



## Continuing Education Provider Approval Application Tips

1. The first page of the application (contact details, etc.) can be completed once, saved to your computer, and simply printed out again for any subsequent submissions.
2. Page 3 requires the event-specific details. This is the primary page that needs to be completed and updated with *each* submission.
3. Simply attach (electronically or via hard copy) the promotional flier for your programme OR a MSWord document that includes the final session descriptions and timeline for the event.
4. Write directly on the attached materials, next to the session titles or descriptions, the code that matches the content covered in the session. A simple notation is all that is required. If more than one topic is covered, simply write: 1, 4

**Codes:**

- 1 = Prospect identification / database management or setup
  - 2 = Securing the Gift (includes case statements; all fundraising strategies; programme evaluation)
  - 3 = Relationship Building (includes all marketing, communication, cultivation topics)
  - 4 = Volunteer Involvement
  - 5 = Management (budgeting, finance, strategic planning, creating development plans; staff management; HR)
  - 6 = Accountability (includes reporting topics, legal/regulatory, ethics)
5. Organisations with multiple meetings can submit them all at once for the year, or submit programmes individually or in groups as details become available.

For events with concurrent sessions, CFRE International will produce a tracking sheet for distribution to attendees. In addition, if a year's worth of events are submitted all together, CFRE International will produce a tracking sheet for all the organisation's events that year for ease of tracking and additional promotion among your membership.

6. Mail, email ([jessicam@cfre.org](mailto:jessicam@cfre.org)), or fax (+1 703.820.1107) materials to CFRE International. Please do so at least 30 days in advance of the date by which you need the materials. If you wish to have the approval for promotional materials, please submit far enough in advance.
7. For assistance, contact Jessica Millhiser, at: [jessicam@cfre.org](mailto:jessicam@cfre.org) or +1 703.820.5555, x102



**A. Event Information** (if applying for multiple events at once, please submit one page for each event):

Event Title: \_\_\_\_\_

Start Date (mm/dd/yyyy): \_\_\_\_/\_\_\_\_/\_\_\_\_

End Date (mm/dd/yyyy): \_\_\_\_/\_\_\_\_/\_\_\_\_

Event Format:  In-person sessions  
 Audio-conference  
 Web-based conference  
 On-line training

**B. Please provide location if an in-person event:**

Event Address: \_\_\_\_\_

City: \_\_\_\_\_ State/Province: \_\_\_\_\_ Postal Code: \_\_\_\_\_

Country: \_\_\_\_\_

**C. Programme Content:**

Name of person(s) or entity responsible for making decisions about the content of this event: \_\_\_\_\_

**D. Programme Evaluation:**

Please indicate how participants evaluate the content / presentation of this event:

No evaluation       Rating evaluation / survey       Focus groups

**E. Learning Objective Assessment:**

Please indicate how presenter(s) assess whether or not participants have achieved learning objectives (check all that apply):

Written exam/test       Question(s) on rating evaluation/ survey  
 Personal follow-up       None

**F. Type of Programme**

Please indicate what type of programme this application is for:

**Multi-session event, such as a conference with concurrent sessions from which attendees have choices of what to attend during the same time block** (attach programme or flier with session description(s) and time allocation(s). The final printed version is not required, as long as the details included are *final*).

**Single session event, such as a workshop or seminar where attendees do not choose among several sessions offered.** (attach programme or flier with session description(s) and time allocation(s). The final printed version is not required, as long as the details included are *final*).

Applicant ***must*** attach one of the following items listed above. Attached details must include:

- Session titles and content descriptions
- Time allocation for each session

A MS Word document (if it contains final details) is sufficient OR a promotional programme flier or brochure (if it contains session descriptions and timeline) can simply be attached.

**For each session offered**, the applicant must indicate which of the following content areas is the ***main focus*** of the session. For sessions in excess of one and one half hours (1.5 hrs), more than one content area can be listed, if necessary. **Content code numbers** can simply be noted in the margins of your submitted descriptions.

<b>Content Code Number</b>	<b>Content Area</b>
<b>1</b>	<b>Current and Prospective Donor Research</b> - includes prospect research, analysis and data management
<b>2</b>	<b>Securing the Gift</b> - includes case statements, fundraising programme planning, specific fundraising techniques, and fundraising programme evaluation
<b>3</b>	<b>Relationship Building</b> - includes communications and marketing topics, messaging
<b>4</b>	<b>Volunteer Involvement</b> - includes all aspects of volunteer recruitment, training, management and recognition
<b>5</b>	<b>Management</b> - includes financial, programme and staff management
<b>6</b>	<b>Accountability</b> - includes ethics, legal requirements, law/rules/regulations, privacy laws, stewardship
<b>NFR</b>	<b>Non-Fundraising Related</b> - important, relevant skills but not unique to fundraising

## Education Review:

CFRE International will conduct a review of the education submission to assure it meets the CFRE International *Continuing Education Credit Policy*. The provider will be sent formal notice of approval in writing to the main contact information submitted above.

Only those programmes which are deemed as having met the current CFRE International *Continuing Education Credit Policy* will be approved for continuing education credit.

Providers will be supplied with the following:

- a Continuing Education Tracking Sheet for approved activities which have multiple sessions,
- a formal determination of the number of applicable points,
- permissible promotional language
- a listing on the CFRE International website [www.cfre.org](http://www.cfre.org)

Providers are encouraged to submit applications for approval **at least thirty (30) days in advance.**

Determination of total continuing education points awarded for approved sessions is at the sole discretion of CFRE International.

## Continuing Education Approved Provider Agreement

The Continuing Education Approved Provider (Provider) attests that the Provider has read CFRE International's Continuing Education Credit Policy and this Continuing Education Approved Provider Agreement (Agreement), understands them, and agrees as a condition of approval to abide by all requirements.

The Provider attests that all programs offered for CFRE International continuing education credit are and will remain correct and current in content and format, and contribute to increasing the professional competency of CFRE certificants.

Course Content: Continuing Education activities reported to CFRE International must be in subject areas covered on the CFRE Text Content Outline. The Test Content Outline is located in the CFRE International Candidate Handbook and on the CFRE website at [www.cfre.org](http://www.cfre.org), click on Exam Information.

### FUNDRAISING CONTENT:

- Current and Prospective Donor Research
- Securing the Gift
- Relationship Building
- Volunteer Involvement
- Management
- Accountability

#### NON-FUNDRAISING CONTENT:

CFRE International recognises that certain continuing education opportunities, while not directly fundraising related, will enhance your performance as a fundraising professional. Examples of such courses include: technology training, software package training, human resource principles, and personal development such time management skills.

Providers are not to submit to CFRE International programs in any subject area other than those designated above.

This Agreement and Provider's approval with CFRE International shall remain in effect for a maximum of one twelve-month period as indicated in the Approved Provider Determination letter. Providers have the option of renewing its application for subsequent programmes or periods. If Provider fails to reapply, the Provider shall no longer have approval with CFRE International.

**Program Standards:** The Provider agrees that its Program(s) meet, and will continue to meet, the following requirements. Programmes assist fundraisers to:

- obtain current professional development information
- explore new knowledge in specific content areas
- master new fundraising-related skills and techniques
- expand approaches to effective fundraising
- further develop professional judgment
- conduct professional practice in an ethical and appropriate manner
- Programs are developed by persons qualified in the subject matter;
- Program content is current, correct and presented in appropriate design and format
- Program titles accurately represent the course content and purpose; and

**Program Acceptance and Advertising:** In consideration for compliance with this agreement, the Provider understands that after acceptance by CFRE International of submitted Programs and receipt of appropriate fees, it may advise prospective attendees of the number of continuing education points granted.

The Provider agrees that it will only provide such notification by indicating that Program has been "accepted by CFRE International" or that continuing education points have been "granted by CFRE International."

The Provider agrees not to, in any way, explicitly or implicitly, state or imply that CFRE International has accepted a Program or granted continuing education points unless such Program has, in fact, been accepted by CFRE International and been sent an Official Notice of Determination. Provider agrees not to state or imply that CFRE International has made a determination on the merits or quality of the Program, including but not limited to that the Provider or its Programs have been "accredited" or "approved" by CFRE International.

**CFRE International's Trademark Rights:** The Provider hereby agrees and acknowledges that CFRE International is the sole, absolute and exclusive owner of all rights, title, and interest in and to the marks CFRE™, Certified Fund Raising Executive™ and CFRE stylised logo (Marks).

**Restrictions.** Without limiting the other terms set forth in this Agreement, unless otherwise approved by CFRE International in writing, the Provider shall not, directly or indirectly: (i) use the Marks in conjunction with the provision of any financial services; (ii) use the Marks in conjunction with the sale of any tangible goods; (iii) use the Marks in conjunction with the provision of any services, except the promotion and conduct of the offering of its approved Programmes; (iv) certify individuals to use the Marks; (vii) state or imply that CFRE International has made a determination on the merits or quality of any Program that is intended to meet its continuing education requirements.

**Fees:** All fees are subject to change and are non-refundable. The Provider must pay a fee to have materials reviewed for approval as a Provider

**Indemnification:** the Provider hereby agrees to defend and indemnify CFRE International, its officers, agents, affiliates, and employees from any liability, including all claims, demands, losses or liabilities of any kind, that may arise as a result of its offering the Program(s) for CFRE International continuing education points, or out of CFRE International's acceptance of such Program(s) for continuing education points.

**Limitation of Liability:** CFRE International is not liable for any direct, indirect, consequential, incidental, special or enhanced damaged arising out of approval of a programme or inability to use CFRE marks.

**Termination by CFRE International.** This Agreement may be terminated by CFRE International, if CFRE International, in its sole discretion, determines that the Provider at any time fails to comply with any provision of the Guidelines or this Agreement. CFRE International shall provide thirty (30) days written notice to the Provider, specifying the nature of the non-compliance. If within the thirty (30) day period, the Provider cures the non-compliance to the satisfaction of CFRE International, this Agreement shall not terminate. However, if the Provider fails to correct the non-compliance to the satisfaction of CFRE International within the thirty (30) day period, the Provider shall be deemed in breach of this Agreement, and CFRE International may terminate this Agreement upon notice to the Provider. In the event the Provider performs an egregious act which reflects unfavourably upon CFRE International, or jeopardizes the Marks, CFRE International shall have the right to terminate this Agreement immediately.

Upon termination of this Agreement for any reason: (i) all rights granted to the Provider under this Agreement shall immediately cease; (ii) CFRE International shall remove the Provider's name and/or Program from CFRE International's list of Approved Continuing Education Providers upon the next version of any printed publication containing such list, and upon the next revision to any website bearing such list; (iii) the Provider shall immediately destroy all materials bearing the Marks, and shall further cease and desist from any further use of the Marks or any further reference to them, either directly or indirectly; and (iv) the Provider shall not use any of the Marks or any trademark or name confusingly similar thereto. Removal of the Provider from such lists shall not limit any other action CFRE International may take with respect to misuse of the Marks, including the infringement of any CFRE International trademark.

**Termination by Provider.** The Provider may terminate this Agreement for any reason upon thirty days (30) days advance written notice to CFRE International.

We understand and agree that failure to comply with any or all of this agreement and/or failure to meet acceptable standards in our Programs, as determined by CFRE International, may result in termination of our sponsorship and/or of acceptance of our Program(s) and that notice of such termination may be given by CFRE International to all CFRE certificants. We hereby agree to comply with all of the foregoing terms and conditions.

**Signature** \_\_\_\_\_

**Print name:** \_\_\_\_\_

**On behalf of (applicant organisation):** \_\_\_\_\_

**Date:** \_\_\_\_\_