



**Schedule of Study Sessions
for CFRE Examination
Fourth and Final Testing Cycle for 2019
INDIANAPOLIS
FALL 2019**

CFRE APPLICATION SUBMITTED ONLINE TO CFRE INTERNATIONAL (WWW.CFRE.ORG)
FOR TESTING CYCLE OF OCTOBER 2 – NOVEMBER 30, 2019.

APPLICATION DUE OCTOBER 1, 2019

Tuesday, October 15

Study Session I

3:00 p.m. - 5:00 p.m.

Program: Modules I and II – Module I: Why Philanthropy? (Culture of Philanthropy, Psychology of Philanthropy and an Overview of General Fundraising Concepts). Module II: Current and Prospective Donor Research (Laying the Foundation and Shaping the Environment for Philanthropy, Prospecting for Donors, Keeping Track of Donors and Prospects – Data Management Systems, Rating Prospects to Prioritize and Plan Solicitations).

Location: IU Foundation, Showalter House, 1500 N. State Road 46 Bypass

Guest Speaker: TBD

Location: TBD

Tuesday, October 22

Study Session II

3:00 p.m. - 5:00 p.m.

Program: Modules III and IV – Module III: Marketing and Communications for Fundraising and Development (Marketing: Creating, Enhancing and Nurturing Relationships, Communications: A subset of Marketing, Marketing for Specific Purposes, Marketing Online). Module IV: Developing a Comprehensive Solicitation Program (Matrix of Case Categories and Examples, Developing the Case Statement, Development – An Ongoing and Integrated Process, Implementing the Development Program, Comparisons of Three Primary Campaign, Major Gifts and Capital Campaigns, Planned Giving).

Guest Speaker: TBD

Location: TBD

Quiz Review: Modules I & II

Tuesday, October 28

Study Session III

3:00 p.m. - 5:00 p.m.

Program: Modules V and VI – Module V: Building and Sustaining Relationships (The Critical Balance: Organization Needs vs. Community Needs, Cultivation, Constituency Development, Relationships with Individuals and Organizations, Seven Types of Organizations – Typical

Motivations and Strategies, Grant Support Also Requires Relationships, Organizing Relationships to Retain Donors). Module VI: Securing the Gift (Setting Up an Acknowledgement and Recognition System, Asking for Gifts: The Roles of Volunteers and Staff, Securing Annual Gifts, Securing Major Gifts)

Guest Speaker: TBD

Location: TBD

Quiz Review: Modules III & IV

Tuesday, November 5 or Thursday, November 7

Study Session IV

3:00 p.m. - 5:00 p.m.

Program: Modules VII and VIII – Module VII: Volunteer Involvement (Differentiating Staff and Volunteer Roles, Identifying and Recruiting Volunteers, Orienting and Training Volunteers for Success, Engaging Volunteers in the Organization's Work, Evaluation and Feedback for Volunteers, Recognizing and Rewarding the Work of Volunteers). VIII: Management (Strategic Planning in Organizations, How development Fits Into Organizational Planning, Budget Planning, Analyzing and Evaluating Development Plan Performance, The Governing Board's Role, Staff Management, Working with Consultants and Other Vendors).

Guest Speaker: TBD

Location: TBD

Midterm Review

Tuesday, November 12

Study Session V

3:00 p.m. - 5:00 p.m.

Program: Module IX – Accountability (What Stakeholders Want to Know, Standards for Ethics and Accountability in the Profession, Donor Bill of Rights, Ethics in Practice, Maintaining Donor Records, The Board's Role in Accountability, The Legal and Regulatory Environment for Development)

Guest Speaker: TBD

Location: TBD

Quiz Review: Module V and VI

Monday, November 18

Study Session VI

3:00 p.m. - 5:00 p.m.

Program: Practice Review Exam for CFRE Examination

Location: TBD

Final Examination Review

Tuesday, November 19 – Saturday, November 30

CFRE Examination Testing Period