

PRESIDENT'S MESSAGE

There is much to celebrate every summer: Rochester's many events and festivals, our friends' weddings and graduations, and those sweet, lingering summer evenings. While many of us may be working on events such as runs, walks and golf tournaments, we can also look forward to a great celebration of our work that is coming this fall. On November 3, AFPGV will celebrate National Philanthropy Day. Do you know a remarkable volunteer, donor, family, youth group, small business, corporation, foundation or fundraising professional that you would like to celebrate and honor? If so, consider nominating them for one of these significant awards. **Please visit www.afpgv.org to review the criteria and to cast your nomination by July 28.**



Over the years, I have found it a great privilege to be a part of peoples' philanthropy; to connect those with caring hearts and hands to a means of deep and meaningful support. Thus, National Philanthropy Day is an extraordinary way to highlight those whose worthy and charitable efforts make our jobs meaningful, and who help our community to thrive in so many wonderful ways.

AFPGV offers many terrific programs, webinars and social gatherings all year long, but each spring, the AFPGV Regional Conference is offered, and I wish to thank and celebrate all those who made "Making Fundraising Magic" a very successful event for our chapter. The conference, held at the Holiday Inn Downtown on May 9, welcomed more than 170 guests who enjoyed three humorous and informative sessions, presented by national speakers Wayne Olson and Jeff Wilklow. The event was also generously sponsored by Mailstar, Inc., Rochester Regional Health, the University of Rochester, and twenty additional sponsors, exhibitors and advertisers. Member surveys noted that the conference was one of our best. My deepest thanks to chairperson Kristin Cook and committee members Danielle Abramson Schwartz, Wayne Bulling, Michael Crisona, Melinda Goldberg, Tracy Kroft, Julie Murawski, and Jamie Rada. A special thanks to Brenda Thornton, Chapter Administrator, who makes certain that all of our events are smooth and something to celebrate!

I hope to see you at an upcoming program or social event. My best wishes for your continued success, and that your remaining summer weeks are enjoyable ones.

Sincerely,



Anne McKenna, CFRE
Executive Director, St. John's Foundation

Upcoming Events

Wednesday, August 9, 2017
**AFPGV Special Event: Delving Deeper into
Difficult Major Gift Donor Situations**
Happy Hour at the Distillery

Wednesday, August 23, 2017
AFPGV Young Professionals Networking Group
Lunch at Leo's Bakery & Deli

Wednesday, September 6, 2017
AFPGV Small Shops Networking Group
Brown Bag Lunch at United Way

Thursday, September 14, 2017
AFPGV Breakfast Program at Locust Hill
Topic: Advanced Grant Seeking

For more events, visit afpgv.org/upcoming-events

Welcome New Members!

Johnson Bowles — V.P. Advancement,
SUNY College at Geneseo

Lauren Deutsch Esquire, JD —
Executive Director, Healthy Baby Network

Marta Driscoll — Program Coordinator,
Causewave Community Partners

Taylor Freitas, MA — Development Manager,
St. John's

Katherine Mannion — Advancement Services,
Aquinas Institute

Diana Palotas — Director of Advancement,
Trinity Montessori School

Rebecca L. Steiner — Associate Director of
Development, Uncommon Schools

Matthew Zager — Assistant Director of Development,
Monroe Community College Foundation

Association of Fundraising Professionals
— Genesee Valley Chapter

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Chapter & Verse newsletter

Meghan Mueller, Editor
Wayne Bulling, Graphic Design

STATE OF AFFAIRS: *Current Legislation Affecting Nonprofits*

by Jared Longmore

Like him or hate him – there usually isn't much middle ground – there's no denying that President Donald Trump has been a disruptor. In his first few months on the job he nominated Neil Gorsuch to the Supreme Court, attempted to instate his travel ban (immediately challenged in the courts), and withdrew America from the Paris Climate Agreement. Changes to tax reform, healthcare, and immigration loom on the horizon.

Lost in this shuffle are important implications for nonprofit organizations and, more specifically, for fundraising professionals. The following are a few things to watch out for in the months to come:

1. Changes to the standard deduction and its implications for charitable giving.

In the current tax system, Americans can choose to itemize their deductions or claim the standard deduction, which is \$6,300 for individuals and \$12,600 for married couples filing together.

The White House and Treasury Secretary, Steven Mnuchin, have proposed simplifying the tax code, which they argue is confusing and burdensome to individuals. One way they have proposed doing this is raising the standard deduction to \$15,000 for individuals and \$30,000 for families.

This would encourage more Americans to claim the standard deduction. According to the Urban-Brookings Tax Policy Center, a nonpartisan think tank, more than half of the 45 million people who currently itemize would claim the standard deduction under this new policy.

Undoubtedly, this would make filing easier, but research done by the Indiana University Lilly Family School of Philanthropy suggests it would have a substantially negative impact on charitable giving. Their research shows it could decrease charitable giving by as much as \$13.1 billion.

The Charitable Giving Coalition, of which AFP is a member, is encouraging Congress to consider an "above the line" or universal deduction. In other words, anyone – regardless of whether they itemize or take the standard deduction – could utilize the charitable deduction.

2. Loosening restrictions that allow nonprofits and religious organizations to engage in lobbying activities.

You may have heard talk about the Johnson Amendment. Written into the tax code in 1954, it disallows any 501(c)(3) organization – whether religious or charitable – from endorsing or opposing political candidates. Ostensibly, it's a law that prohibits non-taxpaying organizations from lobbying activities.

Republicans have long argued that the Johnson amendment limits the free speech of religious groups, and earlier this year President Trump signed an executive order called "Promoting Free Speech and Religious Liberty" weakening the Johnson Amendment. It

should be noted that an executive order can't change a law – that process must take place in Congress. Instead, it instructs the Treasury Department, as an arm of the Executive Branch, to not enforce the law.

In short, while this might be liberating for churches, it could be devastating for the nonprofit realm. Arguing that politics and partisanship have no place in the philanthropic sector, AFP

released the following statement on the Johnson Amendment:

The foundation of philanthropy – what the charitable sector does at its core—is to bring people together to advance causes and create change. People who believe in an issue—regardless of their creed, background, nationality, political leanings, or any other factor—unite to support a cause through giving, volunteering and other types of engagement. It doesn't matter who you are as long as you support the issue and the cause.

Hunger, homelessness, medical research – these are not partisan issues. We hope that Congress will not repeal the Johnson Amendment.

3. A significant reduction in federal grant making.

President Trump's 2018 budget proposal requested massive reductions in spending for the arts, humanities, science, and medical research.

As covered by *Washington Post* reporters Joel Achenbach and Lena Sun, the National Cancer Institute would be hit with a

Lost in this shuffle are important implications for nonprofit organizations and, more specifically, for fundraising professionals.

STATE OF AFFAIRS (CONTINUED)

\$1 billion cut compared to its 2017 budget. The National Heart, Lung and Blood Institute would see a \$575 million cut, and the National Institute of Allergy and Infectious Diseases would see a reduction of \$838 million. The administration would cut the overall National Institutes of Health budget from \$31.8 billion to \$26 billion.

The National Science Foundation, which dispenses grants to a variety of scientific research endeavors, would be trimmed \$776 million, an 11 percent cut.

More dramatically the so-called “skinny” budget would eliminate the National Endowment for the Arts, National Endowment for the Humanities, and the Corporation for Public Broadcasting – the funding stream for public radio and television.

It’s important to note that Congress will ultimately pass the budget and they rebuked many of the cuts in the initial budget. But, undoubtedly, nonprofits relying on these revenue streams will be forced to turn to private philanthropy or other funding streams to continue projects.

Other foreign leaders have also mocked the cuts. French President

Macron even sent out a video message reassuring French scientists that their budgets would be reinforced and inviting American scientists and researchers to emigrate.

4. Eliminating debt forgiveness for nonprofit employees.

This one won’t affect nonprofits directly, but it will definitely affect many of their employees.

In May 2017, it was reported that the Department of Education under Secretary Betsy DeVos was looking into ending the Public Service Loan Forgiveness Program as a part of its austerity measures.

This program was created in 2007 to provide loan forgiveness for individuals who work in government and non-profit organizations. The premise was simple – encourage people to go into public service by eliminating the financial concern of repaying federal student loans. Individuals would enroll into a qualifying income-based plan and make 120 on-time, monthly payments. After those 10 years are up the remainder of their federal debt would be forgiven.

Neither Secretary DeVos nor President Trump have explained what this might mean for individuals already enrolled in the plan. 

PEARL FROM A PRO: The Board’s Role in Philanthropy

by Cynthia Woolbright, President, The Woolbright Group



“We ask members to give or get.”

“We don’t state specifics in giving.”

“Please allow me to state, it’s both!”

“Board members must be fully in.”

As a governing board with fiduciary responsibilities, it is imperative that board members both “give” at an annual leadership level as well as “get” philanthropic support through their own participation in fundraising.

Along with responsibilities of care, obedience and loyalty, members also must be expected to faithfully execute their fiduciary accountability. In this role, the trustees must exercise due diligence in

overseeing that the organization is well-managed and that its financial situation remains sound.

In this latter role, it is increasingly important that members make their own annual, leadership gift as well as assist in raising philanthropic support. Along with other written expectations provided to potential members, giving and getting must be well-understood before asking someone to join. Here, individuals can learn the various roles that they can play in securing philanthropic support. Additionally, they can be made aware of the impact of the board’s collective giving.

For an organization or institution to be successful, its board members must demonstrate their own commitment, credibility, transparency and accountability in serving the organization and broader community. It’s more than participation, it’s leadership.

For those served, they deserve nothing less than the highest degree of dedication of time, talent and treasure from their board. 



MEMBER SPOTLIGHT

Joshua Stapf

Development Director,
Gay Alliance of Rochester

How did you find yourself working in fundraising and what brought you to your position at the Gay Alliance?

I originally started out in science, but never felt right and started exploring different career paths. I found passion and enjoyment in the arts, but I was not able to execute great pieces of work. When I found the Museum Studies program at RIT, I discovered I could be a part of the arts by helping raise money for them. As I began looking for a position that was at an organization that fought for a cause I supported, I came across the Gay Alliance and I joined them as their Development Director.

Why did you become a member of AFP?

I became an AFP member for the resources, education opportunities, and to network and meet others in the field.

What is your favorite part about working in fundraising?

My favorite part of working in fundraising is seeing the impact of my work and the change I am helping create. The Gay Alliance recently held a Youth Dance and to see the smiles and all the fun the kids had really makes you feel that you are having an impact.

What is your favorite non-fundraising thing about Rochester?

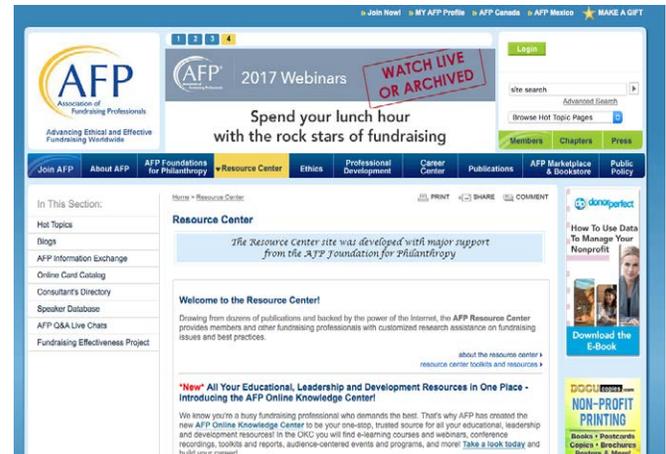
My favorite non-fundraising thing about Rochester is taking my dog for walks through the different neighborhoods and seeing the different architecture and history of the neighborhoods.

What is the best piece of advice you've ever received?

The best piece of advice I have ever received I would say had to come from my grandmother a couple months before she passed away. That advice was, no matter where you are or what has happened, just know that tomorrow is a new opportunity to make a change.

Find Joshua on LinkedIn:

<https://www.linkedin.com/in/joshua-stapf-3b289721/>



RESOURCE REVIEW: Personal Researcher? Yes Please!

by Emily Marullo, CFRE

I have a confession. I have never used the resources on the AFP Headquarters website. My gut says I'm not the only one. Read along for my first 'Resource Review!'

Resource: The Resource Center offers a concierge research service. Simply send in your request for information by email to resctr@afpnet.org. A researcher will query and prepare the best customized response within seven business days.

First Reaction: That's too good to be true.

My Request: My organization wants to formalize our stewardship efforts. I am seeking examples of donor stewardship plans, along with tips on how to build a stewardship program in a medium-size nonprofit.

Tick Tock: My response came in two short hours. This service is millennial proof!

Quality Check: The information I received dwindled down an encyclopedia of online resources into five great links. Of the five there was: a downloadable template to create a stewardship plan, a college foundation's formal stewardship plan, a mid-size nonprofits chart of tracking donor "touches," an article on what conversations you should be having within your organization to pilot customized stewardship plans and a generalized blog post. It was the perfect balance of variety without an overload of information.

One-Fundraiser-To-Another: Your membership covers this service. If you've been putting a new idea off that requires research, send in your request! The quick response and helpful information will motivate you to tackle new projects! 🙌

Find the Resource Center at

<http://www.afpnet.org/ResourceCenter>

MASTERING POSITIVITY AT THE INTERNATIONAL CONFERENCE

by *Emily Marullo, CFRE*

My first session as a Chamberlain Scholar at the International Conference was 'What's On Your Mind? How Our Thinking Impacts Our Giving, Living, and Results,' lead by fundraising veterans and certified life coaches Marcy Heim, Lori Jacobwith and Gail Perry.

Gail started by reframing the lens of our work through the words of Maya Angelou, "*You want to compose a good world – it is an honorable and noble profession.*" There was a zen-like moment of quieting the chatter, buzzwords, hashtags of the conference that made this approach to our work feel powerful.

Marcy, Lori and Gail shared several tools to master positivity through conscious action and thought. I want to share the three most memorable and, in my opinion, most impactful on our work.

The Words We Use: Have you discussed "suspects" that you are "qualifying" to be your next best "prospect?" Once you "follow up" with them through a "strategy" you built, you may "move" them up the list to make a large "ask" that you'll eventually "close." Excuse me, are we talking about people like this?! I want to talk about prospective givers, who share values and interests with my organization. I want to stay in touch with them, keep them informed through planned communication that inspires them to accept my

invitation to invest in our organization and become our partner.

INTERNATIONAL
FUNDRAISING
CONFERENCE **SAN FRANCISCO, CA**
APRIL 30 - MAY 2, 2017

Ask the Right Questions:

Instead of asking, "why am I the only one tracking contact reports?" or "why doesn't my committee help with simple fundraising tasks?" Shift your question and shift your outcome. Start by asking, "What's working right now?" Then ask for honest feedback on why something isn't happening the way you think it's intended to happen. This will shut down opportunity for resentment to grow.

Shed the Victim: Taking back your power and your knowledge that you create everything in your life (and everything that isn't in your life), means there is no room to play the victim card. At this point in the session we were asked to finish the statement, "Wouldn't it be wonderful if..." An attendee stood up and said, "Wouldn't it be wonderful if I found a job through this conference." Six hiring managers brought him their business cards!

The bottom line of Marcy, Lori and Gail's message was that you have full control. Dust off your inner Buddha and own your thoughts, actions and results! 

AFP National Outstanding Young Professional Award Winner by *Kayleigh Stampfler, CFRE*



If you are looking for a way to reinvigorate your fundraising spirit, attending an AFP International Conference is just what the doctor ordered. I returned from my recent trip to San Francisco recharged and refreshed in mind and in spirit.

The stimulating educational sessions and plentiful networking opportunities renewed my commitment to our field and sparked new ideas. AFP offered an entire series hosted by self-proclaimed rebels and renegades. The speakers pushed boundaries and thought outside the box. They discussed concepts that are yet to make their way to Rochester. I couldn't wait to get home and share the wealth of knowledge I gathered.

This year's conference was extra special for me as I was honored with an Outstanding Young Professional Fundraiser Award. I was one of five inducted into the inaugural class of rising stars. This accomplishment for me is more than just a bullet on my resume or an entry on my linked-in page. The award gives me platform to discuss our profession and my love of philanthropy with people in the Rochester region and beyond. It adds credibility to my name and also highlights the difference individuals can make even at a younger age. I hope to use my time in the spotlight to inspire other budding philanthropists considering a career in the field.

The best fundraisers I know are the most self-aware and have the best stories. Being young in the field means I have to work more actively at this. A trip across the country to a big city offered a chance at seeing new sites and expanding my horizons. I am so grateful for the time I spent meditating among the redwoods and watching a west coast sunrise. I even wrote a few post cards to extra special donors from Muir Woods. The memories I created during my trip were just as valuable as the takeaways from the education sessions.

If you are on the fence about being a member of AFP or attending a conference, say yes. Surrounding yourself with peers will encourage you to challenge your current paradigm and grow in the field. No matter where you are in your career, you can and should be learning something new every step of the way. Whether the lesson comes from the seasoned professional with decades of fundraising know-how or the young professionals with a fresh perspective or even from a lone redwood staring you back during a meditation session in the forest, you will be glad you said yes. AFP provides the gateway to enhanced creativity, inspired innovation, lifelong friendships and boundless personal growth. I hope you will join me at the next conference or event. I will be the blonde gal with her business cards out looking to make new friends. Cheers! 

Dear Ethical Ethel:

I'm writing a solicitation letter and want to tell the story of a person my organization has served. But I feel like I could highlight the good things we do more if instead of an actual client, I create a composite person made up of several examples of people with whom we have worked and present this made-up person as a client. Plus it would address privacy concerns that some of our staff has. Would this be ethical?

Fictitious in Fairport

Dearest Fictitious,

This is an excellent question! In fact, in 2014 the media and the public cried foul when a non-profit ran a national direct mail campaign with just such a made-up subject. People felt betrayed when they learned that the child who was the focus of the letter did not exist.

But is this a breach of ethics? The AFP standard in question is Standard No. 12: "Members shall take care to ensure that all solicitation materials are accurate and correctly reflect their organization's mission and use of solicited funds." However, you are not talking about how you present your mission or your use of donor dollars. You are hoping to tell

a story about the good work your organization does that will move people to give.

Since these are murky waters, I decided to call in some experts. First I reached out to Rebecca Knight, Director of Board Governance and Ethics Management at AFP, who said that this scenario would not run afoul of AFP Standards. She noted that there can be many valid reasons that a non-profit would need to shield personal data and create a figure that protects client anonymity. Then I spoke with Tim Thomas of Tim Thomas & Associates, a direct mail expert who feels that this practice can be quite effective if done with care. "I'd advise using cue words to subtly hint that this is a composite person: 'as an example' or 'x's story is typical of our clients.' With any fundraising letter, a strong story is the most important part and a composite subject can really help you tell your story."

So, Fictitious, you may proceed with a clear conscience. But if one of your donors asks about the subject of your letter, be ready to answer honestly. You can use it as an opportunity to reinforce all of the good that your organization does!

Happy fundraising!

Ethical Ethel



P.S. Have a question for Ethical Ethel? Email it to ethics@afpgv.org or submit online at www.afpgv.org/chapter-a-verse-newsletter. Your question may be used in the AFPGV newsletter or in social media. However, all identifying information will be removed.

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