains 3 and 4</b> <i>Small-group work on caselets</i>	
10:15 - 10:30 am	<b>Break</b>	
10:30 - 11:15 am	<b>Application: Domains 3 and 4</b> <i>Full-group discussion/Feedback/Q&amp;A regarding caselet outcomes</i>	
11:15 - 12:00 pm.	Chapter 6: <b>Domain 5 – Leadership and Management</b>	
12:00 -1:00 pm	<b>Lunch</b> (in room)	
1:00 - 2:00 pm	Chapter 6: <b>Domain 5 – Leadership and Management (continued)</b>	
2:00 - 3:00 pm	Chapter 7: <b>Domain 6 – Ethics and Accountability</b>	
3:00 - 3:15 pm	<b>Break</b>	
3:15 - 3:45 pm	<b>Application: Domains 5 and 6</b> <i>Small-group work on caselets</i>	
3:45 - 4:15 p.m.	<b>Application: Domains 5 and 6</b> <i>Full-group discussion/Feedback/Q&amp;A regarding caselet outcomes</i>	
4:15 - 5:30 p.m.	<b>Reflection, General Questions, and Wrap-up Discussion</b>	

## PLANNING TIPS

- Assign **one person** – The Site Coordinator – to act as a liaison with the AFP International Headquarters. The Site Coordinator should also serve as the on-site program monitor to act as host during the event (ordinarily, to ensure continuity this should be the same person in both instances, though another may assist if necessary).
- In developing your own promotional materials, please forward to the AFP IHQ a draft of your promotional brochure and other related materials for review prior to printing/distribution.

Please be sure that your promotional materials are clear that there is a separate

application and application fee for the CFRE Exam which must be received by *CFRE International* at least 2 months (60 days) prior to the exam date.

Contact information:

CFRE International  
300 N Washington Street, Suite 504  
Alexandria VA 22314  
phone 703/820-5555.

**Please include the following disclaimer on all communications for the AFP CFRE Refresher Course:**

Participation in the AFP CFRE Refresher Course may assist you in learning or reviewing concepts covered on the Certified Fundraising Executive (CFRE) examination as detailed on the Test Content Outline provided by CFRE International. However, the AFP CFRE Refresher Course is not designed specifically as a prep course for the exam. It is designed to provide a review of concepts one should know at the five-year experience level.

AFP highly recommends that this refresher course be just one of the resources you use in preparing to take the CFRE exam. Your study should also include reading books that appear on the CFRE Resource Reading List.

More specifically, the AFP CFRE Refresher Course focuses on both

- refreshing the fundraising knowledge a professional already has, and
- identifying and helping to fill in gaps in fundraising knowledge.

So, this Course is a most important step in the process of preparing for the CFRE Exam. However – avoid relying solely on this Course and this manual during your exam preparation! Successful candidates often participate in follow up study groups and spend time on their own studying for the exam. CFRE International provides a number of excellent resources, including a candidate handbook, the test-content outline, and a list of reading resources (also provided as handouts as a part of the Refresher Course), available at [www.cfre.org/resources/handbooks](http://www.cfre.org/resources/handbooks). A practice exam is also available on a subscription basis for periods of either 30 or 90 days: [www.cfre.org/practice-exam](http://www.cfre.org/practice-exam). The practice exam does not provide the answers to the exam questions one will face; rather, it primarily helps one understand how the questions are asked and the degree of difficulty involved. We encourage participants to take advantage of these additional resources!

Arrange for meal functions and beverage service within or in very close proximity to the meeting room used for the AFP CFRE Refresher Course.

Chapters should plan to provide breakfast, lunch and morning and afternoon beverage breaks during the conduct of the class of the AFP CFRE Refresher Course.

If the AFP CFRE Refresher Course is being offered as part of a conference where other sessions will be held, you may want to prepare specially marked badges for AFP CFRE Refresher Course attendees (e.g., badges printed on different colored paper or bearing colored dots) as a means of assuring that only

AFP CFRE Refresher Course attendees receive AFP CFRE Refresher Course materials.

Scholarships: It may be helpful to create a scholarship fund to support individuals who, for financial reasons, may be unable to attend the AFP CFRE Refresher Course. Scholarships are not offered through the AFP International Headquarters.

The first sources for scholarship funding may well be the networks used to promote the AFP CFRE Refresher Course. These networks may be willing to sponsor the attendance of a number of employees from their own organizations. Requests to United Way, the state arts council and other state departments, as well as faith-based groups may generate funds for scholarships.

Another source for scholarship funds is local foundations or corporations. These funding sources often have a strong interest in providing technical assistance to encourage the fundraising capabilities of nonprofit organizations.

# **RECRUITING FACULTY (FACILITATORS) FOR THE AFP CFRE REFRESHER COURSE**

- Faculty for the AFP CFRE Refresher Course is selected by the chapter.
- This highly interactive course is designed to be conducted by two (or three) facilitators.
- As you recruit, obtain and assemble information on their relevant qualifications from each. Look at them in three segments:
  - Directly AFP related – CFRE, ACFRE, AFP Master Trainer
  - Relevant Education – such as EdD, MBA, JD, etc.
  - Relevant Experience

By relevant, we mean relevant to the course, especially the domains(s), which each trainer is conducting. Faculty should be not only subject matter experts, but also effective teachers as facilitators. This is NOT a lecture course. Just a short paragraph on each can suffice. This list will serve as a Bio sheet to distribute to participants.

## **Requirements of Faculty – Each faculty member must:**

- Have a minimum of a current CFRE or ACFRE credential
- Have facilitation skills and – prior to the class – participate in a special free recorded 52-minute Webinar session titled “How to Facilitate the AFP CFRE Refresher Course.” Please direct your recruited faculty to this link to sign on and participate: <http://videos.afpmembers.org>  
And then, please confirm when all faculty have completed this training.
- Be knowledgeable about the subjects in the Domains
- Be able to communicate effectively in front of a group.
- Carefully read, fill in requested information, sign and **submit two forms** to the Site Coordinator, who then forwards all the signed faculty forms to AFP IHQ for approval. These two required forms are:
  - TRAINER APPLICATION FORM for the AFP CFRE Refresher Course (included below)  
– addresses matters related to the needed facilitation skills and subject matter knowledge of each faculty member.
  - FACULTY AGREEMENT FORM for the AFP CFRE Refresher Course (included below)  
– addresses commitment to respect and follow requirements related to the use of intellectual property of AFP and maintaining a consistent standard.

## **AFP Master Trainers**

- An AFP Master Trainer list of individuals who have graduated from AFP’s Faculty Training Academy (FTA) is available from AFP IHQ. Be sure to utilize this list in your recruitment.
- FTA graduates have been trained in adult learning theory and teaching techniques. They are willing to serve as instructors and as resources to your AFP CFRE Review Course faculty. They are also available by phone to offer suggestions on how to select good instructors. Any travel and lodging expenses for these individuals are the responsibility of the chapter.

## **Other Considerations**

- Individuals who are retired but who held the CFRE credential at the time of retirement also may be eligible to teach.
- You should plan to have a back-up facilitator available in case someone arrives late or fails to arrive.
- In selecting faculty members, please strive for diversity in gender, ethnicity and organizational type as well as relevant qualifications.

## **Timing**

- By at least 4-6 weeks prior to the course, but ideally much earlier, complete recruitment of all faculty members and send to AFP IHQ
  - List of all faculty, with their credentials and other qualifying information, ideally in the form of short bio's
  - Class Agenda which indicates all assigned faculty by name
  - For each Faculty Member, completed and signed
    - TRAINER APPLICATION FORM
    - FACULTY AGREEMENT FORM
- AFP IHQ will provide needed faculty materials to the site coordinator, who then will provide to all Faculty members, to give them plenty of time to prepare.

**PLEASE NOTE:** We cannot emphasize too much *how critically important faculty preparation, including pre-class practice, is to the success of this course.* Be sure to provide faculty their materials many weeks in advance, so that they have plenty of time to prepare. Ideally, they will include practice with their co-facilitator as a part of their preparations. This need keeps coming out in the post class evaluations, along with the need for effective facilitation skills.

## **Role of the Facilitator**

The tasks for the facilitators are a combination of brief presentations on the primary content of the Domains and group facilitation for the caselet process.

- Domain refreshers are not intended to be comprehensive, but rather a brief review of domain content with PowerPoint slides. Each Domain has approximately 15 minutes allotted. The purpose is to establish a framework for the group work to follow.
- Caselets are designed to allow participants to apply Domain knowledge to realistic scenarios working with a group of 4-5 course participants and recording responses to questions.
- The facilitator role for the caselet process is to introduce the approach (needed only for the first group of Domains), monitor the work of the groups and lead the discussion of the results at the conclusion of the case work section. The facilitator affirms correct solutions, answers questions and provides guidance as needed on classic approaches.
- The facilitator is also responsible for keeping the course on pace and maintaining the time allotted on the agenda.

## **MARKETING THE AFP CFRE REFRESHER COURSE**

It is recommended that a local planning committee be established to promote the AFP CFRE Refresher Course. In addition to sponsoring the AFP CFRE Refresher Course with other AFP chapters, it can also be effective to create a partnership with other local chapters of related organizations (such as ALDE chapters, local Planned Giving Councils, AHP regions, etc.) or other local service providers such as the United Way, the Voluntary Action Center or Support Center, a continuing education program within an institution of higher education, etc.

## **Targeting the Market**

The marketing effort begins as soon as the signed Host Agreement Form is forwarded to the AFP International Headquarters. Marketing this program is very much like marketing the fundraising effort for an institution. First, the general markets must be targeted, then specific prospects within each market must be identified.

### **Primary markets are:**

- members of area AFP chapters who have 3 to 6 years of experience;
- attendees of past AFP chapter programs;
- fundraising professionals in your chapter's area who are not currently members of AFP, but may be on a prospect list;

### **Additional markets include:**

- advocacy organizations
- arts, cultural and historical organizations
- educational institutions including private, parochial, alternative and public schools and colleges and universities
- environmental groups
- health and human service organizations
- religious groups, synagogues and churches
- United Way agencies

## **Marketing Strategies**

After the prospects have been identified, the planning committee must develop appropriate marketing strategies. The planning committee should also brainstorm local networks that might be useful to help promote the program.

### **1. Developing promotional materials**

- Sample language for AFP CFRE Refresher Course **fliers** can be found in this toolkit.

- **Remember:** materials should be targeted to the needs of your audience. You can brainstorm effective promotional messages and then test them with likely audiences before going to print. For example, audiences might respond to:

*Improve your ability to pass the CFRE Exam!*

*Improve your development office!*

*Learn how to raise more money more efficiently!*

*Want to start a development office in your organization?*

- If you have a local individual(s) who has attended the CFRE Review/Refresher Course in the past, ask this individual to provide testimonial for use in promotional materials.

## 2. Using local networks

An important marketing strategy is to secure endorsements of networks to which your members may belong. These networks may be able to provide promotional support. For example, make arrangements with a network leader to direct a personalized letter to members. The letter can recommend attendance at the AFP CFRE Refresher Course. The hosting chapter should provide a draft letter and a registration reply card.

Local networks might include:

- Faith-based groups, e.g., Catholic and Episcopal Charities, Council of Churches, etc.
- State agencies/departments with sub grantees including the state council on the arts and humanities; departments of health, elderly affairs and human services;
- United Way and the United Way Management Assistance Program (MAP)

## 3. Ensuring personal follow-up

Even after local networks have been used and the promotional materials released, it may be necessary to do personal follow-up to prospective participants in order to ensure maximum attendance.

Targeted prospects within each market should receive a telephone call. A script of key points to cover in the telephone call can be developed by the planning committee. Members of the planning committee as well as the AFP chapter Board of Directors should be assigned to call the prospects they know best.

## 4. Promotional Posting on Chapter Webpages

Be sure to set up a page on your Chapter's Webpages with informational promotion language. Then use this link in all your communications where you say "for more information and to register . . . "

Here is some sample language to get you started:

# AFP CFRE Refresher Course

<Month, Day, Year Posted>

## Attend the AFP CFRE Refresher Course in <City, State> on <Class Dates>

Advance your journey toward CFRE certification through the self-exploration of knowledge and peer exchange of best practices — facilitated by knowledgeable fundraising practitioners — with the AFP CFRE Refresher Course.

### Who Should Attend

Anyone seeking to earn the CFRE certification – for the first time or to recertify, and who can meet the minimum requirements set by CFRE International (<http://www.cfre.org/apply/requirements/>) by the date of the CFRE Exam.

### About the Course

The **AFP CFRE Refresher Course** on <dates>, offers development professionals like you a new approach that asks you to apply fundraising theory, skills and techniques within the six knowledge domains of the field, based on experience at the level of five-years and above. The course is not presented in a lecture format; rather, it is a combination of a high-level review, self-exploration of knowledge and peer exchange of best practices – all of which are based on using a case study approach.

The course also is appropriate for CEOs and members of the board and development committee, adding tremendous knowledge of fundraising practice to an organization's operations and governance.

**Facilitators:** < List each facilitator – with full name and credentials e.g. CFRE, ACFRE, MBA, EdD; LLB, etc.>

### Agenda

Download the Agenda for the class <[here](#)>

### Participants Receive

- Reception: 5:30-6:30 p.m., <Day of the Week>, <Month-Day Year>
- Continental breakfast and lunch
- Participant manual
- Approximately 16 hours of instruction
- Certificate of completion at the end of the course
- Applicable for 16 **points** in Category 1.B – Education of the CFRE application
- Head start for taking the CFRE Exam

### Cost

AFP Members = \$390

Non-Members = \$490

## REGISTER for the Course TODAY

Seats for the course are limited to allow for maximum interaction and learning. Registrations will be accepted until <Month, Day>. For more information, contact <Site Coordinator's Name, ACFRE>, at <[e-mail address](#)> or <[contact phone number](#)>

To register for the Course click [HERE](#)

## **Hotel Accommodations**

The <XYZ Hotel> is within walking distance to the classroom location <venue name and street address>, as well as excellent restaurants and <appealing> attractions such as the . . .

Special room rates for the AFP CFRE Refresher Course are available <[link to room rate information](#)> -- such as: Enter your arrival and departure dates to begin the reservation process. Or, call the hotel direct at <[hotel reservation phone number](#)> and provide your arrival date and group name – <[Reservation code for AFP CFRE Refresher Course](#)>

All reservations must be made prior to the cutoff date of <[Month, Day, Year](#)> in order to secure the discounted rate.

## **About <The City/Town where the class is held>**

What better place to speed your journey than <[the host city](#)> <[stating attributes that should appeal to the person from out of town](#)>

*Please note:*

*Participation in the AFP CFRE Refresher Course may assist you in learning or reviewing concepts covered on the Certified Fundraising Executive (CFRE) examination as detailed on the Test Content Outline provided by CFRE International. However, the AFP CFRE Refresher Course is not designed specifically as a prep course for the exam. It is designed to provide a review of concepts one should know at the five-year experience level.*

*AFP highly recommends that this refresher course be just one of the resources you use in preparing to take the CFRE exam. Your study should also include reading books that appear on the CFRE Resource Reading List.*

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# **ONSITE CHECKLIST FOR AFP CFRE REFRESHER COURSE**

## **by SITE COORDINATOR**

- × Here are some basic requirements for the site, which will be used for the AFP CFRE Refresher Course:
  1. Meeting room that will easily accommodate 25-30 individuals at 60" round tables (no more than 5 participants to a table). With the usual chapter size class of around 10-20, the room need not be larger than it has been in the past. The facilitator manual recommends 4-5 people per round table, and one flipchart per table. So, if the class size is 20, there would be 4-5 tables and 4-5 flipcharts.
  2. Flip chart, easel, and colored markers for each table
  3. Lectern with microphone for facilitators
  4. Projector/screen easily visible to all participants
  5. Table for two facilitators
  6. Table for site coordinator where participants will check in
  7. Name tents, printed on both sides, for each participant
  8. Certificates of completion for each participant
- × Arrangements for food:
  - Continental breakfast available 45 minutes before session begins
  - Breaks should include beverages and if possible, snack food items (this is an energy demanding session)
  - Lunch in the room at the break (participants DO NOT have time to leave for lunch)
  - Meal costs built into the cost for the course
- × On the day of AFP CFRE Refresher Course, arrive by no later than 7:00 a.m. Check that room is set-up correctly (tables, chairs, computer LCD projector, screen, flipchart(s), table for presenter in front of room, and registration table).
- × Place sign-in sheet, agenda copies and other handouts (including copies of the evaluation form), participant roster, and participant manuals on registration desk. Lay out name badges - alpha by last name makes it easy to find participants' names. Have blank badges and markers ready for on-site registrants.
- × Lay out faculty name badges.
- × Set out any AFP promotional materials.
- × As participants arrive, give them their name badge, manual, agenda, and participant list.
- × **Important:** Have every participant sign the sign-in sheet. This sheet **must** be signed in order

for a participant to receive a certificate. **It is the responsibility of The On-Site Coordinator** to be sure all participants sign the roster at the beginning of each day and remain in the room throughout the entire class of the AFP CFRE Refresher Course (except during breaks).

- ×
- Any unregistered participants should complete an on-site registration form and sign in on the sign-in sheet. On-site registrants may pay on-site by check or credit card depending on how the chapter is able to collect money.
- ×
- As faculty members arrive, give them their name badges. Have someone available to assist them setting up. Let each faculty member know you will signal them when they have five (5) minutes remaining in their session.
- ×
- At the designated starting time, begin the class of the AFP CFRE Refresher Course with introductions.
- ×
- Introduce each faculty member.
- ×
- Distribute copies of the Evaluation Form for this class to all participants **at the start of the class**. Request that – as appropriate -- they
  - Fill it out as the class progresses.
  - Then, complete the form before leaving the classroom on the last day, and
  - Hand it in directly to you, the on-site coordinator before they leave.
- ×
- Announce when breaks begin and end, and where food is being served if you are providing lunch. Be persistent in getting the program started on time after each break.
- ×
- Signal each faculty member when five (5) minutes remain in each segment. At the end of the class, publicly thank the faculty member.
- ×
- Towards the end of the day, insert participant names and sign the certificate of completion for each participant who has attended the entire AFP CFRE Refresher Course.
- ×
- Upon completion of the course, collect copies of the completed evaluation form from each participant prior to their leaving the classroom.
- ×
- Distribute the certificates of completion, and thank everyone for attending.
- ×
- Store in a safe place any unused participant manuals for use in a future class.
- ×
- Prepare key documents for sending back by e-mail to the AFP IHQ **within 3 days** of the course. Be sure to send all of the following to [AFPIInternationalConference@afpnet.org](mailto:AFPIInternationalConference@afpnet.org):

- Scanned copy of the Sign-In sheet(s) – with member or non-member indicated for each
- Final Registration List (including whether AFP Member or Non-Member and email address for each participant)
- Copy of the final course agenda **with names of all faculty who participated**

**ALSO**

Please scan to PDF all the completed participant evaluation forms, and e-mail them all to Kendall Joyner at [KJoyner@afpnet.org](mailto:KJoyner@afpnet.org)

Congratulations and thank you! Your class of the AFP CFRE Refresher Course is completed!

**IMPORTANT NOTE! BEFORE PLANNING THIS COURSE READ CAREFULLY THROUGH THE ENTIRE HOST TOOLKIT.**

**ASSOCIATION OF FUNDRAISING PROFESSIONALS  
AFP CFRE REFRESHER COURSE HOST AGREEMENT 2018**

**The AFP CFRE Refresher Course (formerly AFP CFRE Review Course)** is a, facilitator-led program offering experienced fundraising professionals opportunity to review the main components of a complete fundraising program. It is not a prerequisite for the Certified Fundraising Executive Examination nor is it a prep for the CFRE Exam but instead is a refresh of the body of knowledge at the five-year level which many individuals use in studying for the exam. It is targeted at professionals with five or more years of fundraising experience. The suggested fees for the **AFP CFRE Refresher Course** are \$390 AFP members and \$490 nonmembers. Chapters may change the registration fees but the financial arrangements that follow remain the same.

Note: A deposit fee of \$1,000.00 in US Dollars must be received once the decision has been made to host the course to cover faculty and participant product. **The deposit should be provided as early as possible; but it must be received no later than 60 days prior to the planned start date of the Course, or the course will not be conducted as scheduled.** If the class is cancelled after receiving faculty/participant materials, the host/sponsoring chapter(s) will receive an invoice for shipping and fulfillment and will be required to return all materials to AFP IHQ. **Once paid, the deposit is not returned in the event of a cancellation but rather applied to a future course.**

### **Financial Arrangements**

All expenses related to the course (meeting room, meals, breaks, faculty travel expenses, faculty gifts) will be paid by course host(s). Course host(s) may charge course registrants a fee higher than the normal course fee if extra funds are needed to cover expenses related to supplementary meals or functions (e.g., a special reception, full breakfast, exhibit hall, etc.). Materials being shipped to Mexico or Canada will incur separate shipping fees. The host is responsible for costs related to return shipping of unused participant manuals. Chapters may retain unused participant manuals for use in future classes; but will be charged \$50/each; redeemed when used in that future class. All payments to AFP IHQ must be made in U.S. Dollars, by credit card or check from a bank account in U.S. Dollars. Exceptions may be made at the discretion of AFP IHQ. AFP Chapters have the option of hosting the course as a Joint Venture OR a Franchise Fee. These options are described in more detail below:

#### **Joint Venture**

The course host(s) will collect registration fees, and will reimburse the AFP Service Office **\$195** member/**\$245** non-member per participant. The course host(s) will reimburse the AFP Service Office **\$50** per unused participant manual. All fees are to be paid in US Dollars.

#### **Franchise Fee**

The franchise fee is **\$2,900.00** per one-time use of the **AFP CFRE Refresher Course**. The course host(s) will collect all course registration fees. The course host(s) will payout **\$2,900.00** plus **\$50.00** per participant. You will not be charged for unused manuals returned to AFP IHQ.

**NOTE: Materials shipped to Mexico or Canada will incur separate shipping fees, charged to the host chapter.**

#### **AFP IHQ Responsibilities:**

- Approving course faculty
- Providing course materials to chapter Site Coordinator (Faculty materials and participant manuals, non-disclosure agreement and application form, certificate templates, sign-in sheets)

#### **Course Host(s) Responsibilities:**

- Selecting The Site Coordinator, who will be the primary Point of Contact with AFP IHQ regarding the class planning, conduct and follow through and who will coordinate all aspects from start to finish.
- Selecting a meeting facility and making on-site food and beverage arrangements
- Establishing online registration, providing the link to AFP IHQ, and using in all promotion.
- Completing, signing, submitting the Host Agreement Form and \$1,000 deposit (at least 90 days prior to the stated start date on the Agreement Form),
- Providing street address (not PO Box) for the shipment of manuals, certificates, etc. Shipments come either UPS or FedEx..
- Selecting faculty who meet all requirements (contact AFP IHQ for this, including FTA Master Trainer list), and having each facilitator complete and submit to the Site Coordinator the Faculty Agreement Form and The Trainer Application Form. Then, forward all the forms and agreements to AFP IHQ.
- Dispersing faculty materials to individual faculty once materials are received from AFP IHQ
- Registering participants; collecting registration fees
- Marketing the program
- Designating The Site Coordinator to greet participants, introduce faculty and handle other on-site logistics for the course.
- Provide AFP IHQ, within 3 days of the class, the Final Registration List (including who is AFP Member), Completed Sign-In Sheet(s), Final Agenda with names of all actual faculty and indicated times when they were facilitating.

\*See **AFP CFRE Refresher Course Guidelines** in Host Toolkit for more detail on responsibilities of IHQ and host/sponsoring chapter(s).

## **AFP CFRE REFRESHER COURSE HOST AGREEMENT FORM FOR 2018**

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The \_\_\_\_\_ Chapters(s)/Conference agrees to host the AFP CFRE Refresher Course in \_\_\_\_\_ (city, state) on \_\_\_\_\_ (dates).

The Chapter is hosting the course as a \_\_\_\_\_ Joint Venture or as a \_\_\_\_\_ Franchise Fee (described above). List the chapter's or other contact who will be **The Site Coordinator** in charge of coordinating this course and the primary point of contact with AFP IHQ for all matters related to this class:

Name \_\_\_\_\_  
Organization \_\_\_\_\_  
Address \_\_\_\_\_  
City/State/ZIP \_\_\_\_\_  
Phone \_\_\_\_\_ Fax \_\_\_\_\_  
E-Mail \_\_\_\_\_

To whom and to where would you like participant materials shipped? Provide complete street address:

(NOTE: Need this to be a **street address**. Can't ship to a PO Box. Please provide phone and e-mail also.)

Please list below the **location of where the class will be held, with organization name, full street address, phone and fax numbers:**

Location \_\_\_\_\_  
Street Address \_\_\_\_\_  
City, State or Province, Zip/Postal Code \_\_\_\_\_  
Phone \_\_\_\_\_ Fax \_\_\_\_\_

If the course host(s) plans to charge participants an additional fee (for extra meals or services), please list the total fee amount:

Base fee **\$390 +** \_\_\_\_\_ = \$ \_\_\_\_\_ AFP Members

Base fee **\$490 +** \_\_\_\_\_ = \$ \_\_\_\_\_ All Others

I have discussed the option checked above with my Chapter/Organization Board and agree to the terms as stated. If the AFP CFRE Refresher Course is being co-sponsored with another host, the signature of each course host president is required.

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*Signature of Chapter/Organization President*

*Chapter/Organization*

*Date*

---

*Signature of Chapter/Organization President*

*Chapter/Organization*

*Date*

The AFP CFRE Refresher Course is a copyrighted course and may not be reproduced without the express written permission of the Association of Fundraising Professionals, International Headquarters. **Please complete this two-page Host Agreement form and return it to AFP, ATTN: Professional Development Div., 4300 Wilson Blvd., Suite 300, Arlington, VA 22203; fax 703/684-0540 or via email at [AFPInternationalConference@afpnet.org](mailto:AFPInternationalConference@afpnet.org)**

**IMPORTANT NOTE! BEFORE PLANNING, READ CAREFULLY THROUGH THE ENTIRE HOST TOOLKIT.**



## Faculty Agreement Form for AFP CFRE Refresher Course

I certify that I currently hold the CFRE and/or ACFRE credential.

I agree to participate in the required training specific to leading this course prior to the course offering.

As an AFP CFRE Review Course instructor, I agree to:

--deliver the course content as it is presented in the faculty manual. I understand that, time permitting, I may make a personal observation so long as I clearly state it is my own opinion and not that of AFP. If I am unable or unwilling to facilitate this course as it appears in this manual, I will withdraw from any faculty assignments affected.

-- use the faculty and participant materials for one-time use only in an authorized, contracted AFP CFRE Refresher Course. I understand that this one-time use applies to all elements of the course including faculty manual, participant manual, and PowerPoint presentation. This agreement does not imply a license or right, whatsoever concerning the intellectual property of AFP. For the purposes of this Agreement, "intellectual property" shall mean: all materials with copyright, trademarks and service marks registered and/or used by AFP, as well as any right, invention (patented or not), industrial designs, utility models, confidential information, commercial names, commercial signs, copyrights, domains. Further, it includes any other intellectual property right protected by law. The course materials are the exclusive property of AFP and are protected by federal copyright law. Any, and any other form of intellectual property of AFP, may not be reproduced or used for any other purpose without the express written permission from AFP International Headquarters.

--avoid any appearance of commercialism. I understand that this program is an educational event, not a sales or marketing platform. I agree that my presentation will be an objective review of the topic on which I am presenting, and will not contain any content that is a sales or promotional pitch for any specific product(s), service(s) or company(ies), including my own, particularly those that may compete with AFP.

--refrain from making any statements contrary to the best interests of AFP.

---

Print Name

Signature

Date

---

Date(s) Course conducted

Location (City, State, Country) Conducted

Please return this signed form as soon as possible by e-mail or regular mail – directly to the Site Coordinator for the upcoming course offering.



## TRAINER APPLICATION FORM

### AFP CFRE Refresher Course

Name \_\_\_\_\_ Title \_\_\_\_\_

Organization \_\_\_\_\_

Street Address \_\_\_\_\_ City \_\_\_\_\_

State/Province \_\_\_\_\_ Zip/Postal Code \_\_\_\_\_

Email Address \_\_\_\_\_ Phone Number \_\_\_\_\_

Are you currently a CFRE? \_\_\_\_\_ If so, what year were you originally certified? \_\_\_\_\_

When was your most recent certification? \_\_\_\_\_

Are you an ACFRE?: \_\_\_\_\_ If so, what year were you certified? \_\_\_\_\_

Have you completed the AFP Faculty Training Academy? If so, what year? \_\_\_\_\_

DOMAIN knowledge self-assessment (place a check mark in the appropriate column):

Domain/Knowledge Self-Assessment	Basic	Intermediate	Advanced	Expert
Current and Prospective Donor Research				
Securing the Gift				
Relationship Building				
Volunteer Involvement				
Leadership and Management				
Ethics and Accountability				

Have you previously taught/facilitated an AFP course? If so, please list the title of the course, month/year and location.

What do you consider to be the best approach for adult learning?

What experience have you had facilitating the work of professional peers in fundraising?

Please provide at least two examples of work you have done with diverse groups of learners.

How would others characterize your style in working with groups?



I agree to participate in the required webinar training specific to each AFP course, and to adhere to the philosophy and approach embedded in the course.

---

Signature

---

Date

Please return this signed form by e-mail or regular mail directly to the Site Coordinator for the upcoming class. The Site Coordinator will forward it to AFP IHQ.



Approved Provider for  
Continuing Education

## AFP CFRE Refresher Course

The **AFP CFRE Refresher Course** offers development professionals an opportunity to review the main components of a complete fundraising program. It is an intensive program intended to provide an overview of the six knowledge domains of the CFRE exam. The course is not presented in a lecture format; rather, it is a combination of a high-level review, self-exploration of knowledge and peer exchange of best practices – all of which are facilitated by a knowledgeable fundraising practitioner using a caselet approach with components based on fundraising experience at the **five-year level**. Full participation in the **AFP CFRE Refresher Course** is applicable for **16 points (if two-day, 8 points if one-day)** in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.

### Domains include:

1. Current and Prospective Donor Research
2. Securing the Gift
3. Relationship Building
4. Volunteer Involvement
5. Leadership and Management
6. Ethics, Accountability and Professionalism

### **Participants receive:**

- Participant manual
- Approximately 16 (or) 8 hours of facilitated, interactive learning
- A certificate of completion at the end of the course

### **Faculty members receive:**

- Faculty materials, including a detailed faculty manual and PowerPoint slides

### **Course hosts receive:**

- An improved planning kit
- Assistance from AFP IHQ staff in planning the course
- Promotion of the course through the AFP website

**Recommended registration fee: \$390 AFP members/ \$490 non-members**

For more information on the course, please visit [www.afpnet.org/professional](http://www.afpnet.org/professional) or contact Professional Development at [jhendrickson@afpnet.org](mailto:jhendrickson@afpnet.org), or [kjoyner@afpnet.org](mailto:kjoyner@afpnet.org).

For more information on CFRE certification, contact CFRE International at [cfre.org](http://cfre.org).

## The AFP CFRE Refresher Course

The AFP CFRE Refresher Course is an intensive (8- or 16-hour) program intended to provide an overview of the six knowledge domains of the CFRE exam. The course is not presented in a lecture format; rather, it is a combination of a high-level review, self-exploration of knowledge and peer exchange of best practices – all of which are facilitated by a knowledgeable fundraising practitioner using a caselet approach. The knowledge domains:

1. Current and Prospective Donor Research
2. Securing the Gift
3. Relationship Building
4. Volunteer Involvement
5. Leadership and Management
6. Ethics, Accountability and Professionalism

**Class hours:**  
8:00 a.m. - 5:00 p.m.

### CFRE Professional Certification Program

The Certified Fund Raising Executive (CFRE) professional certification program, is governed and administered by CFRE Professional Certification Board, an independent international organization working with thirteen participating organizations, including Association of Christian Development Professionals, Association of Fundraising Consultants-U.K., Association of Fundraising Professionals, Association of Healthcare Philanthropy, Association of Lutheran Development Executives, Canadian Association of Gift Planners \* Association canadienne des professionnels en dons planifiés, Council for Resource Development, Fundraising Institute Australia, Fundraising

Institute of New Zealand, International Catholic Stewardship Council, National Catholic Development Conference, North American YMCA Development Organization and Philanthropic Service for Institutions. The CFRE program offers fundraising professionals with five years or more experience an opportunity to earn recognition for their experience and professionalism.

The designation “Certified Fund Raising Executive” (CFRE) is a mark of distinction, providing heightened professional recognition and greater career options and earning potential for fundraising executives.

Candidates must complete a separate application for certification and submit all fees 60 days prior to the exam. No applications will be accepted less than 60 days prior to the exam.

If you are interested in taking the certification exam, please contact CFRE International to request a certification packet. Phone 703/820-5555; fax: 703/820-1117; or download from the website at [www.cfre.org](http://www.cfre.org).

### Course Location and Cost Information

For more information on AFP's other educational programs, contact the Professional Development Division, AFP International Headquarters, 4300 Wilson Blvd., Suite 300, Arlington, VA 22203. E-mail: [AFPIInternationalConference@afpnet.org](mailto:AFPIInternationalConference@afpnet.org) or [poadv@afpnet.org](mailto:poadv@afpnet.org)

### Course Registration Form

Location and Date(s): \_\_\_\_\_  
\_\_\_\_\_

Name: \_\_\_\_\_

Membership I.D. #: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Email: \_\_\_\_\_

Payment for the AFP CFRE Refresher Course must accompany this form.

- Check Enclosed  
 Visa/MasterCard/American Express

Number: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Please send payment to:  
[chapter contact information]

## **SAMPLE OF AFP CFRE REFRESHER COURSE SIGN-IN SHEET**