

Course Format

The AFP CFRE Review Course consists of an introductory module and nine content modules. Each contains content, questions for discussion, activities and other ideas.

Brief Description of Each Module:

I. **Why Philanthropy?** Gives an overview of philanthropy and fundraising through brief exploration of how and why people give. Sets the stage for how the principles of research, marketing, building relationships and ethics apply.

II. **Current and Prospective Donor Research** Explores the strategies and tools needed to create, analyze, use and maintain a prospect list. Examines methods for qualifying and rating prospects, and conducting research to enable planning and evaluation of specific aspects of a fundraising program.

III. **Marketing & Communications for Fundraising and Development** Looks at marketing and communications tools, techniques, and strategies for promoting organizations and their work to stakeholders.

IV. **Developing a Comprehensive Solicitation Program** Beginning with developing the case, this module covers the steps involved in planning and implementing a solicitation program encompassing a variety of fundraising programs, from annual through major and planned gifts.

V. **Building & Sustaining Relationships** Once plans for and structure of the fundraising program are in place, attention is paid to establishing, building and maintaining the relationships that are the core of effective fundraising. This covers the concepts of cultivation and stewardship as well as of the balancing act that nonprofit organizations must undertake. Both individual and organizational relationships are discussed.

VI. **Securing the Gift** Focuses on the tools, techniques, and elements used in asking for and recognizing annual and major gifts from donors, including preparing volunteers with the content they need to successfully solicit contributions to the organization.

VII. **Volunteer Involvement** Shares methods and strategies for engaging volunteers. It covers recruitment and retention, orientation and training, engagement in fundraising planning and implementation, and delineates the roles of volunteers and staff.

VIII. **Management** Covers fundraising from the perspective of the development officer and/or CEO, touching on the various elements of strategic and operational planning, managing the fundraising process, staff management and development, and contracting outside services.

IX: **Accountability** Provides participants with an overview of the legal, regulatory and ethical considerations with which fundraisers must comply in order to ensure accountability and transparency for its stakeholders.

AFP Members



Connecticut's AFP Chapters
Connecticut and Fairfield County
present the
CFRE
Review Course
University of New Haven
June 26 and June 27, 2014

The designation CFRE—Certified Fund Raising Executive—is a mark of distinction providing heightened professional recognition and greater career options and earning potential for fundraising executives.

AFP Connecticut Chapter Website:
www.afpct.afpnet.org

AFP Fairfield County Website
www.afpfairfield.org

Association of Fundraising Professionals
4300 Wilson Boulevard, Suite 300
Arlington, VA 22203
703-684-0410
FAX: 703-684-0540
www.afpnet.org

The CFRE Review Course

The CFRE Review Course is a two-day, intensive program that offers development professionals an opportunity to review the main components of a complete fundraising program. It focuses on the terminology, organization and structure of a development operation and is presented through lecture, transparencies, handouts, case studies and the encouragement of participant dialogue.

A manual is distributed to each registrant.

Day 1

- 8:30 - 8:50am **Introduction**
8:50 - 9:15am **Why Philanthropy?**
9:15 - 10:15am **Current and Prospective Donor Research**
10:15 - 10:30am **Break**
10:30 - 11:15am **Research, continued**
11:15 - 12:15pm **Marketing and Communications**
12:15 - 1:15pm **Lunch**
1:15 - 1:45pm **Marketing and Communications**
1:45 - 3:15pm **Developing a Comprehensive Solicitation Program**
3:15 - 3:30pm **Break**
3:30 - 4:30pm **Comprehensive Program, cont.**
4:30 - 5:15pm **Securing the Gift**
5:15 - 5:30pm **Break**
5:30 - 6:15pm **Securing the Gift, continued**

Day 2

- 8:15 - 10:15am **Building and Sustaining Relationships**
10:15 - 10:30am **Break**
10:30 - Noon **Volunteer Involvement**
12:00 - 1:00pm **Lunch**
1:00 - 2:30pm **Management**
2:30 - 2:45pm **Break**
2:45 - 3:45pm **Accountability**

Overall Course Learning Objectives

Objectives for the CFRE modules match CFRE International's objectives for the exam. However, to completely achieve these, exam candidates should study the exam material on their own and supplement this course with a thorough study of the Reading List at www.cfre.org

Course Location and Cost

University of New Haven
300 Boston Post Road
West Haven, CT 06516

\$390 for AFP members / \$490 for non-members

Curriculum manual, two continental breakfasts and two lunches included.

The Certification Program

The Certified Fund Raising Executive (CFRE) Professional Certification Program is governed and administered by CFRE Professional Certification Board, an independent international organization working with thirteen participating organizations.

The program offers fundraising professionals with five years or more experience an opportunity to earn recognition for their experience and professionalism. Candidates must complete a separate application for certification and submit all fees 60 days prior to the exam. Questions? Visit their website at: <http://CFRE.org>.

The Review Course is not designed to be a preparatory course for the examination but a review of the body of knowledge which many use to study for the exam.

2014 CFRE Examination Schedule

Interested in taking the certification exam?

August 16 - September 20, 2014
Applications must be postmarked by **June 30, 2014**.

October 18 - December 6, 2014
Applications must be postmarked by **September 30, 2014**.

Download information from the CFRE International website at <http://cfre.org>. Or contact CFRE to request a packet. Phone: 703-820-5555. Email: info@cfre.org
Log on today. Start your application. Save it and add to it as you achieve milestones in your professional life.



For more information on AFP's educational programs contact:

Professional Advancement Div.
AFP International
4300 Wilson Blvd., Suite 300
Arlington, VA 22203

PH: 800-666-FUND (3863)
FAX: 703-684-0540

Scholarship Opportunities

AFP Connecticut Chapter is offering three \$200 Scholarships to members to help defray course costs. Download the application at: <http://afpct.afpnet.org>. **Deadline May 2, 2014** Q's? Contact Adria Giordano at: AdriaandDavid@yahoo.com

AFP Fairfield County is also offering two \$200 scholarships to their members. Contact Donna Schmidt at: DSchmidt@operationhopect.org or 203-292-5588. **Deadline May 2, 2014**

Payment must be paid in full prior to start of course. Funds will be processed and scholarship payment made to recipients at a later date.

Registration Form for CFRE Review Course

Register securely online at: <https://www.chi-cash-advance.com/sforms/appeal769/Contribute.aspx>

Location: _____

Date: _____

Name: _____

Member: Yes _____ No _____

Membership ID#: _____

Title: _____

Organization: _____

Address: _____

Phone: _____ Mobile: _____

Fax: _____

Email: _____

If paying by check, payment must accompany this registration form. **Make checks payable to:**
AFP Connecticut Chapter

Check Enclosed

Mail completed registration to:

Trenton Wright, CFRE
Coordinator of Institutional Advancement
Middlesex Community College
100 Training Hill Road
Middletown, CT 06457-4889

PH: 860-343-5708
FAX: 860-344-2789
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