



## 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 2019  
**Names of Presenter(s):** - Various  
**Dates and Location:** - July 31 - Aug 3, 2019, Phoenix, AZ

**Date: Wednesday, July 31, 2019**

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

- The Numbers Matter: DO Metrics & KPIs in a Campaign
- Building a Grateful Patient Program
- Diversity and Inclusion in Prospect Development
- Program Evaluation: assessing more than just a prospect's capacity

**Date: Wednesday, July 31, 2019**

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

- The Other Faces of Prospect Development - Part 2: Continuing The Discussion
- A Stepwise Approach to Strategic Planning
- If I Knew Then What I Know Now: Lessons for New and Aspiring Leaders
- Data Rules - Prospect Development in the Age of Privacy

**Date: Thursday, August 1, 2019**

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

- Think Like a Philanthropist
- Using Recommender Systems to Identify Prospect Interests
- Biting Off as Much as You Can Chew: Managing the Wealth Screening Data Smorgasbord
- International (Wo)Men of Mystery: An Analyst's Guide to Vetting International Prospects

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.

- Partnerships in Pipeline Development
- Ask A Gift Officer - Everything You Ever Wanted to Know, but Were Afraid to Ask
- All A-Board! Successful Board and Senior Executive Peer Reviews, Expectations, and Communication
- Ask the Ethicist - LIVE!

**Date: Thursday, August 1, 2019**

**Session 2: 2:15 [pm] - 3:45 [pm] (1.5 pts)**

- Using Data Science to Improve Fundraiser Metrics and Optimize Portfolios
- The Million Donor Question: How the ACLU Identified Its Best Prospects During Times of Change
- How to Build Awareness Around Marginalized Identities: A Panel Discussion
- Beyond Capacity: Wrangling Ratings for Fundraising Success
- Empower Yourself to Improve Gift Officer Relationships
- Managing for Innovation and Retention

**Date: Thursday, August 1, 2019**

**Session 3: 4:15 [pm] - 5:15 [pm] (1 pt)**

- From the Heights of the Pyramids: Demystifying Campaign Pyramids One Stone At A Time
- Revitalizing Prospect Management

- You Aren't Alone: Training Support Staff & Student Workers to Research
- Prospect Management without Micro-Management: Strategies for Small Teams
- Setting up a Campaign Prospect Pipeline - All this Data! Where do we go from here?
- Everything I Needed to Know about Talent Management I Learned from World of Warcraft
- The Mindful Researcher

**Date: Friday, August 2, 2019**

**Session 1: 10:30 [am] - 11:30 [am] (1 pt)**

- Finding Challenges and Opportunities in a Nontraditional Campaign
- Report Branding | Using Style with Substance to Generate Trust
- This or That: Saying No to Low-Impact Projects to Pave the Way for More Strategy
- The Easy Button for Event Prep: Implementing a Proactive Event Briefing Process
- Partnering with Gift Officers: Forecasting, Moves Management and Establishing a Policy
- Portfolio Power & Relationship Management
- Strategic Discussion – Stepping Away from Cleanup and Focusing on Meaningful Conversations
- Key Metrics in Major Giving Fundraising

**Date: Friday, August 2, 2019**

**Session 2: 1:30 [pm] - 2:30 [pm] (1 pt)**

- \$6 Billion Plan - Campaign Success - Prospect Research, Data Analytics, Relationship Management
- Filling a Knowledge Gap: Investment Insights to Benefit Prospect Researchers and Fundraisers
- Geographic Prospecting using Excel Maps
- Renew and Improve: Creating Research Products for Changing Organizations
- The Many-Faced God Has Many Names: Creating Prospect Personas for an Analytic Affinity Model
- Demonstrating Success: Prospect Development Metrics at UC Berkeley
- Virtual and Traditional Office Environments: Are They Created Equal?

**Date: Friday, August 2, 2019**

**Session 3: 2:45 [pm] - 3:45 [pm] (1 pt)**

- Data Strategies for a Successful Campaign
- What is the Right Funding Level Required to Optimize Your Next Campaign?

- Measuring Success: A Crash Course in Fundraising Dashboards Using Microsoft Power BI
- Metrics Are Not Just for Fundraisers
- Special Butterflies: The Metamorphosis of Unique Portfolios
- Herding Cats: Working Productively with Fundraisers
- I'll Be There For You: How to Build and Utilize Relationships to Get Buy-in for Research Projects
- Clue, Monopoly, Risk – Prospect Development as an International Game and How to Play It

**Date: Friday, August 2, 2019**

**Session 4: 4:00 [pm] - 5:30 [pm] (1.5 pts)**

- Putting Together Pieces and Parts: Customize a Campaign for Your Cause-Related Organization
- Data Driven Strategies for Annual Giving: How Prospect Development Can Partner with Our Annual Giving Colleagues
- Creating Unit-Specific Planned Gift Likelihood Ratings
- Flying Cowboys and Performing Hawkeyes: Discovering New Prospects Using an Interest-Based, Social Media-Driven Approach
- International Research in Asia or: How I Learned to Stop Worrying and Love Thinking Outside-the-Box
- Reporting & Visualization Techniques for Relationship Management
- Unleashing Creativity through Connection
- Leadership is Hard ... and that's ok

**Date: Saturday, August 3, 2019**

**Session 1: 8:00 [am] - 9:00 [am] (1 pt)**

- Tending the Crops: Growing a Data-Driven Program for Your Fundraising Pipeline
- Building a Pipeline Through Collaborative Fundraising
- Successful Trips for Your Fundraisers
- 30 Resources in 60 Minutes
- What does "big data" mean for fundraising analytics?
- Keep It Crisp: Starting Analytics Success Through Constant Focus on the Why
- Good to Great: Building a Culture of Transparency, Accountability, and Collaboration from the Ground Up

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.

Find more **CFRE approved** continuing education opportunities on **My Education Finder**:  
<http://www.cfre.org/continuing-education/my-education-finder/>

**Date: Saturday, August 3, 2019**

**Session 2: 9:15[am] - 10:15 [am] (1 pt)**

- Healthcare/Grateful Patient Pipeline that DO's are Excited About
- How to Win Friends and Influence Fundraisers: 5 Key Strategies for Successful Prospect Managers
- A Little Bit of Everything: Being a Solo Researcher and Loving It!
- Reimagining Possibilities, Designing Solutions and Finding New Hope in a CRM: A Salesforce Story
- Effective Time Management: The Key to Proactive Research
- Think Like a Fundraiser – Use Ratings and Prioritization Tools to Get Movement on New Prospects
- Analytics Beyond Excel

**Date: Saturday, August 3, 2019**

**Session 3: 10:30 [am] - 11:30 [am] (1 pt)**

- Let Me Tell You 'Bout My Best Friend: A Tactical Approach to Building Relationships with Development Officers
- Measuring the Measurers | Developing Performance Metrics for Data Analysts
- Bringing New Life to Prospect Development Meetings
- Grateful Scholars: Do High-Achieving Alumni Give Back?
- Children of Notable Parents: Targeted Segmentation to Identify Families of Wealth
- DIY: Alumni Engagement Score
- Essentials for Campaign-Focused Executive Portfolio Reviews

**Total number of points attained:**

---

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.

Find more **CFRE approved** continuing education opportunities on **My Education Finder**:  
<http://www.cfre.org/continuing-education/my-education-finder/>