



PHILANTOPICS

Association of Fundraising Professionals

March 2008

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Who to Call

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March Meeting

WHAT?

Getting Going In Planned Giving

WHEN?

Wednesday, March 12

WHERE?

Eureka College

Getting Going in Planned Giving

A native of Chillicothe, Illinois, Steve is a graduate of the University of Notre Dame, the Catholic University of America, and the National Planned Giving Institute of the College of William and Mary. Over the past 35 years he has served as Regional Director of Associated Catholic Charities for the Archdiocese of Washington, D.C., Director of Development for Rockhurst College in Kansas City, and Director of Capital Programs for Loyola College in Baltimore, Maryland.

He returned to the Midwest in 1990 as Vice President for University Relations at St. Ambrose University, and ten years later he assumed the role of Assistant to the President. Steve and his wife, Kelly, reside in Milan, and they are active members of St. Maria Goretti Parish in Coal Valley. Kelly and their two children, John and Jessica, are all graduates of St. Ambrose University.

Steve has held the designation of Certified Fund Raising Executive since 1992, and has served his Quad City Chapter of the Association of Fundraising Professionals as President, Treasurer, board member, and chairman of the mentoring program. He has also served as President of the Quad City Planned Giving Council and as co-chair of the regional Leave-A-Legacy program. He is a member of Catholic Charities U.S.A., the Council for the Advancement and Support of Education, and the Quad City Estate Planning Council, and is Chairman of the Board of the Life and Family Educational Trust. Steve previously has served on the faculty for AFP's Survey Course as well as our First Course on Fund Raising, and has been a frequent presenter with local organizations on topics of board development, strategic planning, planned giving and fundraising.

Steve's topic is "Getting Going in Planned Giving." He promises to give us practical, how-to steps to secure gifts for our organizations, including one sure-fire



Steven R. Goebel, CFRE
Assistant to the President
St. Ambrose University

technique to register a first-ever deferred commitment to one's agency or organization, if none has yet been recorded. This seminar is not a lawyer's compendium of trusts and tax laws, but a simple, straight-forward introduction to promoting bequests and charitable estate planning.

The March 12 AFP program will be held at Eureka College located at 300 East College Street, Eureka, Illinois, 61530. The cost is \$15 for AFP members and \$20 for guests. Registration is at 11:30 a.m., lunch is provided at 11:45 a.m. and the presentation begins at 12:00 p.m.

Directions

From Bloomington: Take I-74 West towards Peoria. Take IL-117, Exit 112 towards Goodfield. Turn right onto IL-117. Turn right onto East College Street.

Reservations

To RSVP, contact Gloria at devlpmt@peoriasymphony.org. Reservations are due by March 10. (Form on Page 2)



April Gould, CFRE

2007 AFP President's Annual Report

Thanks to so many people for an outstanding year of AFP! As you can see, in the attached reports we had great attendance at informative meetings, maintained a steady membership, and provided excellent stewardship of funds. Some of the 2007 highlights include:

- Thanks to Rich Draeger, we launched our chapter website, www.afpcentralillinois.org. We hope that this tool will make it easier for members and others interested in AFP to gather information.
- AFP Central Illinois Chapter once again received the 10 Star Chapter Award, recognizing a variety of services to our members.
- We awarded a Wilson Schroeder Membership Scholarship, and Larry Brinkman attended the International Conference in Dallas as a Chamberlain Scholar.
- The National Philanthropy Day Awards Luncheon which honored several of the area's outstanding philanthropic leaders saw a record attendance and sponsorship thanks to the committee led by Shelly Smith, CFRE, and Janet Bantz Glavin.
- Attendance at the Fundraising Basics 101 reached 80 people thanks to the efforts and leadership of Stephanie Pickett. Held at the Radisson, the day-long event featured multiple topics for the beginning fundraiser.
- Both President Elect-Mark Roberts, CFRE, and I attended the first ever AFP Leadership Academy hosted in Lexington, Kentucky, in October. Additionally, I attended the first Presidents' Council meetings both in Dallas and in Lexington.

Thanks to the membership and those who served on committees and the AFP Board of Directors for making 2007 a great year for the Central Illinois Chapter AFP.

Make Your
Reservations
Today!

Getting Going in Planned Giving

Wednesday, March 12

Eureka College

Registration at 11:30 a.m., Lunch at 11:45 a.m.

Program begins promptly at 12:00 p.m.

Name: _____ Organization: _____
 Address: _____ City/State/Zip: _____
 Phone: _____ E-Mail: _____

\$15 per member \$20 per guest Amount Enclosed \$ _____

To make your reservations for the February meeting, contact Gloria Dearborn at devlpmt@peoriasymphony.org.

Please send this form with a check marked "March" payable to: **AFP Central Illinois Chapter**

Central Illinois AFP, P.O. Box 5323, Peoria, IL 61601

RESERVATIONS ARE DUE BY March 10.

2007 Every Member Campaign Reaches It's Goal!

Robin Ballard

A grateful **"Thank You"** to those listed below. Because of your generosity, the EMC raised \$2,345 in support of the AFP Foundation. You can feel proud that you helped AFP to: 1.) continue its high professional ethical standards, 2.) provide access to research and educational resources for our members, and 3.) maintain best practices and personal integrity in the fundraising profession.

Sterling Medalist (\$250 - \$499)**Carole Ringer, CFRE****Dennis Steele, CFRE****Silver Medalist (\$100 - \$249)**

Robin Ballard

Joette Blakesley

Joy Hutchcraft, CFRE

Michael Maginn

Roger Meyer, CFRE

Mark Roberts, CFRE

Richard Whitlock, CFRE

Bronze Medalist (\$50 - \$99)

Larry Brinkman

Sarah Chaddock

Gloria Dearborn

Rich Draeger

Robert Gray

April Gould, CFRE

Jennifer Lee

Amy Sajko, CFRE

Shelly Smith, CFRE

Linda Yoder

Blue Ribbon Donor

Rachel Allen

Vikki Baptiste

Kristen Berchtold

Kathryn Carter

John Gibson

Janet Bantz Glavin

Jerry Heller, CFRE

Tracy Holder

John Wahlfeld

Gary Underwood



Roger Meyer, CFRE

2007 Treasurer's Report

Expenses	2007
AFP Foundation	550
Annual Membership Directory	100
Bank Charges	36
Basics 101	1,650
Chapter Meetings	2,750
Credit Card Processing Fees	100
Database Manager	2,000
Gifts	150
Miscellaneous	100
Newsletter/Postage	100
Newsletter/Printing	216
NPD	5,100
NPD Late Fees	72
PO Box & Bulk Rate Permit	160
Postage	400
Printing & Stationery	150
Program & Speaker Fees	500
Schlrsp Cert & Survey	500
Scholarship/First Course	500
Scholarship/Intl Conference	1,000
Scholarship/Membership	980
Speaker Recognition	100
State of Illinois	20
Travel/Nat'l Assembly	1,500
Website/Development	200
Website/Maintenance	100
Basics refund	
Total	19,034

Revenue	2007
Basics 101	1,650.00
Chapter meetings	3,800.00
Dues from National	2,800.00
Every Member Campaign	500.00
Label & ad income	150.00
Miscellaneous	100.00
National Philanthropy Day	8,500.00
Interest	-
Total	17,500.00

2007 External Affairs Annual Report

Janet Bantz Glavin



Shelly Smith, CFRE

The 24th annual National Philanthropy Day was celebrated on November 14, 2007 at the Par-A-Dice Hotel in East Peoria with a record high of 217 people in attendance.

The following awards were presented:

Outstanding Philanthropist

Gerald & Helen Stephens

Bob & Virginia Weaver

Outstanding Philanthropic Corporation

Walters Brothers Harley-Davidson

Outstanding Philanthropic Foundation

“His First Foundation”

Paul A. Funk Foundation

Lewis J. Burger Outstanding Volunteer

Don & Barb Western

Outstanding Philanthropic Organization

Tremont High School Student Council

Outstanding Youth in Philanthropy Ages 5-17

Austin Charlet

Outstanding Youth in Philanthropy Ages 18-23

Bradley University Leadership & Service Fellows

Ian T. Sturrock Outstanding Fundraising Executive

Robin L. T. Ballard

Special thanks to the National Philanthropy Day Committee:

Janet Bantz Glavin, Shelly Smith, Co-Chairs,

Joette Blakesley, Kristen Bertchold, Gloria Dearborn, Katherine Kennedy, Jennifer Lee, Roger Meyer, John Morris, Nicole Parlier, Kimberly Roese, Dennis Steele, Jim Sullivan, and John Wahlfeld.

2008 AFP By-Laws Amendment Information

As part of its governance changes, the International Headquarters of AFP has prepared standardized by-laws which Chapters are required to adopt by June 30, 2008.

In various communications with Chapter Presidents and others, AFP reports the new standardized by-laws have been carefully crafted to achieve the following:

- Afford maximum protection for the Chapter and its officers;
- Reflect governance changes approved by the 2006 Delegate Assembly;
- Streamline the bylaws by eliminating unnecessary language and removing sections that are best addressed by Chapter policies and procedures;
- Standardize the bylaws of all AFP Chapters;
- Put into place best practices for associations and their governance practices.

Some of the significant changes that have been made to the Chapter bylaws include:

- Removal of the specific membership categories in AFP.
- Removal of specific duties of Chapter Board officers and directors with the intent that these duties will be included in Chapter Board policies.
- Approved size of Chapter Boards.
- Sets terms of office at one year, with the exception of the President, President-elect and Immediate Past Chair.
- Sets a maximum lifetime service on the Chapter Board at eight years.

Current and proposed by-laws are posted on the Chapter's web site for your review.

www.afpcentralillinois.org