

# CHAPTER VERSE ONLINE

## February 2005

November 15, 2004 marked National Philanthropy Day nation-wide and locally, which the Association of Fundraising Professionals Genesee Valley Chapter celebrated at its annual luncheon at the Hyatt Regency Rochester. The luncheon was the largest National Philanthropy Day celebration our area has witnessed since the Association of Fundraising Professionals first celebrated the event in 1986. In fact, over 400 representatives of Greater Rochester's diverse, nonprofit, philanthropic, volunteer, and corporate communities were in attendance, including representatives of the 29 Philanthropy Award nominees and nominating organizations.

The theme of National Philanthropy Day was, "Change the world with a giving heart," which 2004 lived up to by recognizing the vital role philanthropy plays in furthering the profound impact that nonprofit organizations have in our communities, so that these organizations can continue to provide a broad

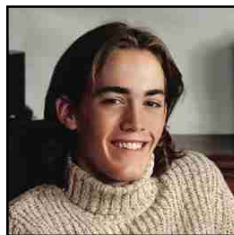
spectrum of critically needed services.

We gratefully acknowledge those that made this uplifting event possible through their generous support, including lead sponsor Manning & Napier Advisors, Inc., co-sponsors Rochester Area Community Foundation, and Telecomp, Inc., and underwriters Advanced Marketing, Daisy Marquis Jones Foundation, Nonprofit Works, and the Rochester Grantmakers Forum. We also offer our thanks to the Rochester Business Journal for partnering with us on this year's event, and to the Rochester Landscape Technicians Program for providing the beautiful floral arrangements for the event.

**national  
philanthropy  
day**



*Change the world with  
a giving heart.*



Bryan Kent



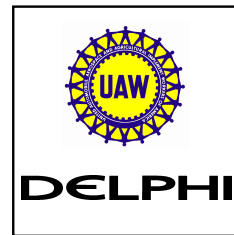
Judy Wilmot Linehan



Andrew M. Deubler



The Lipson Family



Delphi/UAW Local 1097

The recipients of the 2004 Philanthropy Awards are:

**Outstanding Youth Volunteer Fundraiser:** Bryan Kent  
Nominated by Matthew J. Flanigan, Camp Stella Maris

**Outstanding Volunteer Fundraiser:** Judy Wilmot Linehan  
Nominated by Kelly E. Gagan, Nazareth College, and Mary Ann Dever, James P. Wilmot Cancer Center, University of Rochester

**Robert Clinger Outstanding Fundraising Executive:** Andrew M. Deubler, University of Rochester  
Nominated by Frank Interlichia, University of Rochester Medical Center

**Outstanding Philanthropist:** Dawn & Jacques Lipson, MD; Eva Lipson  
Nominated by Rachel C. Wicks, CFRE, Jewish Home Foundation, and Mary Kay Bishop, SUNY Brockport

**Outstanding Corporation:** Delphi & UAW Local 1097  
Nominated by Carol Anne DeMoulin, Arthritis Foundation

For more information and photos, please go to [www.afpgv.org](http://www.afpgv.org)

# From the President

What can I say about AFP efforts this fall except – WOW!!! Once again, Judy Lemoncelli and her outstanding conference committee brought us an October program that knocked our socks off. Our regional conference is quickly becoming known as one of the best chapter based conferences in the country.

As if that wasn't enough – just a few weeks later – we followed up with National Philanthropy Day at the Hyatt. From very humble beginnings and years of begging people to attend this event, to a record turnout, thousands of dollars in sponsorships, and new partnerships with the RBJ, Manning & Napier and others. Many thanks must go to both Paul Mastrodonato and his committee and Kathy Pavelka and the Awards Committee for their wonderful work to make this day such a grand success.

And then – on December 13th – we offered congratulations to three outstanding AFP leaders who have been such a big part of building the successes we now enjoy as they completed their service on the Board of Directors. Steve Smith, Kim Hinckley, and Pam White will continue to be active in AFP and, for their past and future service, we are truly grateful.

Now it is 2005, a new year and a traditional time of reflection, hope and excitement. As I reflect on all that we have accomplished together I realize I have been a member of AFP for 15 years (nearly ten of them here in Rochester). Such an amazing transformation has taken place within the AFP Genesee Valley Chapter. It is difficult to imagine what wonderful opportunities await us in the next ten years but, as is the case with the work we do for our own institutions, the next ten years begins with tomorrow, next month, next year and each step that builds upon others. The tremendous legacy left to us all by the past leadership of this organization is an awesome gift and now it is our turn to make it happen and leave something terrific for those who follow us.

And so we begin.

2005 will be an exciting year with new initiatives to support membership growth bolstered by AFP International's 50 by 50 Campaign (designed to nearly double the size and influence of AFP worldwide before the organizations 50th anniversary in 2010). The next few years will provide a unique opportunity for us to not only grow in numbers but to also broaden our outreach to potential members by removing barriers that might keep them from joining in our work. We will continue to develop new programs offering even greater value to members including learning circles, enhanced web-based communication tools, and specially designed educational opportunities. Many of our new initiatives for 2005 will be supported by AFP International's efforts on our behalf including the new Career Planning tools and online educational offerings that will likely revolutionize our profession in the next few years.

There has never been a better time to be part of AFP. But if you want one sure fire way to increase the value of your AFP membership here it is – get involved. If you would like to be a part (big or small) of our work I hope you will call or write to me. Cheers!!!



Mark Peterson  
Chapter President  
[president@bkhs.org](mailto:president@bkhs.org)

# The Elusive CFRE

By Jeffrey W. Barhite

Hello. My name is Jeffrey and I am not a CFRE...yet!

Try to imagine my surprise when, in 2002, I received a letter from the Board Development Committee of the AFP Genesee Valley Chapter informing me that I had been nominated for Board service. Who me? It can't be. I have, in my short career in Development, always viewed myself as a rather unorthodox fundraiser. And now I am being called to service BY THE BOOK. I made a few phone calls, some inquiries, and sure enough, it was true. So began the adventure, the pursuit, if you will, of professional association fulfillment, and the elusive Certified Fund Raising Executive status. What am I going to do now? Members of the Board are expected to be in the process of certification through their tenure.

My first encounter with these exemplary professionals was the 2002 Board Retreat in Mendon Ponds Park. The activity for part of the day was an orienteering exercise. GREAT. I don't know any of these people, and am about to be launched into the woods having to share, trust, collaborate, SURVIVE, and do all of this as part of a TEAM. Oh, brother. The head count at the end of the day was the same as it had been in the morning so – I can safely say – we all completed the task although there were certainly different strategies applied to the course. And the breakthrough strategy session of the day included some of the most exciting, creative, forward thinking and imaginative processes I have experienced. I was in...whether I wanted to be or not.

Continued next page

By the time my formal term began in January of 2003 I was ready, willing, able, and pumped to give back some of the openness and acceptance I had received from these folks. I chose my committee responsibilities, I began attending the monthly luncheons and education programs in earnest, and I can tell you that every minute of my involvement in this association has been evident in every aspect of my daily work.

In 2004, the Chapter offered the CFRE Review Course. Local. Do-able. Affordable. NO EXCUSE NOT TO. Once again, in I went, head first, manual at my side, and a printout from the CFRE website with all the application and certification requirements. What an incredible forum for learning this was. A member of the local fundraising community with tremendous experience guided each session. The CFRE review course is not a course for which there is a test or examination, but rather a review of the basics of our profession as prescribed by CFRE International to be the “best practice” standards for the pursuit of philanthropy. So you can imagine the spirited discussion and debate that occurred over every segment of the syllabus. Each development professional has their own style, their own experience, their own particular position requirements, but ultimately, what the survey course prepares you for is that ultimate “best practice” that is acceptable on the CFRE examination. SWELL, MORE STRUCTURE FOR THE RENEGADE.

As a class, the survey course participants gathered the information necessary to complete the CFRE application. Let me tell you, here and now, this is NO EASY TASK. If you are thinking about pursuing your CFRE, start an education and service file yesterday. Yes, I said yesterday. In fact, if you can do so, start it five years ago. Keep everything that details your participation in fundraising education, service, and activities. You will need it. Documentation is the key to a successful application. As a team (there’s that word again) we called in favors, begged, borrowed, contacted the association’s previous and current management companies, and probably used at least one tree in the process of compiling our history of involvement for the application process.

The application complete, I sent it to CFRE International and began the waiting process for acceptance. In early October, the response arrived. The application was accepted. NOW I HAVE TO TAKE THE EXAM. Each evening I reviewed a

segment of the manual in preparation for the exam day. Then, in December 2004, off I went to Toronto (the exam is offered internationally and this was the most convenient location for me) cool, calm, well prepared, and ready to tackle the 225 questions. You are allowed four hours for the exam. It is mindful of my early experiences with college entrance exams and others of that sort. No food, no drink, no briefcase. A pencil, a ruler and an answer sheet are your only friends! A few candidates had brought along their good luck charms and were crushed when the proctors removed them. One individual was finished in less than an hour. I finished in three and a half hours, and many were still diligently at their tables when I left. It was over. I felt relatively secure in my answers, although the questions were tricky. All of the questions were multiple-choice with four right answers but only one that would be acceptable.

Now the waiting began. Your scores will be sent to you within four weeks of taking the exam...BUT...notice of certification will follow in approximately three weeks. Seven weeks. No problem. No stress. It’s the holiday season and you will be so busy you won’t even think about it. Right! Throughout the process I had many discussions about obtaining the CFRE, the value to you as a professional, the value to an employer in your career advancement, the role it plays in obtaining the gift. One good friend and mentor who caught me on a day when I had been obsessing, in a positive, if not fantasy way, suggested that I get over it. There is nothing you can do about it until the results arrive. They did. On December 23rd. I flunked.

There was a brief moment of disappointment, but the scores were close enough to tell me that I can still achieve this goal. Is the CFRE still elusive? Perhaps. Should you pursue it? Absolutely. I know I will. Regardless what you accomplish or achieve in the certification process, you will absolutely be a better development professional for the experience you will have, the connection to colleagues who share the same passion for giving, and if your attitude is positive, the fun you will have relaying your experience chasing the elusive CFRE.

Jeffrey Barhite is Director of Development for Huther-Doyle. “Providing quality addiction prevention and treatment services to individuals and their supporters to help them make positive changes in their lives.”

# Election of AFP Genesee Valley Chapter Board Members

We welcome the following new members joining the Board for their *first term*:

**Paul Mastrodonato**  
President, Nonprofit Works

**Sara L. Niemeyer**  
Assistant Director of Development, Rochester Philharmonic Orchestra

**Laura J. Sadowski**  
Vice President for Marketing and Development, Strong Museum

Welcome back to the following board members who are renewing their service with a *second term*:

**Carol Anne DeMoulin**  
President & CEO, Arthritis Foundation – Upstate New York Chapter

**Ellen Scalzo**  
Executive Director, Children Awaiting Parents

**Jan Miller, CFRE**  
Executive Director, National Kidney Foundation of Upstate New York

We are grateful for the dedication and support of our outgoing board members who have *completed their terms* on the board:

**Steve Smith, CFRE**  
Vice President, Foundation/Resource Development, St. Ann's Community  
AFP Immediate Past Chair

**Kim Hinckley**  
Director of Development, SUNY Brockport  
AFP Board Secretary

**Pam White**  
Associate Director of Major Gifts, Golisano Children's Hospital  
VP Membership

Thank you all for your service to our chapter!

Join us for the

## Advance Your Career . . . Enrich Your Spirit.

That's the theme of AFP's 42nd Annual International Conference -- being held this year in Baltimore, MD -- April 3-6th.

Registration fees:

**Until March 11, 2005**  
\$595.00 for members  
\$695.00 for nonmembers

**After March 11, 2005**  
\$695.00 for members  
\$795.00 for nonmembers

Visit [http://www.afpnet.org/international\\_conference](http://www.afpnet.org/international_conference) to take a peek at some of the fabulous programs being offered this year and get information about this conference.

If you are thinking about attending this year's conference and you would like to share a room with someone . . . but don't know who is going . . . just call our chapter office here in Rochester (586-7810) and we'll do our best to coordinate arrangements and help you reduce your expenses.



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