



Genesee Valley Chapter

CHAPTER VERSE ONLINE

Donor-Centered Fundraising with Penelope Burk *Join us for a half day of great education!*

Penelope Burk will present her nationally acclaimed, high energy workshop on Donor-Centered Fundraising at a half-day conference, gratefully sponsored by Grizzard, on Wednesday, May 18, 2005 at the RIT Inn and Conference Center.



Donor-Centered Fundraising is a pragmatic and comprehensive approach to fundraising and donor communication that will enable your organization to retain donors longer and move them into higher levels of giving more quickly. Penelope Burk will show participants how to raise more money with less risk while halting donor attrition and increasing major gifts.

Cost for the workshop is \$95 for members and guests (by May 1st), \$105 for members, \$115 for all others (after May 1st) The workshop includes a continental breakfast.

This half-day conference, coupled with a special National Philanthropy Day Celebration on November 15, will replace our full day Great Lakes Regional Conference this year. We will resume hosting the full day conference in May, 2006.

For more information on how to register for Donor-Centered Fundraising with Penelope Burk, please contact the Genesee Valley Chapter at (585) 586-7810. ■

“Penny Burk

challenges fund raisers to think about the donors’ needs first. Her compelling and engaging presentation makes us recognize that some common practices in fund raising are not always “donor friendly.” She is inspiring and well worth a few hours out of our busy day.”

Steven S. Smith, CFRE
Vice President
St. Ann’s Foundation &
Resource Development

Welcome to our New Members!

Jeanne M. Allen

Market Development Coordinator,
LDA Life and Learning Services,
Rochester, NY

Sandra Babcock

Rochester, NY

Tamara Cohen

Director of Development,
Hillel of Rochester Area College,
Rochester, NY

Frank S. Hagelberg

Pittsford, NY

Sally Kittredge

National Center for Missing
and Exploited Children,
Rochester, NY

Courtney McGinness

Community Relations Manager,
Episcopal Senior Life Communities,
Rochester, NY

Ellen O’Connor

Director, Fund Development,
Big Brothers Big Sisters of Greater
Rochester,
Rochester, NY

Roberta Schwartz

Assistant Director,
Foundation Relations,
University of Rochester
Medical Center,
Rochester, NY

William H. Spelman

President,
William Spelman Executive Search,
Webster, NY

Dr. Richard Zollinger

Funding Factor, Inc.,
Baldwinsville, NY

From the President

Just when you thought it could not get any crazier ... The first quarter of 2005 has been marked by fast-paced change and key decisions that will help shape the future of our chapter for many years to come. Since last year's Board retreat, our chapter leadership has been talking about how best to prepare for growth. In anticipation of the 50 by 50 membership campaign from AFP International, an effort designed to increase worldwide membership from 26,000 members to more than 50,000 members before AFP's Fiftieth Anniversary in 2010, each chapter in the U.S. is readying for tremendous membership growth. With significant financial incentives that will be available for chapters who take on the challenge this is truly a historic time for all of AFP and especially the Genesee Valley Chapter.

One issue we have discussed at length is how to better position our calendar so our key events can continue to grow and flourish. In the past our fourth quarter each year has been jam packed with our highly successful regional conference, our NPD celebration, and our annual planning retreat, while our spring was relatively light. This year, we are making some very big changes in our traditional lineup of professional development opportunities. We will continue to offer our regular monthly luncheon programs the second Monday of the month. Where the big change will be is with our Great Lakes Regional Conference.

For 2005, we will NOT hold a full-day conference in the fall. Instead, we are planning two very special programs that will offer you extraordinary educational value.

- A half-day workshop on Wednesday, May 18, 2005 — featuring Penelope Burk and focusing on “Donor Centered Fundraising.”
- Also, on Tuesday, November 15, 2005 in conjunction with National Philanthropy Day Award Luncheon we will be offering a special presentation in the morning.

In 2006, we will again host our Great Lakes Regional Conference for a full day.

- Full-day conference scheduled for May 19, 2006 at the Rochester Riverside Convention Center.
- November 8, 2006 — National Philanthropy Day celebration at the Rochester Riverside Convention Center.

These changes will allow us to enhance our two signature events while readying us for future growth.

This is an exciting time for our AFP chapter and for our community. The spirit of philanthropy is alive and well in Rochester. I encourage you to get involved in the fun and be a part of our success — your success. Imagine thousands of ethical fundraisers, all well-trained in the best practices of our profession and prepared to meet the challenges of our community. This is our future. Join us.



Mark Peterson
Chapter President



2004 Ten Star AFP Chapter

Congratulations on our Chapter's Awards!

Our AFP Genesee Valley Chapter is proud to have received the following awards this year from AFP International:

Chapter Ten Star Award

The Chapter Ten Star Award honors those chapters who have accomplished many of the key objectives outlined in the AFP International's Strategic Plan. The award encourages chapters to perform specific activities designed to increase professionalism within fundraising, and public awareness of the importance of philanthropy.

There are 15 goals of which a chapter must obtain 10 and fill out an application in order to be recognized as a ten-star chapter.

Goals include:

- Holding an event or activity focusing on the importance of ethics in fundraising
- Holding a philanthropy day event
- Submitting a nomination for the AFP awards for Philanthropy
- Meeting our Every Member Campaign goals

In the past six years our chapter has received such recognition five times.

Foundation for Philanthropy Honors

The Board of Directors of the AFP Foundation for Philanthropy, has recognized our AFP Chapter as the winner of the “2004 Highest Every Member Campaign (EMC) Total Giving” for the Metro III Division*.

The awards were presented at the AFP International Conference in Baltimore. ■

*Chapters with 150 to 299 members

It's a popular belief that if you glean even one "nugget" of information from a professional development program, it was worth attending. Participants in the March monthly program gathered a veritable handful of nuggets from the AFP members who facilitated roundtable discussions on a variety of topics. Below are just a few of the pearls of wisdom imparted by the pros:

● **Karen Higman on Annual Fund:**

While the Annual Fund remains the "bread and butter" of most organizations, solicitation methods and best practices vary greatly depending on the donor pool. The better you understand your donors and prospects, the greater the chance that you will develop a mail/phone strategy that succeeds for your particular organization. Don't be afraid to experiment slightly to gain better results.

● **Judy Lemoncelli on Capital Campaigns:**

Regarding case statements, keep in mind that one size doesn't fit all. However, no matter what form or style your case statement takes, it must always showcase your organization's vision and urgency to your primary constituencies. From the donor's point of view, the document must always answer the question: "Why does this organization deserve my support?"

● **Steve Smith on Career Planning:**

Start now if you plan to take the CFRE exam here in Rochester on October 7. While the application deadline is months away, you need plenty of time to gather all of the information if you are going to have it complete 60 days in advance of the exam.

● **Gretchen Wood on Corporate Relations:**

The more that can be done to engage not only a key decision maker at a corporation/business, but also their employees in your organization, the stronger and more beneficial the relationship.

● **Tim Thomas on Direct Marketing:**

If your mailing is large enough, test various versions of the appeal. What you think may or may not work may not necessarily be true. Testing will verify that and will strengthen your response rates on future appeals.

● **Mary Kay Bishop on Major Gifts:**

Commit to the multi-step process of working with major donors: 1) identify/qualify; 2) develop initial strategy; 3) cultivate; 4) involve; 5) evaluate; and 6) assign.

Limited interactions and hurried timeframes rarely yield significant gifts. Don't forget your best prospects are under your nose — research your current donors.

● **Laura Sadowski on Membership:**

Despite the benefits exchange relationship that "Membership" implies, emphasize your organization's non-profit, fundraising status in all Membership-related materials. That will fortify your case when you request a contribution separate and apart from Membership.

● **John Gleason on Planned Giving:**

The biggest mistake fundraisers make in marketing planned gifts is in assuming that their largest annual donors are the best planned giving prospects. Dartmouth College has an exceptionally well established planned giving program and an exceptionally wealthy alumni population. The average planned gift to Dartmouth is \$100,000 (national average is \$70,006). The average cumulative giving history of their planned gift donors is less than \$1,300! For many this is a cumulative total over more than 50 years (i.e. the average annual gift for these folks was around \$26)!

● **Kelly Gagan on Stewardship:**

Donors would like to hear from the charities they support and are disappointed when they do not. When asked to indicate the number of charities they support that call them just to keep in touch, 94% of individual donor respondents and 95% of corporate donors said "none" or "hardly any". However, 93% said that personal contact influences their future giving." The lesson: call your donors to say thank you! (by Penelope Burk in her book Donor-Centered Fundraising)

● **Mark Peterson on Organizational Change:**

Organizational change can be messy and will always meet with some resistance. But remember, the solution is to begin with the end (the ideal end) in mind. No matter how long it takes, be sure there is wide agreement on why change (a new reality) is necessary or at least preferable, and what the pay off will be ... what new reality will make the journey worth the price?

● **Carol DeMoulin on Special Events:**

There are no new ideas in special events! You need to take the event you are doing, customize it, fine tune it for your organization, be creative and utilize a strong committee to help plan and implement the event. No special event should ever have an unmanageable cost to raise ratio. Use special events to draw new volunteers and donors into your organization and move them along the fundraising continuum.

● **Kathy Pavelka on Telephone Outreach:**

Mirror your telephone solicitation call to your major gifts process. Ask open ended questions. Listen. Genuinely respond. Be clear with your message. Don't apologize — your mission is important and reaching out for support is critical to your success. Always train callers — even volunteers; they want to help; help them be successful. Always provide a call script — don't leave things to chance. ■

Submitted by Laura Sadowski, Program Chair



Government Relations

“Get your house in order before the government does it for you.”

The first line in a March 30, 2005 Democrat and Chronicle article is an indication of the increased focus being placed on trustees and executives of public charities and private foundations. As fundraising professionals and advocates for the organizations we represent, it is critically important that we not only are aware of the discussions taking place — but that we are also making our voices heard on the key issues that will shape the future.

Last September, the Senate Finance Committee sent a letter to the INDEPENDENT SECTOR encouraging it to assemble an independent group of nonprofit leaders to consider and recommend actions to strengthen governance, ethical conduct and accountability for the nation’s 1.3 million charities. A panel was formed in October and an interim report — which includes recommendations to improve governance and oversight of the charitable sector that call for action by the sector, by individual charitable organizations, by the Internal Revenue Service, and by Congress was presented to the Senate Finance Committee in March of this year. A full copy of the report can be found at www.nonprofitpanel.org.

In addition to being involved in current discussions, it is also our responsibility to know and adhere to the rules and laws that govern charities in New York State. Remember, ignorance of the law is no excuse!

On your to-do list for today make a notation to visit the New York State Attorney General’s Charities Bureau website at www.oag.state.ny.us/charities/charities.html to be sure that you and your organization are in full compliance.

Remember, it is important that we show our community’s commitment to maintaining the public trust that is vital to our work. We welcome your questions and suggestions. ■

Submitted by Mary Kay Bishop, Government Relations Chair

AFP Scholarship Update

With the change in the Genesee Valley Chapter calendar, there will be no regional conference scholarships. Information regarding scholarships to attend the 2006 Great Lakes Regional Conference will be available after the first of the year.

As usual, one scholarship will be awarded to a Genesee Valley Chapter member for the 2006 International Conference in Atlanta. The deadline for applications is September 30, 2005. Watch for more information. ■

Submitted by Sara Niemeyer, Awards Chair

Helpful Hints

Tips for Staffing the Development Program

- Remember the 90/10 rule — spend 90% of the time identifying, cultivating, and soliciting the top 10% of the donors who will give 90% of the money.
- Hire a good database manager
- Hire to complement weaknesses — surround your CEO with people who have the skills and talents he or she lacks.
- Set financial and non-financial goals for staff.
- Evaluate and celebrate the successes.
- Learn from the failures.
- Make integrity and commitment to the organizations’ mission a part of every job description.
- Keep your sense of humor. ■

Submitted by Kathleen Rogers, Communications Committee

Looking for a good development professional?

Don’t forget AFP’s Executive Referral Program — the best way to reach people you want! Check us out on the web at www.afpgv.org ■

SAVE THE DATE!

National Philanthropy Day 2005

2005 expects to be another exciting year as our chapter and region celebrate National Philanthropy Day — a day that recognizes the vital role philanthropy plays in helping nonprofit organizations provide a broad spectrum of critically needed services.

This year's celebration and luncheon will be held on Tuesday, November 15, from 10:00 am to 2:00 pm, at the Crowne Plaza Rochester.

Each year, our chapter receives nominations and makes Philanthropy Awards in the following five categories:

- Outstanding Philanthropist
- Outstanding Corporation
- Robert Clinger Outstanding Fundraising Executive
- Outstanding Volunteer Fundraiser
- Outstanding Youth Volunteer Fundraiser

The awards nomination process will begin in mid-May, with an approximate nomination deadline of July 15. Be on the watch for future announcements, mailings, and email updates about the nominations process. Any and all AFP members are encouraged to participate.

One significant change in this year's celebration is that the luncheon will be preceded by an optional professional development presentation from a renowned speaker, which will be tied to the theme of National Philanthropy Day as a way to remind our members and attendees about the importance of their work.

If you have any questions about National Philanthropy Day, please don't hesitate to contact either of us — and stay tuned for updates in the months ahead.

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Interested in sponsorship or advertising opportunities?

If you are interested in sponsorship or advertising partnerships with AFP, please contact Dave Kelly at (585) 328-3228 ext. 1326.

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philanthropy
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*Change the world with
a giving heart.*



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