

## 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 aspects, 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 organization 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



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Connecticut's AFP Chapters  
Connecticut and Fairfield County  
present the

## CFRE Review Course

University of New Haven  
June 23 and 24, 2016

*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](http://www.afpct.afpnet.org)

**AFP Fairfield County Website:**  
[www.afpfairfield.org](http://www.afpfairfield.org)

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Association of Fundraising Professionals  
4300 Wilson Boulevard, Suite 300  
Arlington, VA 22203  
703.684.0410  
FAX: 703.684.0540  
[www.afpnet.org](http://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	<b>Introduction</b>
8:50-9:15am	<b>Why Philanthropy?</b>
9:15-10:15am	<b>Current &amp; Prospective Donor Research</b>
10:15-10:30am	BREAK
10:30-11:15am	<b>Research, cont.</b>
11:15-12:15pm	<b>Marketing &amp; Communications</b>
12:15-1:15pm	LUNCH
1:15-1:45pm	<b>Marketing &amp; Communications, cont.</b>
1:45-3:15pm	<b>Developing a Comprehensive Solicitation Program</b>
3:15-3:30pm	BREAK
3:30-4:30pm	<b>Comprehensive Program, cont.</b>
4:30-5:15pm	<b>Securing the Gift</b>
5:15-5:30pm	BREAK
5:30-6:15pm	<b>Securing the Gift, cont.</b>

### Day 2

8:15-10:15am	<b>Building &amp; Sustaining Relationships</b>
10:15-10:30am	BREAK
10:30-12:00pm	<b>Volunteer Involvement</b>
12:00-1:00pm	LUNCH
1:00-2:30pm	<b>Management</b>
2:30-2:45pm	BREAK
2:45-3:45pm	<b>Accountability</b>

## 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](http://www.cfre.org).

## Course Location and Cost

**University of New Haven**  
**300 Boston Post Road - Bergami Hall Classroom**  
**West Haven, CT 06516**

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

Curriculum manual, two continental breakfasts and two lunches included.

## The Certificate 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 and 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: [www.cfre.org](http://www.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.

## Interested in taking the certification exam?

### 2016 CFRE Examination Schedule

**\*August 1 - September 30, 2016**

**Applications must be postmarked by July 31, 2016.**

**\*October 1 - November 30, 2016**

**Applications must be postmarked by September 30, 2016**

Download information from the CFRE International website at: [www.cfre.org](http://www.cfre.org). Or, contact CFRE to request a packet.

Phone: 703.820.5555 - Email: [info@cfre.org](mailto: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 Division  
**AFP International**  
4300 Wilson Blvd., Suite 300  
Arlington, VA 22203  
PH: 800.666.FUND (3863) x494  
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:** [www.afpct.afpnet.org](http://www.afpct.afpnet.org).

**Deadline: June 1, 2016**

Questions? Contact **Adria Giordano** at: [agiordano@connecticutchildrens.org](mailto:agiordano@connecticutchildrens.org)

**AFP Fairfield County** is also offering one \$100.00 Scholarship to their members. Contact Lisa Ferraro at: [l.ferraro@eaglehill.org](mailto:l.ferraro@eaglehill.org) or call 203.451.2913.

**Deadline is: June 1, 2016.**

**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: <http://www.cvent.com/d/bfqdwl>

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 PH: 860.343.5708  
100 Training Hill Road FAX: 860.344.2789  
Middletown, CT 06457 Email: [twright@mxc.edu](mailto:twright@mxc.edu)