

ALPHABET SOUP OR STRATEGIC ADVANTAGE?

*THE ROLE OF PROFESSIONAL DESIGNATIONS
IN FUNDRAISING CAREERS*

Crystal Logan, MS, CAP
Megan Crane, MNM, CSPG
Katie Colhoff, MBA, CFRE

2026 NWPGRT Conference



MEET THE PANELISTS

Katie Colhoff, MBA, CFRE

Legacy Health System – *Vice President of Philanthropy*

Katie has played pivotal roles in advancing philanthropy as a strategic driver in healthcare with more than 18 years of experience in nonprofit fundraising, strategy, communications and engagement.

Megan Crane, MNM, CSPG

Providence Health – *Senior Director of Gift Planning*

Megan works with individuals and families across Oregon to accomplish their philanthropic goals. Megan's development career features robust experience at all points of the donor pipeline, focusing fundraising efforts in higher education and healthcare.

Crystal Logan, MS, CAP®

University of Portland – *Director of Planned Giving*

Crystal has been a fundraising professional for more than 20 years, partnering with local, national, and international nonprofits as a senior gift officer to develop blended gift strategies and drive transformational philanthropic impact through a collaborative approach.



SESSION
CONTEXT
AND
PURPOSE

WHAT WE'LL COVER

Credentialing Process Overview

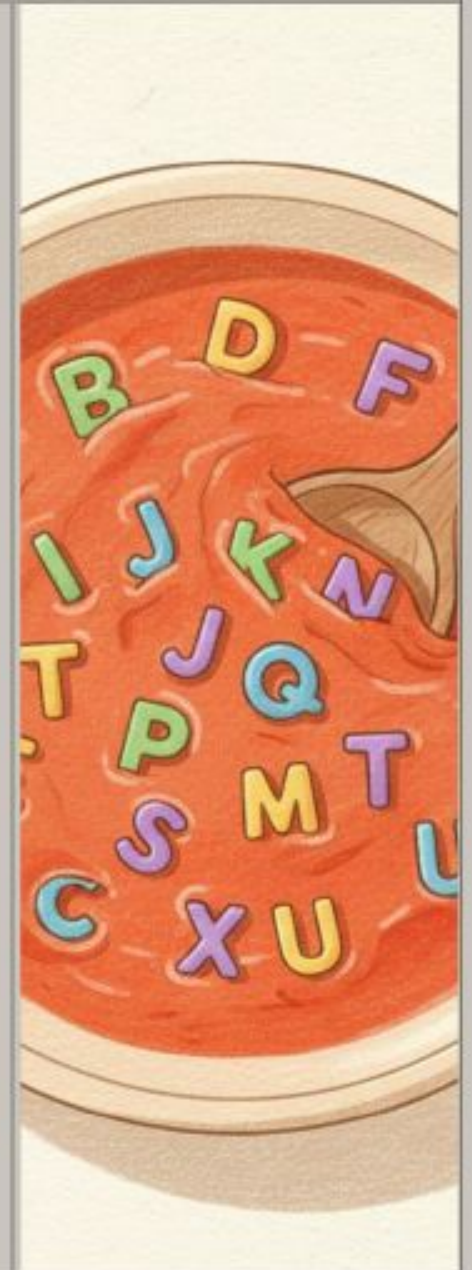
Explain the requirements, time, costs, and exams for CFRE, CAP, and CSPG credentials clearly and practically.

Career Impact of Credentials

Credentials influence promotions, leadership roles, and job transitions, shaping professional identity and opportunities.

Interactive Dialogue and Reflection

Space to ask questions about study workload, balancing work, and leveraging employer support.



CAREER
IMPACT AND
DECISION-
MAKING

IMPACT ON HIRING, CREDIBILITY, AND PROFESSIONAL GROWTH



Influence on Hiring Decisions

Credentials like CFRE are often preferred in senior roles, signaling competence and ethical commitment to employers.

Enhancing Credibility

Credentials increase confidence in donor and stakeholder conversations, supporting sophisticated philanthropic discussions.

Expanding Professional Networks

Credential programs connect participants with peers and mentors, fostering valuable collaborations and referrals.

Supporting Professional Growth

Structured learning and reflection deepen expertise and help professionals articulate accomplishments and build confidence.

INDIVIDUAL
CREDENTIAL
DEEP DIVES

CSPG: CERTIFIED SPECIALIST OF PLANNED GIVING



Program Structure and Content

CSPG through the American Institute for Philanthropic Studies includes 6 live Zoom modules covering financial, tax, estate planning, and donor strategies, each ending with an exam. Each module spans 2 full business days.

Practicum Project

A final practicum project applies program concepts to real-world scenarios, reviewed by faculty as a capstone demonstration.

Cost and Payment Options

Individual modules cost around \$995 each, with a practicum fee of \$350; full program discounts reduce total cost.

Target Audience

Designed for professionals needing specialized gift planning skills.

Ongoing Recertification

10 hours per year of continuing professional education.

CFRE: CERTIFIED FUND RAISING EXECUTIVE



Eligibility Criteria

Candidates must earn education points, demonstrate fundraising work experience, and document professional performance points.

Certification Exam

Candidates pass a multiple-choice exam covering ethics, donor relations, solicitation, management, and stewardship.

Costs and Fees

The initial certification fee is \$875 with discounts for professional organization members; costs vary by education choices.

Ongoing Recertification

Maintaining CFRE requires recertification every three years through continued education, practice, and performance points.

CAP: Chartered Advisor in Philanthropy®

Program Structure and Courses

CAP consists of three graduate-level courses through American College of Financial Services, with final exams for each course at testing site or monitored in-home setting.

Eligibility and Experience

Candidates need three years of relevant business experience and must pass all exams to earn the designation.

Candidates come from backgrounds in law, accounting, financial planning and fundraising.

Costs and Duration

Tuition is about \$2,050 per course or around \$4,000 if you bundle, with most completing in six to twelve months online. Discounts for nonprofit professionals is around \$3,600 for the bundle.

What you Learn

- Tax strategies, tools, and techniques for philanthropic goals
- Understand client or donor goals for self, family members, and/or society
- Advise wealthy families and family offices on important financial matters, including business exit planning, estate planning, and legacy planning
- Handle gift planning for nonprofits and high-capacity donors or philanthropists

Ongoing Ethics and Recertification

Designees must follow a professional code of ethics, enroll in ethics class once every two years and pay annual recertification fee of \$150 a year.





CREDENTIAL LANDSCAPE OVERVIEW

HIGH-LEVEL COMPARISON OF CFRE, CAP, AND CSPG

Credential	Primary Focus	Typical Time Commitment	Testing Requirements
CFRE	Fundraising competency and ethics	3+ years of professional experience	One comprehensive certification exam
CAP	Philanthropic and charitable planning	6–12 months	Exam for each of 3 graduate-level courses
CSPG	Planned giving specialization	12+ months	6 module exams plus final practicum



Designation	Primary Focus	Best Suited For	Key Requirement
AEP® Accredited Estate Planner®	Comprehensive, multi-disciplinary estate planning	Advanced planners (attorneys, CPAs, CAPs, CFPs, CLUs, etc.)	2 grad courses + 5+ years experience
21/64 21/64 Certified Advisor	Family dynamics, values, and legacy facilitation	Advisors working with multigenerational families	2 day in-person/virtual training
IPA Impact Philanthropy Advisor	Technical and strategic charitable giving advice	Wealth/philanthropic advisors	30-hour module training
FCEP Fellow in Charitable Estate Planning	Charitable techniques within tax/estate planning	Advisors specialized in philanthropy	18+ hour class + 3-year renewal
FAHP Fellow of the Association of Healthcare Philanthropy	Healthcare-specific fundraising and leadership	Senior healthcare philanthropy executives	8+ years experience + AHP membership
ACFRE Advanced Certified Fund Raising Executive	Advanced fundraising and leadership	Veteran fundraising executives	10+ years experience + oral exam



Q&A

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