



# Certificate in Fundraising Excellence (CiFRE)

## *Strengthening ethical fundraising in Texas*

*Sponsored by*

[Texas Association of Nonprofit Organizations \(TANO\)](#)

*Supported by*

[The Center for Community Based & Nonprofit Organizations at Austin Community College \(CCBNO\)](#)

### Overview and Purpose

Top notch, passionate and experienced faculty will lead participants through the 5 month long Certificate in Fundraising Excellence. The program covers all aspects of nonprofit fundraising best practices, focusing on what it takes to be *"A self aware, reflective, ethical fundraising leader with a strong sense of professionalism, commitment and passion for the nonprofit sector"*. See the comprehensive program below.

Ideal participants are individuals who see fundraising as part of their professional and volunteer careers (*a calling*) and who want to interact with and learn from the best in the field. Faculty members are local, regional and national practitioners. Participants have a unique networking opportunity to engage with like-minded colleagues, meet significant forces in the nonprofit arena, and develop a community of practice that will benefit them in their career development.

### You are an ideal candidate, if you are

- A professional or volunteer fund raiser who is seeking greater competence (skills, knowledge and experience);
- Looking to make a career change and want a comprehensive and systematic way to learn and acquire the competencies needed to be an ethical and effective fundraiser;
- A graduate of a nonprofit academic program and looking for a pragmatic, experience-based learning opportunity that will help you advance in your career;
- A fundraising professional seeking further education and credits toward your CiFRE.

This Certificate is based on lessons learned from the highly successful Certificate in Nonprofit Leadership & Management (CNLM), which has over 200 participants and alumni in its first 6 years. CiFRE graduation will be held jointly with the CNLM Class of 2013 on June 5, 2013.



Sessions are on Fridays, 9:00 am to 3:30 pm

TANO is a CFRE Approved Vendor

For more information visit [www.tano.org/CiFRE](http://www.tano.org/CiFRE) or email [barry@tano.org](mailto:barry@tano.org)

## Certificate Schedule (January 25 - June 5, 2013)\*

\* Dates and times are all set; specific sessions subject to change

Friday, January 25, 2013 – 9:00 am – 3:30 pm

### Basic Principles of Fundraising – Orientation to the Program (9:00 am – 12 pm)

#### Faculty:

- **Kenneth L. Gladish**, President & CEO/ Senior Philanthropic Advisor, The Seton Foundations / Seton Family of Hospitals
- **Fayruz Benyousef**, CFRE, Founder & Principal, Fayruz Benyousef Consulting
- **Donna Budak**, CFRE, FAHP, Vice President of Development & Executive Director, The Seton Foundations / Seton Family of Hospitals
- **Barry Silverberg**, President & CEO, Texas Association of Nonprofit Organizations (TANO), Director, Center for Community Based & Nonprofit Organizations at Austin Community College (CCBNO)

#### Session Foci:

- Mission, Vision, Values centered fundraising
- What constitutes fundraising (money or other items – non-cash donations)
- Motivations of Giving
- Integration of fundraising within your organization
- Different types and aspects of fundraising (overview to the course)
- Staffing
- Policies & procedures

### Social Media and E-Giving (1:00 pm – 3:30 pm)

#### Faculty:

- **Julie Niehoff**, Director of Field Education & Development, Constant Contact

#### Session Foci:

- Giving via online tools/website
- Facebook
- Twitter
- Pinterest

**Friday, February 1, 2013 – 9:00 am – 3:30 pm**

**Professional Ethics and Excellence (9:00 am – 12:00 pm)**

**Faculty:**

- **Joe Barry**, MA, Educator, Seton Cove

**Session Foci:**

- Who is a fundraising “professional”?
- How to best present yourself
- Applying a code of practice
- Your elevator pitch
- What every fundraiser should know
- Professional development
- Association of Fundraising Professionals Code of Ethics

**Financial Management, Accounting and Financing (1:00 pm – 3:30 pm)**

**Faculty:**

- **Vernon E. Williams**, Chief Operating Officer, Texas Association of Nonprofit Organizations (TANO)

**Friday, February 22, 2013 – 9:00 am – 3:30 pm**

**Managing Data and Fundraising Infrastructure (9:00 am – 12:00 pm)**

**Faculty:**

- **Ali McLane**, Senior Associate, Bentz Whaley Flessner

**Session Foci:**

- Managing data (systems and software)
- Budgeting
- Staffing
- Policies & procedures
- Evaluation and analysis

**Friday, February 22, 2013 (continued)**

**Law and Regulation of Fundraising (1:00 pm – 3:30 pm)**

**Faculty:**

- **D'Ann Johnson**, *Legal Services Director, Texas Community Building with Attorney Resources (TX CBAR)*

**Session Foci:**

- *State regulated fundraising issues – consumer fraud & gambling:*
  - *Creative fundraising or legal gambling*
  - *Texas Sales Tax collection*
  - *Charitable raffles, bake sales and spaghetti dinners*
  - *Charitable donations of real estate*
  - *One day fundraisers ... and more*
- *Federal fundraising issues affecting 501(c)(3) designation:*
  - *Internal Revenue Service regulations*

**Friday, March 1, 2013 – 9:00 am – 3:30 pm**

**Annual Giving – The Annual Development Process (9:00 am – 3:30 pm)**

**Faculty:**

- **Ann Thompson Haas**, *MBA, FAHP, HPG Fundraising*

**Session Foci:**

- Individual giving
- Corporate giving
- Foundation giving
- Direct mail
- Special events
- Government funding
- Giving Circles/Support groups
- Marketing tools
- Raffles
- Audits

**Friday, March 8, 2013 – 9:00 am – 3:30 pm**

**Grants – Corporate and Foundation Perspectives (9:00 am – 3:30 pm)**

**Faculty:**

- **Nikki Salzillo**, Austin and San Antonio Market Manager for Global Corporate Social Responsibility at Bank of America
- **Russ Gibbs**, D.Min, CFRE, Vice President for Institutional Advancement and Communications, Texas A&M Health Sciences Center (Bryan, TX)

**Session Foci:**

- Corporate Giving – Trends and where it is going
- Foundation Giving
- Metrics and Evaluation

**Friday, March 29, 2013 – 9:00 am – 3:30 pm**

**Creating an Organizational Culture that Supports Fundraising – A Culture of Philanthropy (9:00 am – 3:30 pm)**

**Faculty:**

- **Cookie Gregory Ruiz**, CFRE, Executive Director, Ballet Austin

**Session Foci:**

- Creating a climate of “giving” within your organization
- Role of the Board in fundraising
- Effective use of volunteer leadership
- Identifying, Recruiting and Supporting Volunteers:
- Governance vs. Fundraising Board:

**Friday, April 5, 2013 – 9:00 am – 3:30 pm**

**Donor Centric Communications (9:00 am – 3:30 pm)**

**Faculty:**

- **Ann Thompson Haas**, MBA, FAHP, HPG Fundraising

**Session Foci:**

- Direct Mail
- Newsletters
- Planned giving
- Opportunity to have your communications critiqued by a “master”

**Friday, April 19, 2013 – 9:00 am – 3:30 pm**

**Major Gifts and Special Projects (9:00 am – 3:30 pm)**

**Faculty:**

- **Kathy Friend**, CFRE, Vice President, Arkansas Children's Hospital Foundation

**Session Foci:**

- Discovery and Cultivation
- Acknowledgment
- Stewardship
- Recognition
- Pledge Cards

**Friday, April 26, 2013 – 9:00 am – 3:30 pm**

**Planned Giving (9:00 am – 3:30 pm)**

**Faculty:**

- **Winton Smith**, Estate and Charitable Gift Planning at Law Offices of Winton C. Smith, Jr.

**Session Foci:**

- Timing – when to develop the program?
- Ways to give: The PG vehicles
- What does it take to establish a PG program?
- Necessary tools

Friday, May 3, 2013 – 9:00 am – 3:30 pm

**The Capital Campaign (9:00 am – 3:30 pm)**

**Faculty:**

- **Fayruz Benyousef**, CFRE, Founder & Principal, Fayruz Benyousef Consulting
- **Donna Budak**, CFRE, FAHP, Vice President of Development & Executive Director, The Seton Foundations / Seton Family of Hospitals

**Session Foci:**

- Feasibility study
- Case for support
- Steering Committee / Leadership
- Prospects
- Managing the campaign
- Tools and materials
- Naming opportunities

Friday, May 24, 2013 – 9:00 am – 3:30 pm

**Diversity and Donor Motivations (9:00 am – 3:30 pm)**

**Faculty:**

- **Pam Owens**, President, Edge of Your Seat Consulting

**Session Foci:**

- Understanding the diverse value systems of diverse populations you serve;
- How do different cultures express communal responsibility (e.g., Christians engage in *charity*, Jews engage in *tzedekah*, Muslims engage in *zakah*, etc.)
- What are the different motivations and ways diverse groups relate to giving and fundraising?
- Effective approaches to specific cultures
- Ethics
- *The Seven Faces of Philanthropy*

Wednesday, June 5, 2013 – 6:30 pm

**Joint Graduation with Certificate in Nonprofit Leadership & Management Class**



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## CiFRE Planning Committee

- ***Fayruz Benyousef***, CFRE, Founder & Principal, Fayruz Benyousef Consulting
- ***Donna Budak***, CFRE, FAHP, Vice President of Development & Executive Director, The Seton Foundations / Seton Family of Hospitals
- ***Barry Silverberg***, President & CEO, Texas Association of Nonprofit Organizations (TANO)
- ***Lisa Dent***, Coordinator, Center for Community-Based & Nonprofit Organizations at Austin Community College

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Approved Provider for  
Continuing Education

The Certificate in Fundraising Excellence (CiFRE) offers 60.5 Education Points through CFRE International. This program will supply a substantial portion of CFRE Education points required to complete CFRE International Certification.

*Full participation in the TANO Certificate in Fundraising Excellence is applicable for up to 60.5 continuing education points in Category 1.B - Education of the CFRE International application for initial certification and/or recertification.*

Scan for more information:

