

## A MESSAGE FROM THE PRESIDENT OFF AND RUNNING IN 2016

Dear Members:

In our 36th year, AFP's Genesee Valley Chapter is off to a great start. In January, we worked with the Estate Planning Council to present an in-depth planned giving program that attracted more than 150 guests. In early March, AFPGV member Dana Miller, CFRE, VP of Advancement at the Rochester Area Community Foundation, shared a terrific program on charitable gift annuities. We've held two webinars, and our networking groups such as Solo Shops, Seasoned and Young Professionals remain active. We have recently received our Friends of Diversity designation and, since January 1, we have added 13 new members.



As a fundraiser, are you well past the starting line? Have you been in this field for at least three years? If so, consider earning your credential as a Fundraising Professional. I highly recommend the CFRE Review course coming up on April 14 & 15. Following the course, you'll have several options to take an exam to receive your certification as a CFRE.

Coming up on April 28 is our Annual Regional Conference, "Rethinking Philanthropy." This quality, half-day program includes two general sessions and two different tracks for a total of six insightful sessions. I do hope that you will attend and/or will encourage a fellow staff or board member to attend. You'll be sure to pick up information that will help you make strides in your work. Keeping our pace later in the year, we will "meet the funders" on October 20 and will celebrate local philanthropy on November 4. Please save these dates!

I congratulate our board and committee members whose contributions to the Chapter continually make for wonderful programs, promotion and networking opportunities. It is gratifying to be a member of such an active and healthy organization. I know that like me, our members find value in these sessions and social gatherings, enabling us all to do our jobs ever better. Together, our work continually benefits the community, making Rochester and the surrounding area ever better, ever healthier, as well.

Hope to see you on April 28!

Sincerely,



Anne McKenna, CFRE  
Director of Development and Communications  
St. Joseph's Neighborhood Center, Inc.

## AFPGV Honored with Friends of Diversity Designation

AFP Genesee Valley Chapter is proud to be named a 2015 Friends of Diversity Designation Chapter. This is the first time our chapter has earned this recognition. Of the 243 chapters in AFP internationally, only 74 chapters received the 2015 designation. Congratulations to all who made this possible.

"I am very pleased that the Genesee Valley Chapter of AFP has received this important designation," said AFPGV President, Anne McKenna. "In the past year, our Board of Directors and our members have worked hard to establish the John Williams Diversity Scholarship, to hold round-table discussions on the topic of diversity, and to incorporate diversity and inclusion goals into our program planning and membership recruitment. Recognition for these efforts is very gratifying. My thanks to all members who led and participated in these efforts."

Criteria for the award are determined by AFP International, and goals are published annually. It is AFPGV's intention to make this designation an annual occurrence and we invite your suggestions on how we can best make our chapter a valued resource for all members of the fundraising community. For more information on the Friends of Diversity Designation process, please visit [www.afpnet.org](http://www.afpnet.org).

Association of Fundraising Professionals  
- Genesee Valley Chapter

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Chapter & Verse newsletter

Karly Marshall, Editor  
Wayne Bulling, Graphic Design

## 2016 CONFERENCE TO FEATURE REGIONAL EXPERTS

AFPGV is pleased to offer an exceptional educational opportunity for advancement professionals and non-profit leaders that is close to home and reasonably priced. According to 2016 Conference Chair Tracy Kroft, “we are delighted to have this year’s group of dynamic presenters – rebels, renegades and pioneers, to be sure – giving us their perspectives of what has been, what is, and what will be as we Rethink Philanthropy.” The format of this year’s conference will include two distinct tracks with joint plenary and keynote sessions.

The Conference will be held on Thursday, April 28 at the RIT Inn and Conference Center. The day will lead off with networking and a continental breakfast at 7:45 a.m. The sessions begin at 8:30 a.m. and continue through 1:30 p.m. Attendees may choose the full conference option which includes sessions, luncheon and keynote, or just join us for luncheon and keynote.

Inspirational remarks from Daniel M. Meyers, President of Al Sigl Community Agencies, will kick off this unique conference at 8:45am. Meyers’ whimsical presentation will offer attendees perspectives on the changing field of philanthropy and provide a forecast for the future.

The track sessions will offer glimpses into some of the most exciting new trends in philanthropy. During Track 1 attendees will choose between concurrent sessions from Nancy Zawacki (University of Rochester) on leadership annual giving, and Laura Garrison and Kathy Reed (WXXI/The Little) about donor stewardship and recurring revenue streams.

Likewise, Track 2 will give attendees a choice between Dr. Richard Gangemi and Katie Bresnan (Rochester Regional Health Foundation) speaking on partnering with organizational leadership, and Shannon Struzik and Jenna Van Thof (Dixon Schwabl) speaking about the newest trends in special events.

Conference participants will then join each other for a luncheon and keynote session you won’t want to miss! Hank Rubin, VP of Community Programs at Rochester Area Community Foundation, will discuss the future of funding for our area that includes significantly more than just fundraising. He’ll also generate important conversation for you to share with your leadership.

Attendance at this year’s conference is a must for nonprofit organizations of all sizes because it covers topics that affect everyone. Take advantage of this opportunity to “Rethink Philanthropy” and attend this value-priced, half-day event.

We won’t even charge you for parking! Go to [www.afpgv.org](http://www.afpgv.org) now to register for extra savings.

Full participation is applicable for 4.0 points in category 1B – Education for CFRE initial application and/or recertification.

Thank you to our Lead Sponsors: Mailstar, University of Rochester, Rochester Regional Health System, Greater Giving and Manning & Napier. Also, we have a great array of exhibitors who are eager to share information with attendees. Call the AFPGV office at 585-586-7810 and reserve your space today! ☁

# RETHINKING PHILANTHROPY



### Presenting Sponsors



### Lead Sponsor

**ROCHESTER**  
REGIONAL HEALTH

### Partner Sponsors



## MEMBER SPOTLIGHT

## Alyssa Whitfield

**Organization/Position**

Dress for Success Rochester Founder/Executive Director

**How long have you worked in fundraising?**

I'm a newbie!

**What's your favorite part about working in fundraising?**

Helping donors connect with meaningful projects that will increase their impact on the community.

**Why did you become a member of AFP?**

I wanted to join AFPGV because although I was fortunate to have some generous people in my corner when I founded Dress for Success, I wanted to repay their kindness by learning the ins and outs of donor relations and stewardship.

**What is your favorite non-fundraising thing about Rochester?**

I love the music, food and fashion scene in Rochester. Every week there's some fabulous event to go to!

**What are some of your favorite hobbies?**

I love fashion and finding vintage or designer looks at a bargain is my game! I'm also a karaoke queen.

**Where is your favorite place to eat in Rochester?**

I love everything about Tony D's! For a special night out I'll go to Black and Blue.

**What is one office supply you couldn't live without?**

I could not live without my colorful Post-its. My desk gets pretty cluttered sometimes, so I stick notes on stuff to remember why I'm keeping it.

**What did winning the John Williams Diversity Scholarship mean to you?**

I was so happy to win the John Williams Scholarship! It allowed me to join AFP at a time when it wouldn't have been possible. It will surely help me take Dress for Success Rochester a to the next level. It also gives me the opportunity to build a relationship with John Williams, who just happens to be one of the kindest, most generous people.

Find Alyssa on LinkedIn: <https://www.linkedin.com/in/alyssawhitfield>

Website: <https://rochester.dressforsuccess.org>

WELCOME  
NEW MEMBERS!**Betsy Bartle**

Associate Director of Annual Giving at Rochester Regional Health

**Rachel Boucher**

Development Associate at Rochester Philharmonic Orchestra

**Reuben Burch**

Financial Advisor at Friends & Foundation of Rochester Public Library

**Jacquelynn Crego**

Director of Development at Ronald McDonald House Charities of Rochester

**Holly Dutcher**

Interim Director at Cure Childhood Cancer Association

**Tracey Lewis**

Community Development at Big Brother Big Sisters of Greater Rochester

**Kelly Palmer**

Special Events Coordinator at Pluta Cancer Center Foundation

**Leona Rossi**

Development Assistant at St. John's Foundation

**Juliana Stefani**

Foodlink

**Alyce Van Patten**

Office Manager & Program Coordinator at Resolve of Greater Rochester

**Alyssa Whitfield**

Founder of Dress for Success Rochester

**Nancy Willer**

Penfield Ecumenical Food Shelf

NATIONAL PHILANTHROPY DAY LUNCHEON  
AWARD NOMINATION DEADLINE

Do you want to nominate someone to receive an award for excellence in philanthropy at this year's National Philanthropy Day Luncheon? The deadline is Friday, July 15, 2016. Nominations are open May through July, so stay tuned for more information on how to make a nomination!

**NPD2016**  
**SAVETHEDATE**  
**NOVEMBER 4**

# FIFTY SHADES OF GRAY:

## A DEVELOPMENT OFFICER'S THOUGHTS ON DONOR RELATIONS

*D. Todd Gray, Senior Vice President of Philanthropy &  
Chief Development Officer at YMCA of Greater Rochester*  
Find Todd on LinkedIn: <https://www.linkedin.com/in/todd-gray-21204010>



I hope you weren't misled by the title. This won't be an article where I share my thoughts on dominating, whipping, or disciplining donors. I'll only share my views about that if you buy me a drink! What I'd like to share is my perspective about how frequently, as development professionals, we may fail to build meaningful relationships with our

donors. Especially over the last few years, I've realized there are many parallels about courting a donor that are similar to how many of us might approach dating a romantic partner.

### The First Date

On any first date you try to learn about the other person – unless you're a narcissist. We want to make a good impression and we're certainly on our best behavior. When we apply this to a first date with a donor, we often let our own agenda disrupt a perfectly lovely encounter. So frequently, our goal is to meet someone, tell them why their philanthropic goals align with our organization and walk away with a donation – all on the first date. Isn't this the equivalent of asking someone to go home with you and stay over? While it might occur in your romantic life – I'm not judging – most donors I've met want to be wooed with a little more finesse. I have learned that investing the time to understand a donor and his or her philanthropic desires can lead to a longer and more rewarding relationship in the months and years ahead. I recommend one simple goal for the first date – get to know what they want, understand his or her needs and be a good listener. Leave them wanting more and they'll be eager to see you again.

### Dating

Assuming you and your donor didn't run off to Vegas and tie the knot on the first date, the excitement of dating begins. I'm sure all of us can remember the anticipation and anxiety that accompanied our second or third dates that led to love. What stirred those feelings within us was the opportunity to share future experiences together. What do you love about your organization and how can you tangibly share it with a donor? When you take a donor to visit a program, ask them to participate in an activity, or introduce them to a participant or someone who benefits from the organization, they will understand firsthand what you treasure about the organization. Don't be afraid to share your personal passion for the organization. It's a well-known fact that people bond when they laugh, cry or

share an emotional experience. The stoic development professional may lead a lonely existence if he or she can't shed a tear with a donor about a life transformed, or laugh at the silliness of participating in a program activity we thought we were too old to enjoy. As you date, you also may find that your donor doesn't enjoy everything about your organization. But, you may also discover that there's one particular program your donor cares about very deeply. This may translate to a larger gift focused in one area, instead of a smaller, more general gift he or she may have given. Before you think about asking your donor for a commitment, make sure you've taken the time to date them and experience, together, what's most exciting about your organization's contribution to the community.

### A Committed Relationship

Dating inevitably leads to someone starting a conversation about commitment. Unlike a romantic encounter, most often there's only one person in philanthropy who's going to initiate this conversation – you, the development professional. You'll notice I didn't specify an acceptable duration for dating. We all know stories of love at first sight, and also stories of love that grew over time. That's the beauty of dating and getting to know someone. You'll know when the time is right to ask that special someone – your donor – to commit. And, the conversation about a commitment will be different than it might have been on the first date. Just like a marriage proposal, you will ask for a pledge by referencing the good times you've shared, the joint goals you have for the future and the transformational work a gift of specific amount (equal to the price of a nice engagement ring) can make for the organization.

Once you're committed, just like any relationship, it takes work. You don't want your rapport with a donor to become stale or stagnate – just like a romance. Remind them of the special people

*Continued  
next page*



## SHADES OF GRAY *Continued from previous page*

in their life – your participants – with handprints from the kids, a phone call or a card on their birthday. Over the course of the year don't forget to set aside time for those special dates and continue introducing them to new people whose lives have been transformed by their support.

Now, think about the next annual pledge as an anniversary of your relationship. During our anniversaries with a special someone we celebrate the accomplishments, joys and sorrows and look to the future. We also renew our commitment to one another – even asking for a deeper engagement by requesting an increased contribution.

Admittedly, there are many times I've taken advantage of that "easy" donor on a first date. I've walked away from coffee or lunch with a pledge and sent a thank you note for the encounter. Then I call them a year later, after minimal stewardship, and with a noticeable swagger in my voice I get a less than fulfilling gift for the same amount as the previous year.

Be adventurous, push your boundaries and explore your own shades of donor relations within your organization. As I have discovered the pleasure of dating donors – only for purposes of cultivation and stewardship – I've experienced the personal and professional reward it brings me to see the deeper engagement and understanding donors have about truly transformational impacts made with their philanthropic gifts. ☺

## Upcoming Events

*Wednesday, April 13*

A Free Seminar from AFPGV: ETHIE Award Process and Tips from Last Year's Winner (see sidebar to right for details)

*Wednesday, April 13*

Young Professionals Networking Group  
Happy Hour Networking at 5:30 p.m. at Swiftwater Brewing Co.  
RSVP online: <http://whoozin.com/CK7-3WU-C74E>

*Thursday, April 14 & Friday, April 15*

CFRE Review Course at St. John's Brickstone Village Square,  
1325 Elmwood Ave, Rochester, NY 14620

*Thursday, April 28*

AFPVG Regional Conference at RIT Inn & Conference Center

*Friday, May 13*

Young Professionals Networking Group  
Pizza & Professionals at 12 pm at Napa Wood Fired Pizza in Perinton  
RSVP online: <http://whoozin.com/JVG-VYH-XNPD>

*Wednesday, May 25*

APRGV Member Meet & Greet, 5:30 – Location TBD

*Thursday, May 26*

AFP Webinar at UR Seminar Room: How to Make a Successful Call on a Major Donor Prospect

To see the full listing of the year's events, please visit [www.afpgv.org](http://www.afpgv.org). ☺

## APRIL LUNCHEON:

### *A Free Seminar from AFPGV: ETHIE Award Process and Tips from Last Year's Winner.*

**Wednesday, April 13**

11:45 a.m. – Registration & Networking  
12:00 - 1:00 p.m. – Program  
at the Pieters Family Life Center  
1025 Commons Way  
Rochester, NY 14623

Whether the goal is to receive an ETHIE or to continually identify better ways to do business and add value to your company, completing the ETHIE entry process is a company-building experience. Hear from Marisa Geitner, president & CEO of Heritage Christian Services (HCS), and Marketta Bakke, associate director of communications, on their application process for Rochester Area Business Ethics Foundation ETHIE Award. The ETHIE Award recognizes businesses and organizations that are doing the right thing. Each September, the Rochester business community gathers at the annual ETHIE Award Ceremony, where finalists and recipients are celebrated and rewarded for their high standards of ethics.

**This is a free event!  
Bring your own lunch**

**Registration deadline April 11**

For more information:  
<http://bit.ly/22IHpYC>



## PEARLS FROM THE PROS

Pearls from the Pros is based on the idea that there's always something to glean from every professional development program. In honor of Dan Meyers' commitment to mentoring the next generation of fundraisers, we thought it would be fun to ask former Meyers Scholarship recipients the best advice they ever received from their mentors.

The Meyers Scholarship covers the annual registration fee for the AFPGV Regional Conference and was established to honor Dan Meyers contributions to the fundraising profession.

*"Know your audience."*

– Julie Murawski, Development Director at Lifespan of Greater Rochester

*"Under promise and over deliver."*

– Lauren Frank, Senior Director of Philanthropic Services at Rochester Area Community Foundation

*"Never be afraid to fail. Nobody counts your failures but they definitely count your successes. Keep pressing on."*

– Cathie Wright, CFRE, Senior Director of Development and Donor Relations at Lollypop Farm

*"One of the best pieces of advice I received early in my career was 'Never apologize or feel embarrassed to ask for a gift of money for your organization.' For one thing, people understand it's your job. For another, if you truly believe in your cause, asking for support will come naturally."*

– Anne McKenna, Director of Development and Communications at St. Joseph's Neighborhood Center

*"Don't be afraid to ask for opinions or help from others. As fundraisers, we are always looking to impress but I find it useful to seek out constructive criticism from fellow fundraisers (at my workplace, locally, or from other like-minded organizations around the country). It's a great way to break the ice and seasoned fundraisers want to talk to you."*

– Sami Sheehan, Individual Giving Manager at Lollypop Farm



"Whether it's through programming, events, or networking AFPGV has positively impacted all of our lives. **Pay it forward today with a gift the "Be the Cause" campaign.** Your support strengthens the future of fundraising in the Greater Rochester area."

<http://www.afpgv.org/be-the-cause>

## Chapter Leadership

### OFFICERS

*President:* Anne McKenna, CFRE

*Immediate Past President:*  
Melanie Barnas-Simmons

*Treasurer and Diversity Chair:*  
Gretchen Wood, CFRE

*Secretary and Webinars Chair:* Jillian Carter

*VP of Marketing:* Jared Longmore

*VP of Membership:* Sarah Goldstein Post

*VP of Professional Advancement:*  
Michael Crisona, MS

### BOARD OF DIRECTORS

*Membership Chair:* Bonnie Butkas

*Board Member and Senior Advancement  
Professionals Networking Group Facilitator:*  
Melinda Goldberg

*Education Committee Chair:* Becky Herman

*Be The Cause Campaign Chair:*  
Karen Humbert

*Board Member:* Terra M Keller

*2016 Regional Conference Chair:* Tracy Kroft

*Communications Committee Chair and Young  
Professionals Networking Group Co-Facilitator:*  
Emily Marullo

*Fundamentals of Fundraising Chair and  
Scholarship Chair:* Julie Murawski

*Ethics Chair:* Marlisa Post

*Government Relations Chair:* Marc Smith

### OTHER POSITIONS (NON-BOARD)

*Social Media Chair:* Lauren Bevacqua

*2016 National Philanthropy Day Chair:*  
Whitney Brice

*CFRE Chair:* Tammy Cohen, CFRE

*Capital Campaigns Networking Group Facilitator:*  
Karen Higman

*Solo Shops Networking Group Facilitator:*  
Krystyna Staub

*Awards Chair:* Tracy Schleyer, CFRE

*Young Professionals Networking Group  
Co-Facilitator:* Danielle Abramson Swartz

*Chapter Administrator:*  
Brenda Thornton