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**Continuing Education Tracking Sheet**

*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.*

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**Name of CFRE Applicant:**

**Activity Organiser:** **Association of Fundraising Professionals Northeast Ohio Chapter**

**Title of Activity: Professional Development Series**

## **Date: 1/25/2018**

## Topic: **Data: A Fundraiser's Best Friend**

## Presenters:Dan Barney, Principal, Barney & Associates Consulting Services; Shannon Whalen, Business Intelligence Developer, Kent State University; Amy Wong, President, Dot Org Solutions; & Kristie Woods, Director of Development & Community Relations, St. Luke Foundation - St. Luke Lutheran Community (moderator)

## Location: Shaw Jewish Community Center, 750 White Pond Drive, Akron

## Time: 8:30 – 9:45 am

## Info: <http://afpneo.org/2018/m2018-01.htm>

## Credit Hours: 1.25

## Approved by CFRE: 1/12/2018

## **Date: 2/14/2018**

## Topic: **Planned Giving Basics 2018: All About Wills and Revocable Living Trusts**

## Presenters:Sue Figler, JD, Director of Development, Seton Catholic School; & Patrick Weschler, Esq., Partner, Buckingham Doolittle Burroughs

## Location: Huntington Training Room, 3421 Ridgewood Road, Fairlawn

## Time: 8:30 – 10:00 am

## Info: <http://www.afpneo.org/2018/lalpg.htm>

## Credit Hours: 1.5

## Approved by CFRE: 1/22/2018

## **Date: 2/21/2018**

## Topic: **Planned Giving Basics 2018: All About Charitable Gift Annuities and Strategies**

## Presenters:Toby Blossom, Vice-President - Senior Relationship Manager, Huntington Bank

## Location: Huntington Training Room, 3421 Ridgewood Road, Fairlawn

## Time: 8:30 – 10:00 am

## Info: <http://www.afpneo.org/2018/lalpg.htm>

## Credit Hours: 1.5

## Approved by CFRE: 1/22/2018

## **Date: 2/22/2018**

## Topic: **Are You Prepared? The Benefits of an Organizational Analysis Before You Fundraise**

## Presenters:Jenny Goldberg, CFRE, Vice President, Aly Sterling Philanthropy

## Location: Shaw Jewish Community Center, 750 White Pond Drive, Akron

## Time: 8:30 – 9:45 am

## Info: <http://afpneo.org/2018/m2018-02.htm>

## Credit Hours: 1.25

## Approved by CFRE: 2/12/2018

## **Date: 2/28/2018**

## Topic: **Planned Giving Basics 2018: All About Charitable Remainder Trusts and Charitable Lead Trusts and Strategies**

## Presenters:Don Laubacher, CPA, Senior Vice President, Sequoia Financial; & Julie Firestone Esq., Attorney, Brouse McDowell

## Location: Huntington Training Room, 3421 Ridgewood Road, Fairlawn

## Time: 8:30 – 10:00 am

## Info: <http://www.afpneo.org/2018/lalpg.htm>

## Credit Hours: 1.5

## Approved by CFRE: 1/22/2018

## **Date: 3/7/2018**

## Topic: **Planned Giving Basics 2018: All About Insurance Gifts and Gift Acceptance Policies**

## Presenters:Dell Judd, Senior Vice President, Business Development, Oswald Companies; & Jessica Grashoff, Esq.,Gift Planning Officer, University Hospitals

## Location: Huntington Training Room, 3421 Ridgewood Road, Fairlawn

## Time: 8:30 – 10:00 am

## Info: <http://www.afpneo.org/2018/lalpg.htm>

## Credit Hours: 1.5

## Approved by CFRE: 1/22/2018

## **Date: 3/14/2018**

## Topic: **Planned Giving Basics 2018: All About Donor Advised Funds and Family Foundations**

## Presenters:Laura Fink, CFRE, Director of Development and Professional Advisor Relations, Akron Community Foundation; & Toby Blossom, Vice-President - Senior Relationship Manager, Huntington Bank

## Location: Huntington Training Room, 3421 Ridgewood Road, Fairlawn

## Time: 8:30 – 10:00 am

## Info: <http://www.afpneo.org/2018/lalpg.htm>

## Credit Hours: 1.5

## Approved by CFRE: 1/22/2018

## **Date: 3/22/2018**

## Topic: **Once Upon a Time: Best Ways to Share Impactful Stories**

## Presenters:June Kucalaba, Marketing and Identity Manager, Stark County District Library; Anne Merchant, Director Corporate Communications, Akron Children's Hospital; David Walker, Vice President of Sales, FORM

## Location: Shaw Jewish Community Center, 750 White Pond Drive, Akron

## Time: 8:30 – 9:45 am

## Info: <http://afpneo.org/2018/m2018-03.htm>

## Credit Hours: 1.25

## Approved by CFRE: 3/20/2018

## **Date: 4/13/2018**

## Topic: **Career Success Institute: Join the AFP Fundraising Superheroes!**

## Presenters:Kishshana Palmer, CFRE - CEO, Kishshana & Co.; Ceci Dadisman - Digital Marketing Manager, FORM; Ben Bisbee - Founder + Principal, Rhinocorn Consulting; Mary Douglas - Director, Grants Administration, Akron Children's Hospital; and Tim Ardillo, CFRE - Consultant, Johnson, Grossnickle and Associates

## Location: Embassy Suites Akron-Canton Airport, 7883 Freedom Ave NW, North Canton, OH 44720

## Time: 7:45 am – 2:00 pm

## Info: <http://www.afpneo.org/2018/csi/csi.htm>

## Credit Hours: 3.25

## Approved by CFRE: 2/5/2018

## **Date: 5/24/2018**

## Topic: **Lighting Fires! Using the Passion in Your Board to Fundraise**

## Presenter:Joel Fox, Chief Development Officer, Menorah Park Foundation

## Location: Shaw Jewish Community Center, 750 White Pond Drive, Akron

## Time: 8:30 – 9:45 am

## Info: <http://www.afpneo.org/2018/m2018-05.htm>

## Credit Hours: 1.25

## Approved by CFRE: 4/24/2018

## **Date: 6/28/2018**

## Topic: **The Capital Campaign: How to Prepare for the 59th Minute in Your Busiest Hour**

## Presenter:Vivian Smith, CFRE, Executive Director, LMH Foundation

## Location: Canton Museum of Art, 1001 Market Ave N, Canton

## Time: 4:30 – 5:30 PM

## Info: <http://www.afpneo.org/2018/m2018-06.htm>

## Credit Hours: 1.0

## Approved by CFRE: AFPI WEBINAR

## **Date: 8/23/2018**

## Topic: **In-Kind Gifts: When Cash is King and the Queen Comes Knocking!**

## Presenter:Ken Frisch, ACFRE, FAFP, has more than 40 years of experience in all areas of development.

## Location: Shaw Jewish Community Center, 750 White Pond Drive, Akron

## Time: 8:00 – 9:45 am

## Info: <http://afpneo.org/2018/m2018-08.htm>

## Credit Hours: 1.25

## Approved by CFRE: 8/1/2018

## **Date: 9/6/2018; 9/7/2018 ; 9/13/2018; 9/14/2018**

## Topic: **Principles & Techniques of Fundraising**

## Presenter:Lilly Family School of Philanthropy

## Location: Aultman Health Foundation, 2600 Sixth St. SW Canton, OH. 44710

## Time: 8:30 am – 5:00 pm

## Info: <http://www.afpneo.org/2018/lalstark.htm>

## Credit Hours: 27 (6.75 hours each day)

## Approved by CFRE: 7/18/2018

## **Date: 9/18/2018**

## Topic: **The Danger of a Single Story**

## Presenter:Amanda Cooper, PhD, Director of SHIFT Consulting at The Diversity Center of Northeast Ohio.

## Location: Shaw Jewish Community Center, 750 White Pond Drive, Akron

## Time: 8:00 – 9:45 am

## Info: <http://afpneo.org/2018/m2018-09.htm>

## Credit Hours: 1.25

## Approved by CFRE: 8/13/2018

## **Date: 9/20/2018**

## Topic: **Seeking Gifts from Local Family Foundations & Donor Advised Funds**

## Presenter:Phil Maynard, The Maynard Family Foundation Roger Read, The Read Family Fund Marilyn Buckey, Marilyn Meyers Buckey Family Fund Margaret Medzie, V.P. and Chief Development Officer, Akron Community Foundation

## Location: Weathervane Playhouse,1301 Weathervane Lane, Akron

## Time: 7:30 – 9:30 am

## Info: <http://afpneo.org/2018/m2018-09c.htm>

## Credit Hours: 1.5

## Approved by CFRE: 9/11/2018

## **Date: 12/13/2018**

## Topic: **Year-End Fundraising Essentials: Updates on Taxes and Charitable Planning**

## Presenter:Rachel Roan, CPA, Senior Tax Accountant, Cohen & Company & Laura Springer, CFP, CRPC, Senior Manager, Private Client Services, Sequoia Financial Group

## Location: Cohen & Company, 3500 Embassy Parkway, Suite 100, Akron, OH

## Time: 8:00 – 9:45 am

## Info: <http://afpneo.org/2018/m2018-12.htm>

## Credit Hours: 1.25

## Approved by CFRE: 11/14/2018

### Total number of points attained: