



CFRE Resource Reading List
References Appropriate for All Candidates
(Additional Country-Specific Resources Follow)

Once you have reviewed the **CFRE Test Content Outline** and identified areas for your personal focus during your study plan, this chart can help you identify which books are most appropriate for review in each area of the **CFRE Test Content Outline**. Some provide a comprehensive overview of fundraising, while others focus on specific knowledge areas.

COMPREHENSIVE RESOURCES: The resources below are comprehensive in nature, covering each of the six **CFRE** knowledge domains.

- Ciconte, Barbara Kushner and Jeanne G. Jacob. *Fund Raising Basics: A Complete Guide*. Jones and Bartlett, 3rd edition, 2009.
 Dove, Kent E., Jeffrey A. Lindauer and Carolyn P. Madvig. *Conducting a Successful Fundraising Program*. Jossey-Bass Publishers, 2nd edition, 2001.
 Greenfield, James M. *The Nonprofit Handbook: Fundraising*. New York, NY: John Wiley and Sons, Inc., 3rd edition, 2001.
 Tempel, Eugene R, Timothy L. Seiler and Eva E. Aldrich. *Achieving Excellence in Fund Raising*. Jossey-Bass Publishers, 3rd edition, 2010.

DOMAIN-SPECIFIC RESOURCES: The resources below focus on one or more of the six CFRE knowledge domains.

| <u>TITLE</u> | Current and Prospective Donor Research | Securing the Gift | Relationship Building | Volunteer Involvement | Leadership and Management | Ethics and Accountability |
|--|---|--------------------------|------------------------------|------------------------------|----------------------------------|----------------------------------|
| Ahern, Tom and Simone Joyaux. <i>Keep Your Donors: The Guide to Better Communications & Stronger Relationships</i> . New York: John Wiley and Sons, Inc., 2008. | ✓ | ✓ | ✓ | | | ✓ |
| Ashton, Debra. <i>The Complete Guide to Planned Giving: Everything You Need to Know to Compete Successfully for Major Gifts, 3rd ed.</i> Quincy, MA: Ashton Associations, 2001. | | ✓ | | | | |

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|--|---|--------------------------|------------------------------|------------------------------|----------------------------------|----------------------------------|
| Burnett, Ken. <i>Relationship Fundraising: A Donor Based Approach to the Business of Raising Money, 2nd ed.</i> San Francisco: Jossey-Bass, 2002. | ✓ | ✓ | ✓ | ✓ | | |
| Connors, Tracy Daniel. <i>The Nonprofit Handbook: Management, 3rd ed.</i> New York: John Wiley and Sons, Inc., 3 rd edition, 2001. | | | | | ✓ | ✓ |
| Dove, Kent E. <i>Conducting a Successful Annual Giving Program.</i> San Francisco: Jossey-Bass Publishers, 2001. | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Dove, Kent E. <i>Conducting a Successful Capital Campaign, 2nd ed.</i> San Francisco: Jossey-Bass, 2000. | ✓ | ✓ | ✓ | ✓ | ✓ | |
| Dove, Kent E., et al. <i>Conducting a Successful Development Services Program.</i> San Francisco: Jossey-Bass, 2002. | ✓ | | | | ✓ | ✓ |
| Dove, Kent E., Jeffrey A. Lindauer and Carolyn P. Madvig. <i>Conducting a Major Gifts and Planned Giving Program.</i> San Francisco: Jossey-Bass, 2002. | ✓ | ✓ | ✓ | ✓ | ✓ | |
| Fischer, Marilyn. <i>Ethical Decision Making in Fundraising.</i> New York: John Wiley & Sons, Inc., 2000. | | | ✓ | | | ✓ |
| Fredricks, Laura. <i>Developing Major Gifts: Turning Small Donors into Big Contributors.</i> Sudbury, MA: Jones and Bartlett Learning, 2006. | | ✓ | ✓ | | | |
| Grace, Kay Sprinkel. <i>Beyond Fund Raising, 2nd ed.</i> New York: John Wiley and Sons, Inc., 2005. | ✓ | ✓ | ✓ | ✓ | ✓ | |

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|---|---|--------------------------|------------------------------|------------------------------|----------------------------------|----------------------------------|
| Greenfield, James M. <i>Fund Raising: Evaluating and Managing the Fund Development Process, 2nd ed.</i> New York: John Wiley and Sons, Inc., 1999. | | ✓ | ✓ | ✓ | ✓ | ✓ |
| Greenfield, James M. <i>Fund-Raising Fundamentals: A Guide to Annual Giving for Professionals and Volunteers, 2nd ed.</i> New York: John Wiley and Sons, Inc., 2002. | ✓ | ✓ | ✓ | ✓ | ✓ | ✓ |
| Hart, Ted and James M. Greenfield, Pamela M. Gignac and Christopher Carnie. <i>Major Donors: Finding Big Gifts in Your Database and Online.</i> New York: John Wiley and Sons, Inc., 2006 | ✓ | ✓ | | | ✓ | ✓ |
| Hart, Ted, Steve MacLaughlin, James M. Greenfield, and Philip H. Geier, Jr. <i>Internet Management for Nonprofits.</i> New York: John Wiley & Sons, Inc., 2010. | ✓ | ✓ | ✓ | ✓ | | |
| Hogan, Cecilia and David Lamb. <i>Prospect Research: A Primer for Growing Nonprofits, 2nd ed.</i> Jones and Bartlett Learning, 2007. | ✓ | | | | | |
| Joyaux, Simone P. <i>Strategic Fund Development: Building Profitable Relationships That Last, 3rd ed.</i> Aspen Publishers, 2011. | | | ✓ | ✓ | ✓ | ✓ |
| Kihlstedt, Andrea and Catherine P. Schwartz. <i>Capital Campaigns: Strategies That Work, 3rd ed.</i> Aspen Publishers, 2009. | ✓ | ✓ | ✓ | ✓ | | |
| Lautman, Kay Partney. <i>Direct Marketing for Nonprofits.</i> Gaithersburg, MD: Aspen Publishers, 2001. | | ✓ | | | | |

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|---|---|--------------------------|------------------------------|------------------------------|----------------------------------|----------------------------------|
| Pettey, Janice Gow. <i>Ethical Fundraising: A Guide for Nonprofit Boards and Fundraisers</i> . New York: John Wiley and Sons, Inc., 2008 | | ✓ | ✓ | | | ✓ |
| Rosen, Michael J. <i>Donor-Centered Planned Gift Marketing</i> . New York: John Wiley & Sons, Inc., 2011. | ✓ | ✓ | ✓ | | | |
| Warwick, Mal. <i>Revolution in the Mailbox: Your Guide to Successful Direct Mail Fundraising</i> . San Francisco: Jossey-Bass Publishers, 2004. | | ✓ | | | | |

Additional Resource Readings for Canadian Form of Examination

Bourgeois, Donald J. *Charities and Not-for-Profit Fundraising Handbook*. Markham, ON: Lexis-Nexis Butterworths, 2000.

Bourgeois, Donald J. *The Law of Charitable and Non-Profit Organizations*. Markham, ON: Lexis-Nexis Butterworths, 2nd edition, 1996.

Canadian Institute of Chartered Accountants CICA Handbook – Accounting, Part III Financial Reporting for Not-for-profit Organizations, 2011

National Survey on Giving, Volunteering and Participating. Toronto, ON: Imagine Canada. Annual publication.

Minton, Frank and Somers, L. *Planned Giving for Canadians*. Waterdown, ON: Somersmith. Revised 2007; update 2010.

Canada Revenue Agency:

Fundraising by Registered Charities – Guidance, CPS 028, June 2009

Gifts and Official Donation Receipts, IT 110R3, June 1997

Gifts in Kind to Charity & Others, IT 297R2, March 1990

Additional Resource Readings for United Kingdom Form of Examination

Craigmyle and Company, Ltd. *The Craigmyle Guide to Charitable Giving and Taxation*. Craigmyle and Company, Ltd., 2007.

Data Protection Act (1998), Her Majesty's Stationery Office

Day, Andrew and Paul Molloy. *Capital Campaigns: The Compton Way*. Harbury, England: Compton Fundraising Consultants, Ltd., 2005.

Gift Aid Scheme, Finance Act (2000), Inland Revenue (Charities) Her Majesty's Stationery Office.

The Institute of Chartered Secretaries and Administrators, *The Charities Manual: A Complete Guide to Voluntary Organisation Management*, ICSA Publishing Ltd, 2003.

Jay, Elaine and Adrian Sargeant. *Fundraising Management: Analysis, Planning and Practice*. London, England: Routledge, 2004.

The Charities Act (1992). Charity Commission, Her Majesty's Stationery Office.

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Additional Resource Readings for United States Form of Examination

Form 990. Internal Revenue Service. www.irs.gov

Giving USA. Annual publication. www.givingusareports.org

Hopkins, Bruce R. *The First Legal Answer Book for Fund-Raisers*. New York, NY: John Wiley & Sons Inc., 2000.

Hopkins, Bruce R. *The Legal Answer Book for Nonprofit Organizations*. New York, NY: John Wiley & Sons Inc., 1996.

Hopkins, Bruce R. *The Tax Law of Charitable Giving, 4th ed. with recent supplements*. New York, NY: John Wiley & Sons, Inc., 2011.