



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.

Name of CFRE Applicant:

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

Title of Activity: **Professional Development Series**

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Date:

2/18/2021

Topic:

Understanding & Relating to Diverse Donors & Communities ... Taking It to the Next Level!

Presenters:

Dr. Cristina González Alcalá, Community Investment Officer, Akron Community Foundation (moderator); Amanda Cole, Executive Director, Plexus LGBT + Allied Chamber of Commerce; Stephanie Koontz, Director of Alumni Relations, Walsh University; Debra Valentine-Gray, Director of Regional Advancement, Indiana University of Pennsylvania (Retired); Kasey Willener, Assistant Director of Development, The University of Akron

Location:

ONLINE

Time:

8:30 – 9:45 am

Info:

<http://www.afpneo.org/2021/m2021-02.htm>

Credit Hours:

1.25

Approved by CFRE:

1/28/2021

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Date:

2/24/2021

Topic:

Planned Gifts that Can Be Set Up Without the Assistance of an Attorney

Presenter:

Patrick Weschler, Partner at Buckingham Doolittle

Location:

ONLINE

Time:

9:00 - 10:15 am

Info:

<https://afpneo.org/2021/m2021-02LAL.htm>

Credit Hours:

1.25

Approved by CFRE:

1/28/2021

☐ **Date:** **3/18/2021**
Topic: **A Lifelong Relationship: Keeping Your Corporate Donors Engaged**
Presenters: Mella A. Castner (moderator), Director of Development, Akron Rotary Camp; Joni Fitch, Manager, Global Community Engagement, The Goodyear Tire & Rubber Company; Tamara Fynan, Senior Advisor, Communications & Charitable Giving, The J.M. Smucker Company; Michelle Primm, Managing Partner, Cascade Auto Group; Lorna Wisham, Vice President, Corporate Affairs & Community Involvement & President, FirstEnergy Foundation
Location: ONLINE
Time: 8:30 – 9:45 am
Info: <https://afpneo.org/2021/m2021-03.htm>
Credit Hours: 1.25
Approved by CFRE: 2/23/2021

☐ **Date:** **4/28/2021**
Topic: **Proactive Legacy Planning Using Life Insurance**
Presenters: Presented by Randall Keller. Learn how to help donors maximize their legacy plans with life insurance.
Location: ONLINE
Time: 9:00-10:15am
Info: <http://www.afpneo.org/2021/m2021-04LAL.htm>
Credit Hours: 1.25
Approved by CFRE: 1/28/2021

☐ **Date:** **4/29/2021**
Topic: **AFPNEO's Focus on Philanthropy Virtual Conference**
Presenters: Amy Eisenstein, ACFRE, et al.
Location: ONLINE
Time: 8:30 am – 12:15 pm
Info: <http://afpneo.org/2021/focus.htm>
Credit Hours: **Breakout session 1 @ 0.75 credits:**
☐ 1A - The Major Gifts Challenge: How to Raise Big Gifts from Individual Donors ... presented by Amy Eisenstein
☐ 1B - Using Automated Email to Build & Maintain Relationships ... presented by Ceci Dadisman
☐ 1C - In the Donor's Mind: The Science of Giving ... presented by Daniel Mansoor
Breakout session 2 @ 0.75 credits:
☐ 2A - The Major Gifts Challenge: How to Raise Big Gifts from Individual Donors ... presented by Amy Eisenstein (repeat of 1A)
☐ 2B - Don't Let Your Database Get You Down! Tips, Tricks and Strategies to Get Your

Data Working for You ... presented by Amy Wong

☐ 2C - Planting the Giving Tree - A Legal Perspective ... presented by Susan Figler, JD, MA

Keynote session @ 1.0 credit:

☐ Happiness, Habits and Fundraising: Strategies to Survive and Thrive ... presented by Amy Eisenstein

Conference total: 2.5 credits

Approved by CFRE: 2/23/2021



Date:

6/17/2021

Topic:

Engaging Next Gen Donors

Presenters:

Presented by Karen Hrdlicka. Learn the 4 services areas of The Center for Family Philanthropy, define who Next Gen donors are and what they care about and outline the 10 best practices for fundraisers to engage Next Gen donors based on published research.

Location:

ONLINE

Time:

9:00-10:15am

Info:

<http://www.afpneo.org>

Credit Hours:

1.25

Approved by CFRE: 6/4/2021



Date:

8/12/2021

Topic:

Building a Major Gifts Program-The Art & Science of Major Gift Fund Raising

Presenters:

Building a major gifts program requires a review of the organization's total funds development effort. How do you know you're ready to begin a major gifts effort? What should you consider as you approach this new endeavor, or bring new energy while seeking to go to the next level with your donors? There's both science and art to the relationships you will develop with your donors. You will learn how to identify prospects as well as the art of a successful cultivation program leading to the donor visit and conversation.

Location:

Presented by: Terri Bate, Director of Philanthropy, United Way of Greater Stark County
HYBRID: ONLINE and IN PERSON-St. George's Serbian Orthodox-Serbian Center, 4667 Applegrove St. NW, North Canton, OH, 44720, US

Time:

8:15am-10:30am

Info:

<http://www.afpneo.org>

Credit Hours:

1.50

Approved by CFRE: 8/8/2021

☐ **Date:** **September 15-October 13th 2021**
Topic: **Planned Giving Series from Leave a Legacy Summit-Portage-Medina Counties**
Presenters: Part of the annual series
Location: Huntington Bank Training Center
Time: 8:30-10:00 am
Info: <http://www.afpneo.org>
Credit Hours: 7.5 or 1.5 points per session
Approved by CFRE: **7/19/2021**

Date: **September 16, 2021**
Topic: **Grant Seeking, Writing, and Management-The Secrets to Successful Grant Funding for Your Organization**
Presenters: Dawn Moeglin and Lauren Steiner
Location: Online
Time: 8:30-10:00 am
Info: <http://www.afpneo.org>
Credit Hours: 1.50
Approved by CFRE: **9/3/2021**

Total number of points attained: _____