

PROFESSIONAL PERFORMANCE: 55 points (must be within the past 5 years)

Candidates can earn points in any of the following three areas, or a combination thereof. It is not necessary to document points in each of the categories.

- **Actual funds raised:** 1 point = Equivalent raised in candidate's local currency of USD 25,000. Fundraisers in non-OECD member countries will receive 1 additional point for each point of Actual Funds Raised.
- **Communications projects:** 5 points for each project with outcomes that had a measurable impact on the success of fundraising for the organization.
- **Management projects:** 5 points for each project with outcomes that had a measurable impact on the success of fundraising for the organization.

A project is a temporary endeavor with a unique result. Each project must have a definite beginning and end. The project's end is defined by the achievement of the project's objectives or when the project is terminated.

In contrast, an ongoing work effort or repetitive process that follows an organisation's existing procedures would not be considered a project. Incomplete projects will not be accepted.

CFRE INTERNATIONAL

Founded in 2001, CFRE International is an independent nonprofit organization, the sole mission of which is dedicated to setting standards in philanthropy through a valid and reliable certification process for fundraising professionals.

CFRE (CERTIFIED FUND RAISING EXECUTIVE) CERTIFICATION

CFRE (Certified Fund Raising Executive) is the only accredited certification for philanthropic fundraising professionals in the world. In today highly demanding environment, in-depth knowledge, professional experience and ethical accountability are vital in achieving fundraising success. Over two decades, CFRE has been certifying fundraising professionals worldwide. There are more than 6,300 CFRE certificants from over 25 countries and the number of CFRE certificants is growing gradually in Hong Kong and the mainland China.

Testing on six knowledge area domains namely donor research, securing the gift, relationship building, volunteer involvement, leadership and management, and ethics, accountability and professionalism, CFRE examinations differentiate those who have fundraising experience, professional knowledge and commitment and takes philanthropic fundraising to a higher professional level. No matter in which segment of the nonprofit sectors such as healthcare, education or the arts, professional fundraisers are always highly sought.

BENEFITS OF BECOMING A CFRE

Career advantages and advancement. Stand out on the job hunt. CFRE certification can give you the "edge" when being considered for a promotion or other career opportunities. That's why 89 percent of CFREs say the certification has enhanced their professional opportunities.

Greater earnings potential. The 2018 Compensation and Benefits Study conducted by the Association of Fundraising Professionals shows that in 2018, CFRE certificants in the United States earned on average USD\$21,000 more than their non-certified counterparts. In Canada, CFRE certificants earned on average USD\$38,000 more than their non-certified counterparts.

In fact, 83% of CFRE certificants say earning their CFRE has had value in increasing their salary.

Access to a worldwide network of your peers. Whether you're working toward your CFRE or are already a CFRE, you are given exclusive access to CFRE Central, its online community where fundraising professionals worldwide can come together.

Reflects your personal and professional achievement. CFRE shows you have displayed mastery of the field by meeting requirements and standards set in philanthropy. Nearly 99% of CFRE certificants say earning their CFRE gave them a sense of personal achievement.

Recognition from peers. More than 93% of CFRE certificants say they have gained increased recognition from peers by earning their certification.

The world will know you're a CFRE

All current CFRE certificants receive a certificate suitable for framing, a digital badge to use online, and their name appears in the Find a CFRE tool (<http://www.cfre.org/find-a-cfre/>).

ABOUT HKMA

The Hong Kong Management Association (HKMA) is the first CFRE participating organization in Hong Kong, joining other 28 in the rest of the world. Established in 1960, the HKMA is a non-profit-making organization which aims to be the leading professional organization advancing management excellence in Hong Kong and the Region. Services provided by the HKMA can be categorized into three major areas, namely education and training, management services and membership services. With a commitment to nurturing human capital through management education and training at all levels, the HKMA offers over 2,000 training and education programs covering a wide range of management disciplines including fundraising management for more than 30,000 executives every year.

The HKMA believes "learning while networking" works best for achieving continuous development. On top of training and education, the HKMA also offers other management services and activities, including business awards, specialist clubs, and a series of forums and seminars throughout the year on the latest management and business issues in Hong Kong and internationally.



Diploma Programme



Executive Diploma in Fundraising Management

A Pathway Leading to
CFRE (Certified Fund Raising Executive) Certification



EXECUTIVE DIPLOMA IN FUNDRAISING MANAGEMENT

INTRODUCTION

Nowadays, non-profit organizations often maintain their operations through fund-raising. In order to secure funds, fundraisers should offer professional service with commitment and accountability to make a difference for good, in particular, donor relations, planning, managing and evaluating fundraising campaigns; marketing and fundraising in the nonprofit sector; ethics and professionalism, or gift planning, corporate fundraising, special events, and entrepreneurial fundraising, in addition to a diversity of other cost-efficient fundraising techniques. The demand for high quality fundraising professionals has never been greater.

OBJECTIVES

The Executive Diploma in Fundraising Management program aims to promote the professional practice of fundraising, to enhance individual's knowledge and skills to succeed in the nonprofit sector, in ethical philanthropic fundraising and, in addition, to prepare fundraising executives to take the Certified Fund Raising Executive (CFRE) International examinations.

The curriculum covers all critical aspects of fundraising, from the initial stages of research and planning through to implementation and evaluation. Upon completion, students will:

- increase their understanding and skills of fundraising management in charitable sector
- gain the skills and knowledge to develop, run, and manage successful and leading-edge programs to raise funds for charitable organizations
- learn the most current and cost-effective ways to plan a campaign
- develop and implement a wide range of strategies and tactics for a successful and ethical operation of a comprehensive fundraising program

DESIGNED FOR

The program is designed for executives of organizations in the nonprofit and voluntary sector, and those who are interested in fundraising professionals for career entry, and managers in charitable organizations to expand their fundraising skills and to get certified in their professionalism for career success.

SYLLABUS

Module 1 - Prospect and Donor Research

- Donor Research and Identification
- Donor Management System
- Philanthropy and Giving Psychology
- Prospect and Donor Validation and Rating
- Marketing and Communication

Module 2 - Strategies and Plans

- Developing Case for Support
- Integrated Development Plan
- Strategic Planning
- Solicitation Strategies and Techniques

Module 3 - Relationship Building

- Prospect and Donor Cultivation
- Donor Management and Policy
- Stewardship
- Gift acknowledgement and Recognition

Module 4 - Volunteer Involvement

- Volunteer Recruitment, Training and Empowerment
- Fundraising through Volunteers
- Experienced and Diverse Leadership

Module 5 - Leadership and Management

- Board Leadership and Fundraising Committee
- Developing Philanthropy Culture in Organizations
- Vendors and Fundraising Consultant

Module 6 - Ethics and Accountability

- Professional Bodies
- Ethical Principles in Fundraising
- Accountability
- International Credentials
- Fundraising Profession

ADMISSION REQUIREMENTS

Applicants should fulfil the following requirements:

1. be secondary school graduates (F.5);
2. possess 2 or more years of working experience;
3. have a reasonable command of written/spoken English

LANGUAGE MEDIUM

Cantonese and English, where appropriate

(Course materials, assessments and final examinations will be in English)

FEE

HK\$20,000, payable by 3 instalments

Term 1	HK\$3,300 X 2 modules + Application Fee HK\$200 = HK\$6,800
Term 2	HK\$3,300 X 2 modules = HK\$6,600
Term 3	HK\$3,300 X 2 modules = HK\$6,600

COMPLETION OF A MODULE AND AWARD OF DIPLOMA

Satisfactory Completion of a Module

A minimum of 70% attendance is required for satisfactory completion of a module. Failure to do so will disqualify the student from sitting for the final written examination. Students must obtain an aggregate of 50% at least in the mid-term assessment and the final examination.

Completion of the Executive Diploma in Fundraising Management

Completion of the EDFRM Program requires a student after initial registration to pass the continuous assessments and final written examinations of all six modules in three consecutive terms. A candidate who has satisfied all the requirements will be awarded the Executive Diploma in Fundraising Management.

Unsatisfactory Performance in a Module

On failing any one module at the first attempt, the student may sit once only for the remedial examination in the following term by paying a fee. Students who fail the remedial examination are allowed to retake the module by paying full module fee. However, the maximum time for students to complete the whole program is 2 years.

DISCLAIMER

Participation in the Executive Diploma in Fundraising Management may assist you in learning or reviewing concepts covered on the Certified Fund Raising Executive (CFRE) examination as detailed on the Test Content Outline provided by CFRE International. CFRE International does not sponsor or endorse any educational programs and the Executive Diploma in Fundraising Management was not developed in conjunction with CFRE International.

ENQUIRIES

For course details: Mr Matthew Lee : 3958 4803. Email : matthewlee.hkma.org.hk

General Enquiry & Enrolment : 2774 8500 or 2774 8501 Fax: 2365 1000 <http://www.hkma.org.hk/pd/edfrm>

APPLICATION FOR INITIAL CERTIFICATION CFRE INTERNATIONAL

Full participation in the Executive Diploma in Fundraising Management program is **applicable for 80** points in Category 1.B – Education of the CFRE International application for initial certification and/or recertification.

After passing the examination, you will be **CFRE Certified** which is a professional achievement for executives who would like to pursue their career in fundraising. It increases your career advancement opportunities and connects you with an extensive network of fundraising professionals around the world.

CFRE CERTIFICATION

To earn CFRE certification, fundraising professionals must meet education, professional practice, and professional performance requirements; pass a comprehensive exam on best practices in ethical fundraising; and attest that they are knowledgeable and abide by the International Statement of Ethical Principles in Fundraising as well as laws governing fundraising in their region of practice.

The CFRE is the only accredited, globally recognized certification for fundraising professionals. The CFRE certification program is accredited by the American National Standards Institute (ANSI), which confers independent, widely respected national and international validation of the rigor of CFRE certification. Research shows that accredited certification programs are consistently preferred by employers because they drive quality and improve results.

APPLICATION REQUIREMENTS FOR INITIAL CERTIFICATION

Applications for Initial Certification require candidates to document information in three categories: Education, Professional Practice, and Professional Performance. The application works on a point system.

Candidates must document a minimum number of points in each of the three categories in order to be approved to take the CFRE examination. Your online application at **My CFRE** will automatically calculate points for you.

Your application must be approved before you can be scheduled for the CFRE exam.

Minimum points required in each application category for Initial Certification are:

EDUCATION: 80 points (must be within the past 5 years).

Education includes continuing education on fundraising topics (including conference attendance), academic degrees, teaching on fundraising topics, authoring on fundraising topics, and service learning through volunteer experience. CFRE does not directly offer education. Candidates should choose their own educational programs that provide them with the most benefit, keeping in mind that the length and rigor of a program contribute to its value. Points are awarded as follows:

- **Continuing education:** 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.
- **Authoring:** 5 points per published article (500 words or more; self-published material is ineligible). 15 points per book chapter. 30 points per book.
- **Academic degrees:** 5 points for an associate's degree. 10 points each for a bachelor's, master's, or doctoral degree. For Initial Certification, all academic degrees may be counted, even if the degree was earned more than 5 years ago.
- **Service Learning:** 2 points per year for each ongoing volunteer leadership role. 1 point per year for each instance of general volunteer service (a maximum of 10 will be counted). Volunteer work must be separate from one's employment or contractual obligations with a given organization.

A maximum of 10 points of nonfundraising-related continuing education may also be counted, providing that the nonfundraising-related content develops skills that will help the individual become a more proficient fundraising professional. Sessions on general leadership skills, time management, etc., are examples of nonfundraising-related content that might be applicable.

PROFESSIONAL PRACTICE: 36 points (must be within the past 5 years).

1 month of employment = 1 point. Only 1 point will be awarded for any given month regardless of the number of employers or clients.

Candidates for the CFRE credential must be or have been employed full-time as a professional member of a fundraising staff or as a fundraising consultant to nonprofit organizations; at least 50% of their job duties and responsibilities must consist of fundraising activities, resource development, and/or the management of fund development which results in generation of philanthropic support.

Candidates who are or have been employed half-time (defined by CFRE International as 50% FTE or greater) may also qualify, providing 100% of their job duties and responsibilities consist of fundraising activities, resource development, and/or the management of fund development which results in generation of philanthropic support.

Consultants must submit a client list for the time period claimed as a consultant.

- * For professionals with less than 5 years (60 points) of employment in fundraising, completion of an academic degree in fundraising, and/or an intensive certificate program in fundraising is highly recommended.

* Course contents of all modules may be subject to change if required without prior notice.