



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: - Apra Prospect Development 2024
Names of Presenter(s): - Various
Dates and Location: - 20-23 August, 2024 – Seattle, WA USA

Date: 20 August, 2024

Session 1: 1:00pm – 4:00pm (3 pts)

- Unleashing the Power of AI: Revolutionizing Prospect Development with BoodleAI's Predictive Guidons
- Cultivating Gratitude: Building a Grate ful Patient Program from the Ground Up
- Grandmother, Mother, Daughter: Mining Your Database for Meaningful Intergenerational Impact
- Report Redesign: Leveraging Transparency, Authenticity, and Empathy as a Change Management Tools

Date: 21 August, 2024

Session 2: 8:45am – 10:00am (1.25 pts)

- Keynote Presentation: Humanity in Fundraising: Revolutionizing Donor Engagement

Date: 21 August, 2024

Session 3: 10:30am – 11:30am (1 pt)

- Navigating Inclusive Philanthropy: Addressing Historical and System Biases in Prospect Development and Data Tracking and Reporting
- Unlocking Hidden Potential: How Indiana University Health Foundation's Mid-Level Giving Program Generated Over \$93,000 in Six Months
- Evaluating and Implementing AI for Prospecting Identification
- Protecting Our Institutions: Due Diligence and Risk Management Trends and Insights
- In My Teaching Era: Training and Learning in a Small Shop
- Revolutionizing Data Analytics and Prospect Management: Unveiling the Power of an Organization-Wide Decision Tree

Date: 21 August, 2024

Session 4: 1:45pm – 2:30pm (1 pt)

- How Is Fundraising Technology Changing, and How Will it Help us Connect With Our Donors?

Date: 21 August, 2024

Session 5: 2:45pm – 3:45pm (3 pts)

- It's Not Just the Numbers! – Income, Psychology, and Giving Behavior
- Partners in Fundraising: Facilitating an Effective and Collaborative Portfolio Review Meeting
- Actionable Affinity Ratings: Incorporating Donor Engagement to Prioritize Your Prospects
- It Takes a Village: Expanding the Donor Pipeline Through Strategic Partnerships
- From Service Provider to Strategic Partner: The Trusted Advisor Journey
- The Dark Arts of Revenue and Fundraising Forecasting

Date: 21 August, 2024

Session 6: 4:15pm – 5:15pm (1 pt)

- AI and PD – How All Aras Can Ensure Ethical Practices for AI
- Portfolio Health: Your Portfolio Fitness Tracker
- Beyond Documentation – Mastering Contact Reports: Guidelines for Crafting Comprehensive Contact Reports for Strategic Advancement

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.

- Microdata: Your Key to the Prospects Hidden in Plain Sight
- What Moves YOU? Utilizing Your Own Personal Move Management to Enhance Your Career an Professional Next Steps

Date: 22 August, 2024

Session 7: 9:00am – 10:30am (1.5 pts)

- We're All Data Scientists

Date: 22 August, 2024

Session 8: 10:45am – 11:45am (1 pt)

- Identifying the Next Generation of Principal Gift Prospects
- How to Turn Your Database Into an Asset
- Using Tableau to Create Heat Maps by County
- Prospect Management as the Keystone for Radical Change in Portfolio Management and Fundraiser Performance Management
- Using Analytics to Drive Dynamic Major and Principal Giving Pipeline Development
- Pathfinding Leadership: An Informed Tactic to Development Stewardship

Date: 22 August, 2024

Session 9: 1:30pm – 2:45pm (1.25 pts)

- The ABCs and 123s of DAFs
- You CAN Have It All: Building a Proactive Lead Program That Works for Everyone
- Advice from the field; Prospect Development Best Practices for Small Shops
- A KPI Journey – Creating Metrics and Changing Culture with Institutional Fundraisers
- Building a Career Pathway Program: A Roadmap to Growing Opportunities for Our Teams
- Beyond VLookup: How You – Yes, You – Can Use Basic Coding to Increase Efficiency and Close Gaps in Your Prospect Development Reporting

Date: 22 August, 2024

Session 10: 3:00pm – 4:15pm (1.25 pts)

- Sailing Through Stock Research
- Building a Prospect Management System as a Team of One
- The Strong, Silent Type – Introverted Leadership
- What to Expect When You're Expecting (a Salesforce CRM!)

- Revolutionize Your Database: Fix Messy Data and Build a Strong Foundation
- PRIMED for Success! Data and Information for Impact and Influence

Date: 23 August, 2024

Session 11: 8:30am – 9:30am (1 pt)

- Moving from the Cubicle to the Kitchen Table: Pivoting to Remote Work
- The Wheels on the Bus; Using Data & Process to Drive a Public-Phase Campaign Prospect Pipeline
- LOVE in Practice: Identification Beyond Financial Means
- Unlocking Fundraising Success: Powering Discovery and Referrals with Goal Motivation
- Finding Your (Donor's) Roots: Practical Applications for Genealogy in Development
- Donor Advised Funds

Date: 23 August, 2024

Session 12: 9:45am – 10:45am (1 pt)

- Designing Your Own Crystal ball: From Revenue Forecasting to a Long-Term Growth Model
- Small and Mighty – Leveraging the Unique Strengths and Challenges of Smaller Shops
- Managing Portfolios and Pipelines Through Staffing Changes
- What's Your Red Flag? Reputational Risk and Philanthropic Due Diligence Best Practices
- Lighting Your Own Way – Using Vision to Find Professional Growth Opportunities in Challenging Times
- Hand Over the Heavy Lifting: Use AI in Your Prospecting

Date: 23 August, 2024

Session 13: 11:00am – 12:00pm (1 pt)

- Oh the Places You'll Go
- In My Wellness Era
- Shifting Tides from Reactive to Proactive
- The (Hidden) Wealth of Nations
- Optimizing Fundraising Success
- Parent Pipeline Under Pressure

Total number of points attained: _____