



## CONTINUING EDUCATION POINTS TRACKER

*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.*

**Activity Organizer:** - Association for Healthcare Philanthropy  
**Title of Activity:** - 2023 Madison Institute: Major Gift Initiatives and the Campaign  
**Names of Presenter(s):** - Various  
**Dates and Location:** - July 16-21, 2023 – Madison, WI

### **Date: July 16, 2023**

#### **Session 1: 5:00 pm – 6:30 pm (1.5 pts)**

- Introductions and Course Preview

### **Date: July 17, 2023**

#### **Session 1: 8:00 am – 9:00 am (1.0 pts)**

- General Session: State of the Union of Healthcare Philanthropy

#### **Session 2: 9:00 am – 10:30 am (1.5 pts)**

- Overview of Campaigns and Emerging Trends

#### **Session 3: 10:45 am – 11:45 am (1.0 pts)**

- DEI Initiatives Integrated into the Campaign

#### **Session 4: 1:00 pm – 2:00 pm (1.0 pts)**

- Building the Master Campaign Plan

#### **Session 5: 2:00 pm – 3:00 pm (1.0 pts)**

- Developing the Case for Support

#### **Session 6: 3:15 pm – 4:15 pm (1.0 pts)**

- Campaign Readiness

#### **Session 7: 4:15 pm – 5:00 pm (0.75 pts)**

- Faculty and Group Wrap-Up

### **Date: July 18, 2023**

#### **Session 1: 7:30 am – 8:30 am (1.0 pts)**

- General Session: Inclusive Philanthropy

#### **Session 2: 8:30 am – 9:30 am (1.0 pts)**

- The Profile of Top Leadership

#### **Session 3: 9:30 am – 10:30 pm (1.0 pts)**

- The Magic of Employees Engaged in a Campaign

#### **Session 4: 10:45 am – 11:30 pm (0.75 pts)**

- Inclusive Philanthropy

#### **Session 5: 11:30 am – 12:15 pm (0.75 pts)**

- Building & Managing Your Portfolio

#### **Session 6: 1:30 pm – 2:30 pm (1.0 pts)**

- Mining Your Database for Campaign Gifts

#### **Session 7: 2:30 pm – 3:30 pm (1.0 pts)**

- Grateful Patient Work Within a Campaign

#### **Session 8: 3:45 pm – 4:30 pm (0.75 pts)**

- Engaging Clinical Partners Within a Campaign

Courses Marked **NFR** (Non Fundraising Related) may be counted towards the 10 point maximum of NFR Courses on the initial CFRE application and the 5 point maximum on the re-certification application.

Find more **CFRE approved** continuing education opportunities on **My Education Finder**:  
<http://www.cfre.org/continuing-education/my-education-finder/>

**Date: July 19, 2023**

**Session 1: 7:30 am – 8:30 am (1.0 pts)**

- General Session: Privacy

**Session 2: 8:30 am – 10:00 pm (1.5 pts)**

- Annual Giving to Advance the Campaign

**Session 3: 10:15 am – 11:00 pm (0.75 pts)**

- Individual Plans & Lifecycle of a Donor

**Session 4: 11:00 am – 12:00 pm (1.0 pts)**

- Volunteer Motivation, Management and Training (Engaging Donors on the Outside)

**Session 5: 12:00 pm – 12:45 pm (0.75 pts)**

- Marketing the Campaign

**Date: July 21, 2023**

**Session 1: 8:30 am – 9:30 am (1.0 pts)**

- Keeping Score: What to Count and How to Count It

**Session 2: 10:00 am – 11:00 am (1.0 pts)**

- Recognition & Stewardship in the Campaign

**Session 3: 11:00 am – 12:00 pm (1.0 pts)**

- Securing the Visit and Making the Call

**Session 4: 1:15 pm – 2:30 pm (1.25 pts)**

- Planned Giving in the Campaign

**Session 5: 2:30 pm – 3:15 pm (0.75 pts)**

- Faculty Panel – Rapid Fire Questions

**Session 6: 3:30 pm – 4:15 pm (0.75 pts)**

- Navigating Difficult Conversations

**Session 7: 4:15 pm – 5:00 pm (0.75 pts)**

- Group Project Work

**Date: July 21, 2023**

**Session 1: 8:45 am – 9:45 am (1.0 pts)**

-Group Project Workshop

**Session 2: 10:00 am – 10:45 am (0.75 pts)**

-Group Project Workshop

**Total number of points attained: \_\_\_\_\_**

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