

PRESIDENT'S MESSAGE

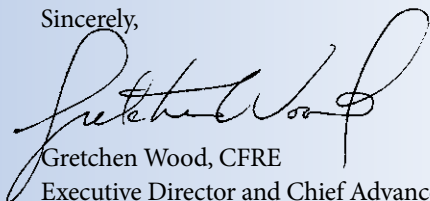
It is with great enthusiasm that I write my first article as President of the Association of Fundraising Professionals Genesee Valley Chapter (AFPGV). Like most people of my age (no, I am not sharing that here) fundraising was not a profession on my radar. My exposure to fundraising as a career occurred when I worked at an ad agency and volunteered at the Humane Society at Lollypop Farm. I have Alice Calabrese to thank for roping me in. Working with Alice, Gillian and the entire Lollypop Gang was amazing and a great education in how to run a progressive nonprofit organization.



For an accidental fundraiser, AFP was invaluable. The programs were informative, the website a treasure trove of materials and the networking was outstanding. This all remains true today. The topics have evolved over the years (think social media) but the basic tenets of the fundraising profession that AFP focuses on are the same—ethical, effective fundraising practices that will benefit our entire community. I have learned so much from my engagement with AFP and hope that holds true for all of you.

One of the most valuable things I have learned is that the more involved I am with AFP, the more I gain from it. Working on committees populated by the most talented fundraisers in our community has been extraordinary and is an educational opportunity that should not be missed. In our own organizations we recognize that the volunteers who are the most engaged are our rock stars. The same is true at AFP and I hope you will fully join the band. Get involved, volunteer for a committee, recommend a speaker or topic, serve on the board. Add your voice to our lively community of enthusiastic fans of philanthropy. I'm confident you will be glad you did.

Sincerely,



Gretchen Wood, CFRE
Executive Director and Chief Advancement Officer
Monroe Community College Foundation

Upcoming Events

Tuesday, February 6, 2018

AFPGV Deep Dive: Third-Party Events
Happy Hour at Living Roots Wine & Co.

Wednesday, February 7, 2018

AFPGV Small Shops Networking Group
Brown Bag Lunch at United Way

Tuesday, March 6, 2018

AFPGV Luncheon Program:
Ethics – It's Everyone's Business
Locust Hill Country Club

Friday, March 16, 2018

AFPGV Advancement Answers Networking Group Breakfast Meeting
Panera Bread, Brighton 12 Corners

Thursday & Friday, March 22-23, 2018

AFP CFRE Refresher Course
St. Ann's Community

Wednesday, May 2, 2018

AFPGV Regional Conference:
"Invest in Joy"
Holiday Inn – Downtown Rochester

To see a full listing of AFPGV events, visit
www.afpgv.org/upcoming-events

SAVE THE DATE:
AFPGV Regional Conference
Wednesday, May 2, 2018
Holiday Inn Downtown
"Invest in Joy"

Association of Fundraising Professionals
– Genesee Valley Chapter
PO Box 425, Spencerport, NY 14559
tel: 585-586-7810 | fax: 888-366-9196
info@afpgv.org | www.afpgv.org
@afpgv | www.facebook.com/afpgv

Chapter & Verse newsletter
Meghan Mueller, Editor
Wayne Bulling, Graphic Design

STATE OF AFFAIRS:

Current Legislation Affecting Nonprofits

by Taylor Freitas



The GOP tax reform bill, The Tax Cuts and Jobs Act (TCJA), was signed into law on December 22, 2017. Republicans promise the new tax law will benefit the middle class and corporations, while Democrats are wary of its potential effect on lower-income taxpayers and on the nation's fiscal health. Lost in this debate are the potentially devastating ramifications for nonprofits and the philanthropic sector.

The TCJA and its implications for charitable giving

The Tax Cuts and Jobs Act makes four major changes that will likely discourage charitable giving: (1) it lowers individual income tax rates, thus reducing the value of all tax donations; (2) it caps the state and local tax deduction at \$10,000, and (3) increases the standard deduction to \$12,000 for individuals and to \$24,000 for couples—both of which will result in far less itemizers; and (4) it roughly doubles the estate tax exemption to \$11 million for individuals and to \$22 million for couples, discouraging tax-motivated bequests by some very wealthy households.

With the doubling of the standard deduction under the TCJA, the number of Americans who itemize their taxes will drop by 30 million (from 33 percent of all taxpayers to just five percent), according to the Congressional Joint Committee on Taxation. Since more Americans will do better on their taxes by taking the newly increased standard deduction—as opposed to itemizing their deductions—the tax incentive for those taxpayers to make charitable gifts will disappear.

Research shows that this change will result in a decline in giving between \$13-\$20 billion annually (between 4-6.5% of all contributions), according to separate studies from the Independent Sector and the Lilly Family School of Philanthropy, and the Tax Policy Center. “I’m very concerned that these estimates are just the tip of the iceberg when it comes to the drop in giving,” said Mike Geiger, president and CEO of AFP.

To place this into context, Giving USA estimated that, between 2015 and 2016, total giving rose from \$379.89 billion to \$390.05 billion. A drop in giving by \$13 billion under the new bill would offset the \$11 billion growth in giving that occurred between 2015 and 2016, while a drop of \$20 billion would be a major setback in total giving. This is especially troubling given our current political reality, in which government budgets continue to shrink, especially for social services and other programs that benefit our most disadvantaged communities.

AFP's role in tax policy and the fight for a universal charitable deduction

The Association of Fundraising Professionals (AFP), working alongside the Charitable Giving Coalition (CGC), has been extremely active on the tax reform front. Throughout the past year, AFP met with members of Congress, most notably Rep. Mark Walker (R-N.C.) and Senators James Lankford (R-Okla.), Debbie Stabenow (D-Mich.), and Ron Wyden (D-Ore.), along with academics and tax policy experts in an effort to discuss legislative proposals to encourage giving. “During the last couple of weeks, we had hundreds of calls and meetings and emails with Congressional staff to create a universal charitable deduction amendment,” wrote Geiger in a January blog post to AFP members.

A universal charitable deduction would allow all taxpayers to deduct charitable gifts, regardless of whether they take the standard deduction. According to the CGC, this would help offset the loss of \$13 billion in charitable giving due to the doubling of the standard deduction.

Thanks to Congressman Mark Walker and Senator James Lankford, legislation was introduced at the end of 2017 to extend a charitable giving incentive to non-itemizer taxpayers. Known as The Universal Charitable Giving Act, this legislation would provide taxpayers who do not itemize their tax returns a deduction for charitable contributions of up to one-third the amount of the standard deduction.

Unfortunately, this legislation was not included in the final version of the Republican tax reform bill. Jason Lee, chief advocacy and strategy officer for AFP, was disappointed that the universal charitable deduction was absent from the bill. According to Lee, “a universal charitable deduction would have simplified the tax code and promoted fairness, allowing anyone to take a charitable deduction, whether they itemize or take a standard deduction.”

Still, the introduction of Congressman Walker's and Senator Lankford's joint-legislation will hopefully spur future discussion among congressional leaders around the importance of a universal charitable deduction. AFP will also continue to fight for the inclusion of the universal charitable deduction provision. “We are disappointed but we're not going to stop lobbying on this issue on behalf of our members and charities across the U.S.,” said Geiger.

Continued next page

STATE OF AFFAIRS (CONTINUED)

The Johnson Amendment and other provisions

The repeal of the Johnson Amendment, which was included in the House version of the bill but not the Senate version, was ultimately removed from the final bill.

The Johnson Amendment prohibits charities from directly or indirectly attempting to influence an election or defeat of any candidate for public office. AFP firmly opposed the repeal as it would allow charities to become pass-throughs for political dollars (i.e., lobbying organizations), while donors get a charitable deduction.

The TCJA does make two positive changes for taxpayers who continue to itemize. First, it increases the adjusted gross income (AGI) limitation for cash gifts from 50 percent to 60 percent. Second, it eliminates the Pease Amendment, which limited the value of certain itemized deductions for higher income taxpayers. However, these changes will not significantly counteract the overall effect that the TCJA will have on thousands of charities and millions of taxpayers.

Moving forward in 2018

People do not give because of tax policy; this much is clear. However, a 2014 global study conducted by Nexus, McDermott Will & Emery LLP, along with the Charities Aid Foundation, found a correlation between tax incentives and the amount and frequency of donations. Removing the incentive to give from 30 million

taxpayers will almost certainly lead to a sizeable drop in giving. Despite this, there's reason to think that 2018 will continue to show a rise in "rapid-response" giving.

It's no coincidence that President Trump's election and his administration's subsequent policies have stirred up civil society and galvanized a new wave of philanthropists. After his first 100 days in office, Charity Navigator reported a massive increase in donations to progressive groups, including the ACLU (up 8,000%), Southern Poverty Law Center (up 1,400%), and Planned Parenthood (up 1,000%). Additionally, major donors like tech giant Jeff Bezos, who has come forward to challenge the administration's immigration policy, and billionaire Michael Bloomberg, who recently created the Global Covenant of Mayors for Climate & Energy, have also responded to the administration's agenda.

Ultimately, people will continue to give to causes in which they believe. While donors need to know the challenges that nonprofits face, it's important that nonprofits not overwhelm donors with negativity. Let's continue to inspire donors with stories of the positive impact our organizations have on our communities, and reassure them that every gift, whether large or small, makes a difference.

One last thought from AFP CEO Mike Geiger: "Our goal—to build relationships, create connections and inspire people to get involved—has not changed in the slightest." 

CFRE Refresher Course

Are you thinking about earning your CFRE certification this year? Prepare for the exam with local fundraising experts at the **AFP CFRE Refresher Course**.

WHEN: Thursday, March 22 and Friday, March 23 from 8:30AM-5:00PM (lunch is included!)

WHERE: St. Ann's Community (Life & Learning Center)
1500 Portland Avenue, Rochester, NY 14621

COST: AFP Members: \$390, Non-Members: \$490

REGISTER BY: February 28, 2018

SCHOLARSHIPS: The Jill Pranger Scholarship Fund for CFRE Certification provides 50% of the course registration fee — *apply today!* Applications are due Tuesday, February 20 at NOON. *The scholarship does not cover any portion of the exam fees.*

2017 AFPGV SCHOLARSHIP WINNERS

Please congratulate the following AFPGV members for winning 2017 AFPGV Scholarships:

Taylor Freitas – *Chamberlain Scholarship for the 2018 AFP International Conference*

Mia Hodgins – *Williams Diversity Scholarship for AFP Membership*
Sam Corrigan – *Karen M. Gaffney Scholarship for AFP Membership*

Scholarships are meant to provide opportunities to fundraisers in our community and ensure that AFP's programs are accessible to motivated individuals who want to continue their education. For more information, please visit www.afpgv.org/scholarships.



MEMBER SPOTLIGHT

Lauren Bevacqua

Community Development Manager
American Cancer Society

How did you find yourself working in fundraising - was it always something you wanted to do?

I sort of evolved into a fundraiser from my work in programming at my first job at a nonprofit organization in Buffalo. The program I was overseeing developed a fundraising event, and that was really my first jump into the fundraising world. It was not something I always wanted to do – my bachelor's degree is in community health administration and I really saw myself sticking with nonprofit programming and outreach – but once I started fundraising and special events it was a great fit for me and my skill set.

What is your best piece of advice to someone who currently works, or would like to work in fundraising event planning?

Hmmm, that's a tough question. Everyone's fundraising portfolios and experiences are so diverse! I guess I'd have to go with don't be afraid to try something new. It's 2018. Fresh ideas and initiatives are always needed, so don't be afraid to dive head first into something that's not been done before. With that though, do your research and see what is already happening that you could transform and innovate. I was recently reminded that the best ideas are stolen (or borrowed), and I think this is especially true in fundraising.

How do you cope with the stressors of event planning?

I rely heavily on my friends when I'm stressed out – both friends in fundraising and friends outside of fundraising. No one can understand certain aspects of my job unless they're in it too so that's when I turn to my fundraising network, then when I need to just take a step back I lean on my friends outside of the field. Nothing beats a quick vent session so you can get something off your chest and push forward.

How did you become involved with AFP?

My boss at my first nonprofit job in Rochester recommended I get involved with AFPGV. She thought the YP Networking Group would be beneficial for me (and it was!!) and encouraged me to get involved with a committee – which has now led to my being elected to the Board!

What three things can't you live without?

My dog, my family, and carbs :)

If you could trade places with someone for a week, real or fictional, who would it be and why?

I would say Lorelei Gilmore – someone who maintains that level of caffeination and love of food is really my type of person.

Find Lauren on [LinkedIn](#).

Welcome New Members!

Ashara J. Baker
Quad A for Kids

Christopher Bensch
Vice President of Collections and
Chief Curator, The Strong

Alesia Bosko
Database Administrator, Our Lady of Mercy
School for Young Women

Carrie Datro
Development Grant Writer,
DEPAUL Properties Inc.

Thomas DeRoller, Jr.
Director of Development,
CDS Wolf Foundation

Kylee Fassier
Donor Engagement and Special Events
Manager, The Strong

Myranda Gillow
Major Gifts Officer, The Strong

Shaun Hakiel
Manager of Annual Funds,
Planned Parenthood

Lisa Hartmann
Events & Community Engagement
Coordinator, Willow Domestic Violence
Center

Barbara J. Hoerner
Director of Foundation Relations,
Development & Alumni Relations,
Rochester Institute of Technology

Cathleen F. Macinnes

Karen M. Ralph
Director of Alumnae Relations, Our Lady of
Mercy School for Young Women

Nathaniel Schreiber

Kate Whitman
Grants and Foundation Manager, The Strong





Thank you, donors!

Each year our chapter participates in the AFP's BE the CAUSE, an annual fundraising campaign that raises dollars that contribute to the value that AFP delivers to its chapters and its members. Each and every day, the important work you do makes an impact on philanthropy around the world. Together, we can empower fundraisers, strengthen communities, and transform the way donors give. Join us and BE the CAUSE today!

**Alpha Society donors give to the AFP Foundation by establishing a fixed monthly gift that is transferred directly from a checking account or credit card. [Click here](#) for more information about the Alpha Society.*

President's Club (\$1,000 - \$1,999)

Mark Peterson, CFRE*
Steven Smith, CFRE*

Silver Ribbon Donor (\$100 - \$249)

Melanie Barnas-Simmons*
Colleen Brade*
Jillian Carter*
Michael Crisona*
Becky Herman, CFRE
Jeffrey Hough*
Terra Keller*
Tracy Kroft*
Jared Longmore*
Emily Marullo, CFRE*
Dan Meyers
Cynthia Pacia*
Marlisa Post*
Sarah Goldstein Post, CFRE*
Gerianne Puskas*
Tracy Schleyer, CFRE
Bradley Schreiber*
Krystyna Staub*
Danielle Abramson Swartz*
Brenda Thornton

Marianne Virgilio, CFRE*
John Williams*
Gretchen Wood, CFRE*

Bronze Ribbon Donor (\$50 - \$99)

Katharine Bassney
Carolyn Bick
Kristin Cook
Carol DeMoulin
Kristin Eklin
Karen Humbert
Anne McKenna, CFRE
Carol O'Neal
Mark Pastorella
Debra Salmon
Diane Shoger
Pamela White

Blue Ribbon Donor (Up to \$49)

Lauren Bevacqua
Whitney Brice
Julie Burke
Leslie Chambers
Megan DeFranco
Lauren Dru Frank

Laura Garrison
Melinda Goldberg
Cynthia Gray
Susan Gurak
Karen Higman
Mia Hodgins
Denise Hubler, CFRE
Carolyn Hunt, CFRE
Chuck Levengood
Karly Marshall
Robyn Miller
Meghan Mueller
Julie Murawski
Vicky Pape
Jamie Rada, CFRE
Rich Redding
Karen Saludo
Karen Shaw
Marc Smith
Kayleigh Stampfler, CFRE
Dawn Stever, CFRE
Susan Sullivan
Alyssa Whitfield
Brian Wirth
Michele Wistner
Leslie Zornow

PEARLS FROM THE PROS

When it comes to your organization's board, how much access is too much access?

From Jamie Beedham-Rada,
Coordinator of Development at
Lifetime Assistance Foundation



"Our Foundation Board is comprised of successful professionals with extremely demanding careers. Their purpose is to provide oversight and support and assist with fundraising and development. Therefore, board reports are kept at a high level, summarizing critical program updates. They don't need, nor do they want to know specific day-to-day operational details. Exceptions are made when more specified information is needed, such as for a board vote on a critical decision. Before asking our board to vote, they are given all pertinent information, often including detailed reports, to assure they have the tools needed to make an informed decision."

From Jared Longmore,
Associate Director of Advancement for
Athletics, University of Rochester



"So long as you aren't stepping on each other's toes, there is no such thing as too much access. If you have a board member willing to dive into the details – particularly for development work – you should embrace their enthusiasm and use their expertise. However, as the development professional it's your job to be the content expert and work with your board member's talents. Like most things in life, it's a balancing act."



This time, Ethel has a question for you, dear readers. While sipping my cup of Earl Grey one December morn, I came across an article in the *New York Times* that gave me pause: “Gifts Tied to Opioid Sales Invite a Question: Should Museums Vet Donors?”

The piece focuses on gifts from the Sackler family, who has donated millions to well-known museums and other cultural institutions. As noted in the article, there are “members of the Sackler clan who can trace part of their fortunes to Purdue Pharma, the privately held company that produces the drug [OxyContin]. In 2007, the parent company of Purdue pleaded guilty to a federal felony charge of misbranding OxyContin with the intent to defraud or mislead. (The Sacklers personally were not accused of wrongdoing.) Now Purdue faces new lawsuits by state authorities as well as another federal investigation.”

This drives the author to ask: to what degree are cultural institutions responsible for vetting every dollar they receive? Can financially strapped arts organizations be picky about a patron’s source of wealth, and if so, where should they draw the line? At a donor who engages in unlawful or unethical behavior? Or whose conduct is at odds with the institution’s goals?

And Ethel asks you the same: Do you consider the source when you receive a donation? Does the origin of your donor’s money matter?

While the AFP Code of Ethics is silent on this matter, some cases seem obvious. For example, a health organization may want to think twice before accepting funding from a tobacco company. But what if you are an environmental advocacy group and your donor’s family made their money in oil? Perhaps consider this: the Nobel Peace Prize was endowed by Alfred Nobel, a Swedish industrialist who made his fortune in part through arms manufacturing. Some Nobel scholars feel that the creation of the Peace Prize was Nobel’s effort to atone for his past. Should the winners of the Peace Prize say “Nah, I’m good” because of the less-than-savory origins of the prize money?

What do you think? How much thought do you give to the source of your donors’ funds? Send Ethel an email and share your thoughts!

Source: Moynihan, Colin. (2017, December 1). Gifts Tied to Opioid Sales Invite a Question: Should Museums Vet Donors? *The New York Times*. Retrieved from www.nytimes.com.

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. ☺

CHAPTER LEADERSHIP

OFFICERS

President: Gretchen Wood, CFRE

Immediate Past President:
Anne McKenna, CFRE

Treasurer: Jillian Carter

Secretary: Whitney Brice

VP of Marketing: Kristin Eklin

VP of Membership: Christyn Sanagursky

VP of Professional Advancement:
Jared Longmore

BOARD OF DIRECTORS

2018 National Philanthropy Day Chair:
Julie Murawski

Government Relations Chair: Tracy Kroft

Be the Cause Campaign Chair:
Danielle Abramson Swartz

Communications Committee Chair:
Lauren Bevacqua

*Senior Advancement Professionals Networking
Group Facilitator:* Melinda Goldberg

Education Committee Chair:
Emily Marullo, CFRE

2018 AFPGV Regional Conference Chair:
Jamie Rada, CFRE

Ethics Chair: Marlisa Post

Deep Dives Chair: Karen Humbert

Scholarship Chair: Sami Sheehan

Membership Chair: Brad Schreiber

Fundamentals of Fundraising Chair:
Gerianna Puskas, MBA, CNPM

Kristin Salter Cook

Diversity Chair: Alyssa Whitfield

OTHER POSITIONS (NON-BOARD)

Awards Chair: Tracy Schleyer, CFRE

Social Media Chair: Karly Marshall

CFRE Chair: Steven Smith, CFRE

Small Shops Networking Group Facilitator:
Krystyna Staub

*Advancement Answers Networking Group
Facilitator:* Karen Higman

*Young Professionals Networking Group
Facilitator and Chapter & Verse
Newsletter Editor:* Meghan Mueller

Chapter Administrator:
Brenda Thornton