



## 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: Philanthropy Operations  
**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)**

- Welcome and Introductions

**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: 9:30 am – 10:30 am (1.0 pts)**

- The Role of Operations Leaders

**Session 3: 10:30 am – 11:30 am (1.0 pts)**

- Advanced Operations Leadership Discussion

**Session 4: 12:30 pm – 2:00 pm (1.5 pts)**

- Benchmarking

**Session 5: 2:30 pm – 4:00 pm (1.5 pts)**

- Group Activity

**Date: July 18, 2023**

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

- General Session: Inclusive Philanthropy

**Session 2: 9:30 am – 11:00 am (1.5 pts)**

- Data Governance-HIPAA, Privacy & DEI

**Session 3: 11:00 am – 12:15 pm (1.25 pts)**

- Ethics in Philanthropy

**Session 4: 1:30 pm – 3:00 pm (1.5 pts)**

- Prospect Development Overview and the Case for Relationship Management

**Session 5: 3:30 pm – 5:00 pm (1.5 pts)**

- Group Activity/Classroom Discussion

**Date: July 19, 2023**

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

- General Session: Privacy

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

- Best Practices in Grateful Patient Programming

**Session 3: 10:45 am – 12:00 pm (1.25 pts)**

- Technology and Artificial Intelligence

**Date: July 20, 2023**

**Session 1: 9:00 am – 10:30 am (1.5 pts)**

- Finance, Accounting, and Budget Overview

**Session 2: 10:45 am – 12:00 pm (1.25 pts)**

- Data Reporting, Business Intelligence, and Analytics

**Session 3: 1:30 pm – 3:00 pm (1.5 pts)**

- Group Activity/Class Discussion

**Date: July 21, 2023**

**Session 1: 9:00 am – 10:00 am (1.0 pts)**

- Faculty Panel

**Session 2: 10:15 pm – 11:45 pm (1.5 pts)**

- Group Projects

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

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/>