**CFRE Exam Prep Course Proposal for AFP Greater Phoenix Chapter**

**Course Title:** CFRE Prep Course | Virtual Lunch & Learn Edition

**Course Instructor:** Lisa Fontes, PhD, CFRE

**Instructor Bio:** Lisa Fontes began fundraising as an archaeology student without realizing it would become her career. She has helped several organizations grow through targeted fundraising efforts. Her experience includes working at nonprofits large and small with missions including healthcare, arts and culture, and education. She currently serves as Director of Development for the Natural Sciences Division at the ASU Foundation, where she leads fundraising efforts that support scientific research and student success.

**Course Overview & Goals:** This virtual course will help you: identify personal strengths and weaknesses in the six domains that are part of the CFRE exam; assess your personal level of readiness to take the exam; develop an effective personal study plan; and apply fundraising skills and knowledge to real-life fundraising scenarios. The course is formatted as a lunch and learn series – you can join us every week or for a specific topic. Each session will be active and engaging – expect to be asked to participate and contribute to the discussion.

**Who Should Attend:** Development professionals seeking to earn CFRE certification – for the first time or to recertify. We also welcome Executive Directors and members of the Board Development Committee who wish to add knowledge about fundraising practice to an organization’s operations and governance.

**Course Dates, Times, & Topics**

**Oct 20 @ 12-1pm | Are You Ready for the CFRE Exam?**

This session will introduce participants to the CFRE program. We will do a high-level review of the CFRE’s six knowledge domains and complete a self-assessment activity that will help you understand your skills and knowledge and develop an effective personal study plan.

**Oct 27 @ 12-1pm | Looking for Gold**

In this session we will review how research is used in fundraising and explore the key elements that make a successful research operation. Two activities will help you understand how to successfully organize the research function and identify qualified prospects for an organization’s activities. *Domain 1: Current & Prospective Donor Research.*

**Nov 3 @ 12-1pm | Prioritizing Your Prospects**

How do you balance your donors’ interests with your organization’s needs? This week we reflect on this critical question and will work through a scenario that will help you identify and prioritize target constituencies. *Domain 1: Current & Prospective Donor Research.*

**Nov 17 @ 12-1pm | Making a Development Plan**

Why should people give to your organization? In this session we will review the elements of a compelling case statement and complete two activities that will help you reflect and develop a framework for success so that you can bring your case to donors. *Domain 2: Securing the Gift*

**Nov 24 @ 12-1pm | Making the Ask**

There are so many ways to ask for support – but which one is the right one? In this session our activity will help you explore the primary ways that donors give. We will also discuss effective cultivation and solicitation to help you make the ask in real life. *Domain 2: Securing the Gift*

**Dec 1 @ 12-1pm | How Would You Raise $5M?**

In this session you will apply your knowledge about prospect research and securing the gift to a real-life case study of a capital campaign. Case studies help you use your fundraising skills and assess your personal level of readiness to take the CFRE exam. *Domains 1 & 2: Current & Prospective Donor Research and Securing the Gift.*

**Dec 8 @ 12-1pm | Are You Keeping Your Donors?**

In this session our activities focus on building a culture of philanthropy – what you do at your organization to recognize and retain donors who care about your cause. We’ll create purposeful cultivation plans that help bring donors closer to your organization and reflect on how we can optimize relationships. *Domain 3: Relationship Building.*

**Dec 15 @ 12-1pm | How to Build Relationships**

This session will give you the opportunity to put your relationship building skills to the test and to get feedback from your peers about how you cultivate potential donors. This is your chance to understand your strengths and opportunities for growth as you effectively communicate and sustain relationships for your organization. *Domain 3: Relationship Building.*

**Jan 5 @ 12-1pm | What Should the Development Director Do?**

The donor database is an Excel file…the board doesn’t fundraise…there’s no donor recognition program…and you’re losing donors each year. You’re the new Development Director – what do you do? In this session you will apply your knowledge about securing the gift and relationship building to a real-life case study. Case studies help you use your fundraising skills and assess your personal level of readiness to take the CFRE exam. *Domains 2 & 3: Securing the Gift and Relationship Building.*

**Jan 12 @ 12-1pm | Developing Effective Fundraising Volunteers**

How do you set up volunteers for success? In this session our activities will help us define clear roles for staff and volunteers and establish clear obligations and expectations. We’ll also discuss best practices for orienting, training, recognizing, and rewarding volunteers to help you develop successful partnerships. *Domain 4: Volunteer Involvement.*

**Jan 26 @ 12-1pm | How to Find a Great Volunteer**

Do you know what makes an awesome volunteer? In this session we’ll work together to identify best practices at your organizations for identifying and recruiting volunteers, getting to know volunteers, designing a volunteer recruitment program, and keeping your volunteers engaged. We’ll focus on the fundraising implications of having engaged volunteers. *Domain 4: Volunteer Involvement.*

**Feb 2 @ 12-1pm | Behind the Scenes**

Is your team ready to take your organization where it dreams of going? This week will be a deep dive behind the scenes – strategic planning, budgeting, and managing staff for fundraising success. We’ll also look at a staff management case study that will test your leadership skills. *Domain 5: Leadership & Management.*

**Feb 9 @ 12-1pm | Marketing for Fundraising**

Why do we market our fundraising efforts? In this session you will explore what successful marketing for fundraising looks like and apply concepts to your own organization. This is an opportunity for you to think creatively beyond what your organization currently does and dream about what is possible. *Domain 5: Leadership & Management.*

**Feb 23 @ 12-1pm | Red Flags and Gray Areas**

Why should the fundraising profession have standards, and what do they look like? It is ethics and accountability week – our activities will review what your stakeholders want to know, how to maintain records, how to know if your development plan is working, and how to hold your Board accountable to its legal responsibilities. This session will help you identify when you are in an ethically gray area and when you are marching toward a red flag. *Domain 6: Ethics & Accountability*

**Mar 2 @ 12-1pm | How Ethical Are You?**

An elderly donor who wants to change her will, a board member who wants to change the conflict of interest rules, a staff member who lied to a donor in a grant report…are you ready for an ethical dilemma? This week’s activity will help you explore problems and generate solutions – and consider what your best options are in real-life scenarios. *Domain 6: Ethics & Accountability*

**Mar 9 @ 12-1pm | Starting from Scratch**

This week’s challenge: how do you start a development program from scratch? In this session you will apply your knowledge about volunteers, leadership, and ethics to a real-life case study. Case studies help you use your fundraising skills and assess your personal level of readiness to take the CFRE exam. *Domains 4, 5, & 6: Volunteer Involvement, Leadership & Management, Ethics & Accountability*

**Mar 16 @ 12-1pm | Office Woes**

You’re a new staff member who has uncovered management issues with your fledgling development department – what do you do? In this session you will apply your knowledge about leadership and ethics to a real-life case study. Case studies help you use your fundraising skills and assess your personal level of readiness to take the CFRE exam. *Domains 5 & 6: Leadership & Management, Ethics & Accountability*

**Mar 23 @ 12-1pm | Preparing Your Study Plan**

You made it to the end! This session will be celebration, reflection, and planning for the rest of your CFRE journey. Our activities will help you design and plan your studies, review resources that are available to you to help you succeed and prepare you for your exam day.