



## 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:** - [Project Development 2018]  
**Names of Presenter(s):** - [Various]  
**Dates and Location:** - [August 8 - 11, 2018 – Pittsburgh, PA]

**Date: August 8, 2018**

**Session 1: 9:00 [am] – 12:00 [pm] (3 pts)**

- Success by Design: Managing Your Team Through an Ever-Evolving Landscape
- One is the Loneliest Number: A Survival Workshop for Solo & Small Shop Researchers
- Persuading and Negotiating for Success: Portfolio Reviews
- Validating Wealth Screenings: Minimum Effort for Maximum Benefit
- The Three Faces of PD: Research/Management/Analytics - A Dialogue with Results!

**Date: August 8, 2018**

**Session 2: 1:30 [pm] – 4:30[pm] (3 pts)**

- Raise the Bar in Your Career: Strategies & Tools to Achieve the Next Level in Your Career
- Advocate!
- A Public Struggle with Private Companies
- So You're Going into a Campaign: Prospect Management Essentials
- There's no time like the present: Reactive to Proactive Revolution Mid-Campaign

**Date: August 9, 2018**

**Session 1: 10:30 [am/pm] – 12:00 [pm] (1.5 pts)**

- Grateful Patience: Patient Family Programs Take Time, Commitment and Perseverance
- How Far You'll Go - Finding the Best Prospects

for the Right Project

- Prospect Management as a Change Agent: Building Exceptional Donor Partnerships from Within Your Organization
- Analyzing Fundraiser Performance: Top Performers
- Portfolio Optimization - How We Started, Where We Are, and Where We're Going
- Strategy: It's Not Just a Buzz Word
- Our Journey from Reactive to Proactive Prospect Research, Prospect Management, and Analytics
- Using Engagement and Social Insights to Discover and Qualify New Prospects

**Date: August 9, 2018**

**Session 2: 1:15 [pm] – 2:45 [pm] (1.5 pts)**

- Big Data for Small Shops: How All Organizations can Track and Promote Engagement
- Skyscrapers and Ski Lifts: An In-Depth Look at Real Estate in NYC and Resort Town USA
- From Researcher to Investor: Using Your Research Skills on Your Own Stock Portfolio
- XYZ...Wealth To Be?!
- Control, Alt, Delete: Rebooting Portfolio Enthusiasm
- Come Out of the Shadows: Develop Pipeline Status and Projection Reporting Procedures

Courses Marked **NFR** (Non Fundraising Related) may be counted towards the 10 point maximum of NFR Courses on the initial CFRE application and the 5 point maximum on the re-certification application.

- Based on Knowledge, Not Fantasy
- Moving Beyond the Gift Cycle: A New Approach to Prospect Management
- Leading by Example: Building Successful Mentorship Programs, Relationships, and Skills

**Date: August 9, 2018**

**Session 3: 3:45 [pm] – 4:30 [pm] (1 pt)**

- Bentz Whaley Flessner: Transforming Prospect Development
- The iWave Roadmap — New Data and Features Designed to Help All Nonprofits Fundraise With Confidence
- The Next Generation of Analytics
- Best Practices for Prospect Research

**Date: August 9, 2018**

**Session 4 :45[pm] – 5:30 [pm] (1 pt)**

- A Raise of Hands: Combining Screenings & Surveys to Identify Prospects for Specific Initiatives
- Why iWave? — How 3 Development Teams Transformed Their Organizations With the Top Rated Research Tool
- The Next Generation of Analytics

**Date: August, 10, 2018**

**Session 1: 11:00 [am] – 12:30 [pm] (1.5 pts)**

- Preparing your Organization for the Demands of a Campaign
- Collecting, Analyzing, and Utilizing Social Media Data to Drive Actionable Results
- Making Analytics Actionable
- Domestic and International Private Business Valuation
- Building, Scaling and Sustaining a Successful Patient and Family Giving Program
- Ms Informed: Working with Fundraisers to Advance Women's Philanthropy
- How Four Disciplines of Execution Will Propel Prospect Pipeline Management and Meet Your Fundraising Goals
- Precision Prospect Development: How to Get a Seat at the Table and Usher in the Age of Precision Philanthropy

**Date: August 10, 2018**

**Session 2: 1:45 [pm] – 2:45 [pm] (1 pt)**

- Campaign Goal and Staffing Size Decisions: Two

- Sanity Checks Sure to Please
- So You Want Analytics (Now)?
- Finding Diamonds in the Rough: How to Make the Most of One-time Donors
- The Power of One! Prospect Research for the Small Shops
- Jurassic CRM: How To Be A Clever Girl (or Guy) In A Database Conversion
- Prospect Management for Planned Giving Prospects
- You Say Goodbye, I Say Hello: Portfolio Management Strategies for Staff Transitions
- Organize to Optimize Relationships

**Date: August 10, 2018**

**Session 3: 3:00 [pm] – 4:00 [pm] (1 pt)**

- Fear Not the Capital Campaign!
- Measures of Affection: Developing & Applying a Data-Driven Engagement Index
- Overlooked, Underused & Underestimated: LinkedIn for Fundraising Strategy
- Diversity, Capacity, and Engagement: Prospecting for Volunteer Leadership
- Do you Hear What I Hear? Building Partnerships with Gift Officers
- 'Manual: There's No Manual for This': How to Create a Prospect Management Manual that Development Officers Will Actually Use
- Now What? Weaving Facts and Expertise into Meaningful Prospect Strategies
- Managing for Innovation and Retention

**Date: August 10, 2018**

**Session 4: 4:15 [pm] – 5:15 [pm] (1 pt)**

- Everything I Needed to Know About Prospect Management, I Learned From World of Warcraft
- Forecasting & Scoring for Endowments
- "You Shaped My Career": Uncovering a Pipeline of Postgraduate Constituents
- General Data Protection Regulations and The Future of Prospect Research
- Helping Your Development Officers Get That First Appointment
- Do We Need Counseling? When the Relationship between Prospect Management and Prospect Research Drifts Apart
- Building Relationships Outside of Development
- A FIRM FOUNDATION: Developing a Strategic

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## Plan for Your Career

### **Date: August 11, 2018**

#### **Session 1: 8:00 [am] – 9:30 [am] (1.5 pts)**

- Rethinking Gift Tables
- Stuck in the Middle with Who: Analytics and Strategies for Mid-Level Giving
- Substance With Style: Dressing Up Traditional Reports in Excel
- Don't Get Lost! An International Research Map
- Proactive Prospecting: Finding Your Organization's Soup Snakes
- New Lead Strategy Tracking: Preventing Pileup and Promoting Progress
- Herding Cats: The Art of Prospect Management

### **Date: August 11, 2018**

#### **Session 2: 9:45 [am] – 10:45 [am] (1 pt)**

- Research to the Rescue! Using Plug and Play Projection Models to Inform Fundraising Decisions
- The Perfect Scenario - Using Excel to Make Data-Driven Decisions on the Fly
- Social Media: Occupation to Family Info
- The Role of Psychology in Prospect Research and Strategy
- International Prospect Research Roundtable
- Crowdsourcing, Donor Advised Funds, and Apps, Oh My!"
- Development Officer Metrics: Creating a Research & Prospect Management Driven

## Scorecard

- Building Effective Partnerships with IT: Do you speak IT?

### **Date: August 11, 2018**

#### **Session 1: 11:00 [am] – 12:00 [pm] (1 pt)**

- Collateral Advantage: Setting an Organization's Annual Fundraising Goal
- Creating a Daily Newsletter for Your Fundraising Team
- Overcoming News Overload
- Exhilarating Email
- International Grants from US foundations: Yes You Can!
- Riding into the Sunset: Implementing a System to Roll Prospects Out of Development Officer Portfolios
- From Spreadsheets to the Cloud: Elevating Grateful Patient Fundraising
- Once a Researcher Always a Researcher? - How to Advance Your Career

**Total number of points attained:** \_\_\_\_\_

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