



Approved Provider for Continuing Education

CFRE International

Certifying fundraising executives
Setting standards in philanthropy

+1 703 820 5555
www.cfre.org
succeed@cfre.org

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 2015
Names of Presenter(s): - Various
Dates and Location: - July 22nd - July 25th | New Orleans, Louisiana, United States

Dates: Wednesday, July 30th - 31st, 2015

NRS (15 pts)

- New Researchers Symposium

DAS (14.5 pts)

- Data Analytics Symposium

Date: Wednesday, July 22, 2015

Pre-Conference Workshops: 9:00 am – 12:00 pm (3.0 pts)

- Custom Fit: Tailor Your Ratings
- Evaluating Program, Gift Officer and Portfolio Performance
- Prospect Strategies: A to Z
- Communication as a Tool for Change
- More Show and Less Tell
- Smaller Shops Redesign Prospect Management

Date: Wednesday, July 22, 2015

Pre-Conference Workshops: 1:30 pm – 4:30 pm (3.0 pts)

- Leveraging Your Resources: from Profiles to Partnerships
- It's All About Location
- Achieving Intelligence: Building an Integrated Prospect Development Program
- Advancing, Leading, and Advocating with the Body of Knowledge
- Strength in Numbers: Data Analytics as a Prospecting Tool
- Campaigns After the Downturn

Date: Thursday, July 23, 2015

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

- Parent Research and Fundraising in Higher Ed
- Creating a Prospecting Resource for Gift Officers
- Relationship Management Reporting: Creating a Data-Driven Forecast
- Amplify Prospect Management Amidst Complexity
- Prospect Development through Consulting
- So You Want to be a Consultant? How to Make the Transition from Advancement to Consulting, and How to Use the Consultant's Toolset to Make Your Life Easier in Your Current Role
- The Heart and Soul of Campaigns

Date: Thursday, July 23, 2015

Session 2: 1:15 pm – 2:00 pm (0.75 pts)

- Creating Presidential Briefings, Process and Best Practice
- Deciphering Art Wealth
- Where There's a Cause, There's a Prospect Pool: A Framework for Thinking about Prospects and Roadmap for Developing a Prospect Pool
- All the Right Prospects: Dynamic Portfolio Reviews
- Beyond What They Ate For Lunch: Making the Most of Contact Reports
- Guarding the High-Capacity Galaxy: Prospect Research & Management as Protectors of Institutional Capacity
- So You Wanted to be a Supervisor—Now What?
- Reveal of the Campaigns Body of Knowledge Domain

Date: Thursday, July 23, 2015

Session 3: 2:00 pm – 2:45 pm (0.75 pts)

- Creating Presidential Briefings, Process and Best Practice
- Deciphering Art Wealth
- Where There's a Cause, There's a Prospect Pool: A Framework for Thinking about Prospects and Roadmap for Developing a Prospect Pool
- All the Right Prospects: Dynamic Portfolio Reviews
- Beyond What They Ate For Lunch: Making the Most of Contact Reports
- Guarding the High-Capacity Galaxy: Prospect Research & Management as Protectors of Institutional Capacity
- So You Wanted to be a Supervisor—Now What?
- Body Of Knowledge Round table Networking and Discussion

Date: Friday, July 24, 2015

Session 4: 10:30 am – 12:00 pm (1.5 pts)

- New Researchers; The Next Generation
- Frugal Research -- Rich Results
- Taking Care of Business: Rating and Researching Corporations and Foundations in Canada and the US
- Beginning the Data Mining Process
- Corporate and Foundation Relations: Creating Impact
- The Donor Pipeline: It Starts with the Invitation List: Turning Guests into Donors
- "Oh the Places You'll Go!" Practical Advice on the Development Career Journey
- Wish I Knew Then, What I Know Now: Managing a Capital Campaign Full of Firsts
- APRA Talks: Keep the Conversation Going!

Date: Friday, July 24, 2015

Session 5: 1:15 pm – 2:00 pm (0.75 pts)

- Integrating Corporate and Foundation Relationships into Prospect Management and Research
- Love at First Insight
- Opening Doors in International Research
- Competing in an Analytical Environment
- We're So Glad We Did That: 7 Things We Love in Prospect Management
- Prospecting in Partnership with Fundraisers
- Utilizing Technology and Analytics to Drive Prospect Strategy
- Using Data Analytics to Uncover and Identify Prospect Interests
- Salary Survey Open Forum

Date: Friday, July 24, 2015

Session 6: 2:00 pm – 2:45 pm (0.75 pts)

- Integrating Corporate and Foundation Relationships into Prospect Management and Research
- Love at First Insight
- Opening Doors in International Research
- Competing in an Analytical Environment
- Building an Integrated, Effective and Efficient Prospect Identification and Management System
- Art + Science = Prospect Development
- Utilizing Technology and Analytics to Drive Prospect Strategy
- Using Data Analytics to Uncover and Identify Prospect Interests
- Salary Survey Open Forum

Date: Friday, July 24, 2015

Session 7: 3:00 pm – 4:30 pm (1.5 pts)

- Preliminary Ratings: Getting Development on their Way
- Research Stages: Hold the Profile
- Researching Public Filings with Success
- Super-Size My Screening!
- Prospect Management: How to Get Started?
- Captain, We Have a Problem
- Dynamic Prospecting Events: How Prospect Research Can Lead and Super Charge Major Gifts Prospecting!

Date: Saturday, July 25, 2015

Session 8: 8:30 am – 9:15 am (0.75 pts)

- Exploring Philanthropy Coast to Coast
- True Detective: "Apprehending" Prospects Proactively
- Trends in Researching Wealthy Women
- Tracking Prospect Identification
- Modernizing the Contact Report or Describing an Elephant in 50 Words or Less
- Say What? Communicating for Results
- Developing and Using Power and Influence Within Your Organization
- Focusing on the Top Prospects in the Chaos of a Campaign

Date: Saturday, July 25, 2015

Session 9: 9:15 am – 10:00 am (0.75 pts)

- Exploring Philanthropy Coast to Coast
- True Detective: "Apprehending" Prospects Proactively
- Trends in Researching Wealthy Women
- Tracking Prospect Identification
- Discussion: Modernizing the Contact Report or Describing an Elephant in 50 Words or Less
- Say What? Communicating for Results
- Developing and Using Power and Influence within Your Organization
- Focusing on the Top Prospects in the Chaos of a Campaign

Date: Saturday, July 25, 2015

Session 10: 10:15 am – 11:45 am (0.75 pts)

- Making the Past Prologue
- Industry Corner: Identifying and Cultivating Prospects from the Law, Pharmaceutical, and Startup Industries
- Engagement Metrics for International Prospects
- Residential Real Estate Review
- Advanced Portfolio and Moves Management
- Equal Partners: Together at the Strategy Roundtable
- The Strategic Researcher
- Utilizing Boards with Peer Screenings

Total number of points attained: _____