



Approved Provider for
Continuing Education

CFRE International

Certifying fundraising executives
Setting standards in philanthropy

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CONTINUING EDUCATION POINTS TRACKER

CFRE International has developed this form as a way for you to quickly track (and keep in your files!) the continuing education sessions you have attended. Simply check the boxes next to the sessions you attended. At the end of the conference, add up the total number of hours. Keep this sheet and you will be ready to complete your application form. All of the session slots listed are eligible for continuing education points on your CFRE application for initial certification and/or recertification. Sessions not listed here are not eligible for points.

Activity Organizer: - APRA
Title of Activity: - Prospect Development 2016
Names of Presenter(s): - Various
Dates and Location: - July 27th-July 30th | Nashville, Tennessee, United States

Date: Wednesday, July 27th – 28th, 2016

NRS (12.25 pts)

- New Researchers Symposium

DAS (9.75 pts)

- Data Analytics Symposium

Date: Wednesday, July 27th, 2016

Pre-Conference Workshops: 9:00 am – 12:00 pm

(3.0 pts)

- Anatomy of a Profile
- How to Find the Golden Prospect Pool
- Strategically Partnering with HR on Staffing, Structure and Metrics
- A Culture of Outreach: Moving from Reactive Work to Proactive Partnership
- Your First Steps in Data Analytics: Getting from Here to There
- DIY Feasibility Study

Date: Wednesday, July 27th, 2016

Pre-Conference Workshops: 1:30 pm – 4:30 pm

(3.0 pts)

- Let's Talk About Writing! Skills for Effective Prospect Research
- Advanced Web Searching
- The 5-Step Prospect Management System
- Adapting "Big Idea" Best Practices to Small Shops
- Making the Body of Knowledge Work for You: Advocacy and Professional Development
- The Research Recipe for Campaign Success

Date: Thursday, July 28th, 2016

Session 1: 10:30 am – 12:00 pm (1.5 pts)

- 20/20 Strategic Vision for Today's Philanthropic Realities
- Industry Corner II: Firm Funding Lifecycle – Role of Venture Capital and Private Equity
- Swipe Right: The Ethics of Social Media
- prspct.py – Python Programing for Prospect Researchers
- More Than a Data Scrub: Crafting an Ongoing Portfolio Consultation Service
- Partners in Fundraising: Front-line Researcher, Back-line Fundraiser
- So You Think You Want to Be a Director: Creating a Career Ladder in Prospect Development
- DIY Campaign Planning

Date: Thursday, July 28th, 2016

Session 2a: 1:15 pm – 2:45 pm (1.5 pts)

- One [Wo]Man Army: Conquering Prospect Development in a Small Shop
- Setting Them Up for Success: Performance Management to Improve Fundraiser Retention and Optimize Results
- Prospect Development in a Vendor World

Date: Thursday, July 28th, 2016

Session 2b: 1:15 pm – 1:55 pm (0.75 pts)

- Industry Corner: Prime your Pipeline with Prospects: Moving Members to Major Gifts
- The Power of Data Visualization, Prospect Management, and Fundraisers
- Forging Cultural Change: Transforming Your Organization into a Data-Driven, Agile Machine
- Responsive Reporting in a Campaign

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<http://www.cfre.org/education/my-education-finder/>

Date: Thursday, July 28th, 2016

Session 2c: 3:05 pm – 3:45 pm (0.75 pts)

- Industry Corner: Understanding Your Donor: The Intricacies of Doctors
- Does your Documentation Need Documentation?
- Prospect Managers as Part of the Fundraising Team
- Leveraging Campaign Volunteers to Maximize Outcomes

Date: Friday, July 29th, 2016

Session 3: 10:30 am – 12:00 pm (1.5 pts)

- International Fundraising: Cultural Intelligence
- Streamlining Materials with the Audience in Mind
- Predictive Modeling – Or How We Learned to Stop Worrying and Love the Database
- Case Study: Transforming into a Pipeline Management System
- Go Organic! A Sustainable Approach to Change Management
- The Analytics Journey Throughout Your Campaign

Date: Friday, July 29th, 2016

Session 4a: 1:15 pm – 2:45 pm (1.5 pts)

- Impact Giving: Where the Return is Good
- The New Family Foundation: Donor Advised Funds (and What You Should Know)
- Make Sure You See the Forest AND the Trees When Preparing for Campaign

Date: Friday, July 29th, 2016

Session 4b: 1:15 pm – 1:55 pm (0.75 pts)

- Industry Corner: Opportunities in Arts and Culture
- Engagement through Events: Success or Failure
- Gift Officer Turnover and Other Disasters: How to Effectively Manage a Prospect Pipeline during Periods of Disruptive Change
- Leading the Implementation of a New Development Officer Metrics System

Date: Friday, July 29th, 2016

Session 4c: 2:05 pm – 2:45 pm (0.75 pts)

- Industry Corner: Finding Community Builders: Unique Challenges of Community Foundations
- Your Model is Finished, Now What?
- Getting the Band Back Together: Creating Harmony in Prospect Strategy Meetings
- Onboarding for Success: Improving your Fundraiser Trainings
- Wanted: Librarians and Bankers – Recruiting & Hiring for Prospect Development

Date: Friday, July 29th, 2016

Session 5: 3:00 pm – 4:30 pm (1.5 pts)

- Reap Rewards from Genealogy Research!
- Prospect Development Round Robin
- Quantifying Accountability & ROI in Proactive Research Development
- Fully Engaged: Quantifying Engagement for Recognition and Strategy
- Fundraiser Performance Evaluation: Management and Operations Perspectives
- Partners in Fundraising: Getting to the Table: Your Team as Strategic Partners
- Got Interest? Improving the Utilization of Donor Interest Codes

Date: Saturday, July 30th, 2016

Session 6a: 8:30 am – 10:00 am (1.5 pts)

- Data or the Profile, Which Comes First?
- The Wonderful Wizards of Odds & Ends – The Person(s) Behind the Curtain: The Unseen World of the Small Research Shop
- Learning SQL for Beginners
- LINK Your Way to Collaborative Portfolio Evaluations
- Creating Integrated Prospect Development (Regardless of Size or Org)
- More than Just News: How a Newsletter Can Help Your Team Measure Impact, Maximize Partnerships, and Inspire Collaboration

Date: Saturday, July 30th, 2016

Session 6b: 8:30 am – 9:10 am (0.75 pts)

- Industry Corner: Higher Education Dialoging with Users: Building the Best Reports Possible
- Partnering with Annual Giving: A Rich (and often overlooked) Opportunity

Date: Saturday, July 30th, 2016

Session 6c: 9:20 am – 10:00 am (0.75 pts)

- Industry Corner: Consultants Beyond Price: Evaluating Information Products
- Feed the Lead – Giving Organizational Memory a Boost

Date: Saturday, July 30th, 2016

Session 7: 10:15 am – 11:45 am (1.5 pts)

- The Basics of Building a Prospect Research Program for a Small Shop
- A New Gilded Age – Philanthropy and Wealth in the 21st Century
- Turn Gender Research into Fundraising Intelligence
- “Excel”-ing at Data Viz Design
- Contact Reports That Work for You (Not Against You)
- Rocket Ships and Relationships: When Simple Isn’t Always Easy
- Prospect Research is a Cause
- Scaffolding around the Campaign Pyramid

Total Number of Points attained: _____