

National Philanthropy Day® to honor record number of nominees

By Dave Kelly, AFPGV Communications Committee

AFPGV will honor a record number of individuals, corporations and foundations at its 2014 **National Philanthropy Day** awards ceremony on Friday, **November 7**. This year saw an impressive 42 members of the Rochester community nominated for their significant philanthropic contributions to the community.

AFPGV will present awards in seven categories this year: Robert A. Clinger Outstanding Fundraising Professional, Outstanding Volunteer Fundraiser, Outstanding Volunteer Fundraiser-Youth (Group), Outstand-

ing Volunteer Fundraiser-Youth (Individual), Outstanding Corporation, Outstanding Foundation, Outstanding Philanthropist.

Tickets are \$55 for individual AFP members, \$65 for non-members and \$500 for a table of 10.

For the full list of nominees and to obtain tickets, go to www.afpgv.org. Tickets are also available by sending completed registrations and checks by **October 27** to: AFPGV, PO Box 425, Spencerport, NY 14559. Credit card reservations may be made by phone (585-586-7810), fax (888-366-9196) or mail.

2015 regional conference to expand to full day, feature national-level speakers

By Ruth E. Thaler-Carter, AFPGV Newsletter Editor

The 2015 AFPGV **regional conference** will be very different from recent years. **AFPGV** is boldly going where it has not gone for several years: to an all-day format with presenters from outside the region.

“Expand Your Horizons: Learning from National Perspectives,” to be held **April 16, 2015**, at the RIT Inn and Conference Center (Rochester, NY), will feature one non-local speaker in the morning plus a continental breakfast and lunch, and a second non-local speaker in the afternoon. Participants will have the options of breakfast and morning speaker plus lunch, lunch plus afternoon speaker, or the all-day program of both speakers and lunch.



Abbie von Schlegell, Bruce Berglund.

“We are very excited to announce that our speakers will be **Abbie J. von Schlegell, CFRE** of Fostering the Art of Philanthropy, and **Bruce Berglund, CFRE** of Donor by Design,” said conference chairperson **Karen Higman**.

von Schlegell, the author of *New*
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Welcome to our new members!

- **Calista Amering**, executive director, events & corporate relations, Rochester Regional Health System Foundations
- **Sydney Bell**, gift officer, Nazareth College
- **Larissa Bolalek**
- **Brittany L Chambers**, associate director of development, Keuka College
- **Claire Crean**, division director, March of Dimes
- **Michael Crisona, MS**, director of development, Special Olympics of New York
- **Jordyn Howe**, associate director of annual giving, Keuka College
- **Lisa E. Ireland**, director of donor stewardship, Rochester Institute of Technology
- **Lynn M. Lubecki**, executive director/CEO, Rochester Childfirst Network
- **Katie Shortt Mackey**, development associate, Rochester Museum & Science Center
- **Kerrie Anne Merz**, Bike MS manager, National Multiple Sclerosis Society
- **Kim Montinarello**, communications coordinator, Foodlink
- **Theresa Oderman**, coordinator of donor relations & stewardship, Keuka College
- **Marc Smith**, board member, Rochester Oratorio Society
- **Shawn Stover**, charity review director, BBB of Upstate NY
- **Darryl G. Tardy**, board chair, Rochester Gay Men’s Chorus
- **Jon Terry**, founder, Allergy Advocacy Association
- **Kate Whitman, MS, BA**, assistant director of development, Visiting Nurse Service of Rochester

Conference, continued

Trends in Philanthropic Behavior by Gender: Will Mars and Venus Ever Meet?, will discussing gender and fundraising — how to understand the differences between men and women when it comes to how they support or get involved with nonprofit organizations — while Berglund will focus on enhancing board development.

The whole day will provide 5 continuing education credits toward the CFRE. Each speaker session will provide 2 credits. The lunch will be in a table-topic format to provide an additional credit.

To encourage participation, fees will be similar to last year's event: for AFPGV members, \$95 for one speaker and lunch or \$135 for the whole day. This gives members the second half of the day at essentially 50 percent of the cost of attending only one session.

Fees for non-members will be announced shortly. Fees will be per-person only; an organization may not use the full-day and send two different staff people.

The conference will provide several opportunities for area nonprofit organizations and their supporters to be visible to participants through sponsorships and exhibits.

Rochester Regional Health System Foundations (the new entity incorporating the merger of Rochester General and Unity hospitals) and

the **YMCA of Greater Rochester** are already committed to sponsoring von Schlegell and Berglund, respectively. The Conference Committee is working on additional sponsorships from area nonprofit organizations.

Watch your e-mail and the AFP-GV website for details on supporting the conference as a sponsor or exhibitor, and be sure let your vendors know about the exhibit opportunities.

The Exhibitor rate will be announced shortly and will include an exhibit booth and conference registrations.

Speaker backgrounds

- von Schlegell has been a consultant with several national firms for half of her career and a senior development officer with four institutions. At Stanford University, she was the major gifts director for Silicon Valley. At the University of Chicago, she directed major gifts in metropolitan Chicago. She also was the chief development officer for the Shakespeare Theatre Company in Washington, DC, and Enterprise Community Partners in Columbia, MD, and has held senior consulting positions with Marts & Lundy and Brakeley Briscoe.

von Schlegell received **AFP International's** 1990 President's Award in recognition of her service to the profession. She is the editor of *Women as Donors*, *Women as Philanthropists*, (1993, Jossey-Bass). She is an adjunct professor at Boston University and trains frequently for AFP, Blackbaud, Annie E. Casey Foundation, CASE, the MA Nonprofit Network and the Non-profit Support Center of the Berkshire Taconic Community Foundation.

von Schlegell's nonprofit experience includes program planning, capital and endowment campaigns, major gifts programs, strategic planning, increased annual fund-raising efforts, start-up plans and programs, interim management of development programs, leadership development and volunteer and staff training.

von Schlegell has spearheaded

projects for independent schools, religious organizations and health care institutions. She has provided counsel to conservation and human services organizations and associations. is an active volunteer.

A dedicated volunteer, von Schlegell currently serves as a member of the board of the Girl Scout Council of Central and Western MA and the Oldcastle Theatre in Bennington, VT, and is a member of the Board of Visitors of Miss Hall's School in Pittsfield, MA.

- Berglund's company offers a comprehensive fundraising portfolio in YMCA, higher education, arts and culture, social service, and church fund development. He provides counsel for donor-centered fund development, endowment development, corporate sponsorship, board development, annual campaign branding, development talent identification and coaching.

Berglund began his fundraising career in higher education as director of advancement for Doane College and then served as director of development for the St. Louis Art Museum before moving to as chief development officer for the St. Louis and Milwaukee YMCAs and then serving as national director of Philanthropy and Resource Development for the YMCA of the USA, where he and his team secured contributed and sponsorship support on behalf of the YMCA of the USA and the 2,450 YMCAs nationally.

Berglund has served on the North American YMCA Development Organization (NAYDO) Council and is a member of the Association of Fundraising Professionals (AFP). He received the YMCA's top fundraising award in 2001 (Eagle Award), which recognizes and defines YMCA fundraising excellence in the United States, Canada and Mexico. He has served as a member of the Buehler YMCA board of directors.

Berglund holds a BA from Doane College, where he majored in communication and human relations, and a MA in Management from Webster University.

Association of Fundraising Professionals –

Genesee Valley Chapter

PO Box 425, Spencerport, NY 14559
Phone: 585-586-7810 | Fax: 888-366-9196

E-mail: info@afpgv.org

Website: www.afpgv.org

Twitter: [@afpgv](https://twitter.com/afpgv)

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Chapter & Verse newsletter

Ruth E. Thaler-Carter,

Editor, designer and producer

Derek DeSol,

Communications Committee chair

Tiffany Paine-Cirrone,

Marketing vice president

BE the CAUSE Campaign replaces Every Member Campaign

By *Ryan Elizabeth Kelly, AFPGV Secretary and Be the CAUSE campaign chair*

Each year, the **AFP Foundation for Philanthropy** provides us with an opportunity to strengthen our noble profession through our own charitable contributions. This year, the AFP Foundation has launched a brand new individual giving program, the **BE the CAUSE Campaign** (formerly the Every Member Campaign). It's an exciting new program that connects us to why donors support the Foundation and helps us to understand the real impact of our giving.

When you participate in BE the CAUSE, our chapter benefits as well - by reaching our 2014 fundraising goal of \$6,100, our chapter will be granted 25% of this amount to support a range of educational activities and opportunities!

We are only \$2,100 away from achieving our goal! Please join me and fellow AFPGV board members now in supporting the BE the CAUSE Campaign. It's as easy as visiting the foundation's website, where you can Donate Now.

Anyone who donates \$25 or more

will be entered into a raffle to win an overnight and breakfast for two at the RIT Inn & Conference Center. We'll even throw in a bottle of champagne!

Your gift, no matter the size, will help our chapter as well as the many initiatives supported by the Foundation. Your gift will help AFP to remain a leading force in strengthening the fundraising profession, and ensuring our ongoing impact in our communities and in the nonprofit sector.

Together we can make a difference. BE the CAUSE; make your gift today!

From the president

An exciting opportunity to connect

By *Melanie Barnas-Simmons, Rochester Regional Health System Foundations*

Summer has come and gone, and certainly ended in a big way with a well-received, NPR-style AFPGV interview session featuring Monroe County Executive **Maggie Brooks**. It was an intimate program with our members and friends, where she shared her tips on partnering with governmental agencies and the importance of keeping the nonprofit community strong.

• Now, as we approach the busy year-end, it's time to buckle down and be fundraising ROCstars. Many of us are trying to close gifts, prepare for galas and get our budgets in line for next year. It can get a bit overwhelming. Your fellow AFPGV members are a resource and sounding board. Reach out for advice, as many of us have shared the same struggles and found creative ways to overcome them.

• The nominations process for our 2015 board of directors has begun. The call for nominations has gone out and closes by **November 6**. If you are looking for the opportunity to network with your fundraising colleagues and sharpen your leadership skills, AFPGV

committee and board service is the best way to do that! From marketing and communication to membership, education, programming and planning – there are so many opportunities to get your hands dirty and make an impact. Feel free to reach out to me personally for a coffee date – my treat!



Meredith Smith, RIT associate vice president of government and community relations; AFPGV President Melanie Barnas-Simmons; and County Executive Maggie Brooks at AFPGV event.

Member news

• **Melanie Barnas-Simmons** is now director of major gifts at the Rochester Regional Health System Foundations.

• **Jess Cayer** has been promoted to associate director of development for the Little Theatre. She will continue to work to strengthen membership, write grants, plan events and coordinate the public phase of the Little's portion of the Go Public Campaign.

Upcoming AFPGV events

• **October 15**, noon–1:15 p.m., United Way: **Senior Advanced Professionals (SAP) Group** brown bag lunch/conversation about board development with **Laura Sadowski**.

• **October 17**, 7:45–8:45 a.m., Panera Bread 12 Corners: **Capital Campaign Group** monthly meeting, facilitated by **Karen Higman**.

• **October 21**, 7:30–9:30 a.m., Locust Hill Country Club: Meet the Funders.

• **November 13**, 4:30–6 p.m., Len-to Restaurant at Village Gate: **Senior Advanced Professionals (SAP) Group** networking get-together.

• **December 4**: Holiday party. Details are at www.afpgv.com.

New trends are evolving in special events

By Kate Balconi, *Holy Childhood*

It's no secret that the nonprofit event scene in Rochester is hot. From galas to golf tournaments to tasting events to an ever increasing amount of athletic events it is increasingly difficult to find a date on the calendar that isn't already filled with at least one event for a worthy cause.

With so much competition for the attention of sponsors, donors and volunteers, what is an event planner to do? It is not surprising that more than 100 fundraisers attended the AFPGV program, sponsored by Dixon Schwabl, "The Changing Trends in Special Events" to help them sharpen their skills and learn how they can make their event stand out.

Five experts with backgrounds in nonprofits, event planning, marketing, public relations, event technology, and hotel and banquet sales provided attendees with their insights relating to event planning, what to do when things go wrong, creating a great events team and more. Highlights included advice like:

- Consider approaching sponsors once a year with a menu of events for them to review.
- Get creative about the benefits you offer supporters. Access to nonprofit leadership is sought after.
- Always have a backup plan and a great team of people in place to help when things don't go as planned.

For more, visit #ROCEvents on Twitter to see tips and tweets from those in the audience at the program.

Keeping with the events theme, we asked **Jenna Van Thof**, who currently works for Dixon Schwabl as special event manager and has previously served as event coordinator for two local nonprofits to share her insights about event planning in Rochester.

Q. What roles have you played in relationship to nonprofit events?

I've played multiple event roles during my career. I've been the lead

event manager working for a non-profit, the lead event manager working alongside a client hosting the event and also as a support staff member/volunteer at an event.

Clearly, with hosting and leading the event, there is additional pressure to succeed and make sure guests are enjoying themselves, but I like to be in control and understand the event flow from start to finish. It can be a challenge in itself to work at an event without knowing all the components of it.

Q. Do you see a change in the types of charitable events that people want to support?

Yes and no. Rochester is very saturated with galas and golf tournaments, but we're not seeing a huge decrease in attendance. I believe it's due to the way we event planners are approaching our supporters and how we plan the event. It's our job to make sure we include the donors in the planning, understand what they would like in return for their

support and truly build a partnership.

Also, it's important to make the event exciting and slightly different each year. You want your guests to wonder what they should expect!

Q. What advice do you have for event planners when it comes to motivating their colleagues and volunteers to pitch in on event planning and execution?

Most importantly, thank them. Many times! It's so crucial to make your volunteers feel special. Let's be honest the event couldn't be pulled off without volunteers.

Secondly, make them feel like they are part of the planning and decision-making. You don't want to have too many cooks in the kitchen, but ask them what could be improved upon or what went well at the event. Give them the opportunity to provide feedback.

Lastly, motivate them. I've worked with many committees, and it's always fun to offer small gifts or tickets to the event to committee members that bring in the most auction items or sponsorship dollars.

Q. What factors do you think event planners and by extension fundraising teams need to take into consideration when launching an event or continuing to hold a long-standing event?

Timing is everything. Your organization needs to allow enough time to plan the event. I would suggest 10-12 months to plan a successful fundraising event. Also, do your research to see what other events are taking place.

We'd like to hear from you! What trends are you seeing in your nonprofit? Do you have advice or questions for fellow AFPGV members? Join the conversation on Twitter at #ROCEvents, consider posting on AFPGV's LinkedIn page or send your questions and advice to **Ruth E. Thaler-Carter**, AFPGV newsletter editor, at Ruth@writerruth.com.

New ways to raise funds

By Ruth E. Thaler-Carter,
AFPGV Newsletter Editor

Rochester-area organizations and individuals have been coming up with creative approaches to fundraising.

- The Village Yarn & Fiber Shop, East Rochester, hosted a Longest Day knitting event to raise funds for the Alzheimer's Association.

- Kelly Nash of Irondequoit celebrated the 30th anniversary of Heritage Christian Services by running 65 miles along the Erie Canal to raise funds for the agency, where she's the volunteer coordinator.

If your organization has developed an original or unusual fundraising event, let us know!

Scholarship news

By Kerri Phillips, Rochester Youth for Christ

As fundraising professionals, we are no strangers to asking others to “Share the Wealth.” We are clever in marketing our campaigns, we excel at collaborating and we can put on one great fundraising party. We do all this because we care about the missions of our organizations, we care about the lives changed and we care about improving our community. Asking members of our community to Share the Wealth in these missions is a joy to us.

AFP now has great news about sharing the wealth in a new way. Applications are now open for both the **Chamberlain Scholarship** and the **Karen M. Gaffney Scholarship**. Let’s get excited about forwarding the mission of the AFPGV! To help Share the

Wealth, tell every development person you know about these scholarships.

- The Chamberlain Scholarship is named in honor of **Ralph E. Chamberlain, CFRE**, who had supported the foundation’s annual fund over the years. Thanks to a generous planned gift, the AFPGV board of directors renamed its Conference Scholar Program in 2000 to honor Chamberlain’s memory and commitment to the association. The Chamberlain Scholarship will cover the entire cost of the 2015 AFP International Conference on Fundraising registration fees (minus \$10) and an additional \$1,000 toward travel, room and board.

- The Karen M. Gaffney Scholarship recognizes **Karen M. Gaffney’s**

significant contributions and service to the profession and our organization. Its purpose is to promote and enhance the professional development of fundraising professionals and encourage involvement and membership in the AFPGV.

The two Karen M. Gaffney Scholarships awarded will cover 75% of a one-year AFP membership, admission to a maximum of four programs throughout the year and paid admission to our National Philanthropy Day Awards Luncheon in November.

Don’t just read about these scholarships, share the wealth—pass the information on to all those you know making a difference in the community by raising funds! Check www.afpgv.org for qualifications and other details.

Sponsor spotlight:

Manning and Napier

By Tiffany Paine-Cirincione, James P. Wilmot Cancer Institute, University of Rochester, and Julia Stanchus, University of Rochester

Manning & Napier (M&N) has been a staunch supporter of AFPGV for more than 15 years. They have been a part of the Rochester community since 1970, assisting clients in meeting their financial goals by offering investment management and benefits products and services.

Manning & Napier hired a seasoned fundraising professional to help them give advice to their foundation and nonprofit clients. We are thrilled for the opportunity to introduce you to **James Ebenhoch**, who is excited to share this new service and get more involved with AFPGV. We had a candid conversation about Rochester’s nonprofit sector, and we’re pleased to share more about him and his insights.

Ebenhoch earned his bachelor’s degree from Niagara University and his MBA from the University of



James Ebenhoch.

Albany. He has worked for Nazareth College, Rochester Institute of Technology, the University at Albany and the Muscular Dystrophy Association (MDA). At the MDA, he began as a volunteer and worked his way up to

executive director. He’s volunteered for the regional chapter of the MDA, St. Luke’s School Board, Fairport Booster Club, Fairport Little League Coach and the Make-a-Wish Foundation in his spare time.

At M&N, Ebenhoch has been a core contributor to the company’s endowment and foundation services. For many clients, he is responsible for providing consultative services focused in annual fund, major gifts and planning giving fundraising programs within numerous capital campaigns.

Among the challenges Ebenhoch sees facing Rochester’s nonprofit sector is the upcoming “changing of the guard” in leadership – big organizations in the community have some key leaders retiring, making room for others in the profession to move up the ladder and, in some cases, leaving

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2014 AFPGV Leadership

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Ruth E. Thaler-Carter

Chapter administrator:

Brenda Thornton

Contact the AFPGV office to volunteer!

Sponsor, continued

a gap. One concern is that, for smaller organizations, filling roles with seasoned fundraising professionals can be challenging. Ebenhoch said that the larger nonprofits often survive because they have endowments and are focused on succession planning for their organization. He encourages nonprofits big and small to make sure that any upcoming leadership transitions go smoothly. Ensuring leadership stability helps retain donors and, as we all know, can be more cost-effective than gaining new ones.

Ebenhoch has researched different AFP chapters across the country and believes that ours is among the strongest. He states that “the value of AFP to our community is very high because of the unique programs offered and continual focus on strengthening this sector and its talented individuals.”

Our community’s exceptional generosity is uniquely well-stewarded, thanks in part to our robust AFP chapter. The Genesee Valley Chapter is also helping to strengthen the young lead-

ers in our area by providing prudent training. Through building their skills, experience and careers, young professionals learn to find their mission and make an impact in the community. Growing the skill-set of our young professionals also helps to have leaders ready and prepared to take over when seasoned professionals retire.

At the end of the day for Ebenhoch, the most rewarding part of being involved in the nonprofit sector is the mission of each organization and the people they serve. With a major focus on core strengths within any organization, their mission outreach can be successful. It’s the daily impact that “motivates and drives you to be the best you could possibly be,” he explains. He also advises maintaining and focusing on stewarding those who share your enthusiasm for your organization’s mission. Having advocates who are passionate for your cause will benefit your organization immensely.

For information on how to have your company highlighted in our newsletter, contact Anne McKenna at amckenna@sjncenter.org.

Survey identifies what’s most important to nonprofits in finding consultants

From GetNonprofitClients.com

About 100 nonprofits took a recent survey from GetNonprofitClients.com on working with consultants and freelancers, and here’s what they said about what they are looking for when evaluating you as a service provider.

What’s most important is subject area expertise or knowledge, direct experience with the specific type of project, and personality compatibility. Price, references, and direct experience with similar nonprofits are second tier considerations.

<http://getnonprofitclients.com/2014/09/whats-most-important-to-nonprofits-when-evaluating-you/>