



PHILANTOPICS

Association of Fundraising Professionals

November 2008

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25th Annual National Philanthropy Day Awards Luncheon

Changing Our Community With A Giving Heart

Please join us for the 25th Annual National Philanthropy Day Awards Luncheon on November 12 at the Embassy Suites in East Peoria. National Philanthropy Day (NPD), sponsored by the Association of Fundraising Professionals, is a special day set aside to honor the great contributions of those in the philanthropic community who are dedicated to the enrichment of our world. NPD provides an opportunity to reflect on the meaning of giving and all that it makes possible. NPD celebrates the endless daily contributions that individuals and organizations across the country make to countless causes and missions. Donors, volunteers, and leaders of national, local, and community-based non-profits are recognized for their special gifts.

The following 2008 award recipients will be honored:

Outstanding Philanthropist

Christine Bonati Bollwinkle

Outstanding Philanthropic Corporation

RLI

Lewis J. Burger Outstanding Volunteer Fundraisers

Lynn N. Banta
Dave & Karen Magers

Outstanding Youth in Philanthropy Ages 5-17

Students At Banner Elementary

Outstanding Youth in Philanthropy Ages 18-23

Illinois State & Illinois Wesleyan Universities
Habitat For Humanity Campus Chapter

Ian T. Sturrock Outstanding Fundraising Executive

John B. Wahlfeld

Special Recognition Award

Bill Hardin

The cost is \$30 per person and reservations must be received no later than November 5. See page 2 for a registration form. For additional information, contact Shelly Smith at 309-677-3091 or ss@bradley.edu or Rich Draeger at 309-655-1348 or



FRIENDS OF DIVERSITY
ASSOCIATION OF FUNDRAISING PROFESSIONALS 2007



**25th Annual National Philanthropy Day
Luncheon Reservation Form**

Please reserve _____ place(s) at \$30 per person

If possible, please seat me at the table of _____
(tables seat ten)

Please Print

Name: _____

Organization: _____

Address: _____

City: _____ Zip: _____

Phone Number: _____

E-mail: _____

Special Needs (dietary / physical): _____

Are you a nominator? _ Yes _ No
Are you a past award recipient? _ Yes _ No

If you are reserving for more than one person, please list the names of the individuals to be included at your table on a separate sheet.

Enclosed is a check for \$ _____ (\$30 per person)
Please make checks payable to: *AFP, Central Illinois Chapter*

Reservations must be received no later than November 5

Reservations are not refundable, but are transferable

Send this form, along with payment, to:

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

IRA Rollover Provision Reinstated Through 2009

President Bush has signed into law the \$700 billion economic bailout bill (H.R. 1424, Financial Rescue Package), which includes a two-year extension of the IRA Rollover provision as well as other charitable giving provisions.

The provision will be made retroactive to Jan. 1, 2008, and will apply to gifts made from that date through Dec. 31, 2009.

The provision exempts from taxable income any funds transferred ("rolled over") from an Individual Retirement Account (IRA) to a charitable organization. The following limitations apply:

- The donor must be age 70½ or older.
- The cap on annual IRA rollovers is \$100,000.
- The contribution must be a direct gift to a charity (no planned gifts).

The provision expired at the end of 2007, and one of AFP's chief legislative goals has been to reinstate the provision and make it permanent.

"This is a huge victory for the fundraising community," said Paulette V. Maehara, CFRE, CAE, president and CEO of AFP. "A critical part of this success has been all of the letters, phone calls and emails that AFP members have sent to Congress and the White House. I thank every member who got involved over the past year. Your work has paid off!"

AFP will continue to push for changes to the rollover provision in 2009, including lowering the age for donors, increasing the cap on gifts and making the provision permanent.

2008 Abel Hanson Award Winner

The Central Illinois Chapter of the Association of Fund Raising Professionals is proud to have received recognition as the Abel Hanson award winner for 2008.

Our chapter earned the award due to several efforts. Our Communications Manager works with the board and other members, as well as with our database manager to publish a monthly newsletter that is sent to all current members. Included each month are program announcements, bulletin boards, job openings and our February newsletter serves as the Chapter Annual Report, with all board members reporting on their area of responsibility.

The clinching piece in the application was the development of our chapter website. President-elect Mark Roberts attended the recent AFP Leadership Conference in Nashville, Tennessee and represented the chapter in accepting the 2008 Abel Hanson Award for Chapter Grouping II. Mark reported that "Many of the attendees made a point of congratulating us on our efforts, and asked more about what we did to earn this award. I enjoyed filling them in on all the planning and hard work that goes on here in central Illinois!"

Thanks to everyone who made this award possible, from the Board to the membership and especially our Database Manager Heather Wolbeck and Web Manager Lisa Murphy.

Direct Mail: Paying For Your Undeliverable Mail

In an effort to cut the amount of undeliverable mail it processes, the United States Postal Service (USPS) is requiring mailing lists be updated and verified more frequently. Nonprofits that are not aware of the new rules may find themselves paying first class rates on their standard mail (nonprofit discounted rate) mailings.

The USPS is increasing the minimum frequency of Move Update processing from 185 calendar days to 95 days prior to the date of mailing.

The deadline for compliance with the new standards is Nov. 23. To comply, mailers must update their mailing lists to account for recipients who have moved every 95 days at minimum. For example, a mailing entered on Nov. 23 must bear names and addresses that were updated no earlier than August 20.

“In fiscal year 2004 the Postal Service handled 9.7 billion pieces of UAA [undeliverable-as-addressed] mail at a cost of \$1.8 billion,” USPS notes in a press release. “The new standards will result in better address quality by removing incorrectly addressed pieces from subsequent mailings, which in turn will reduce undeliverable-as-addressed mail.

In order to meet the new Move Update standards, a mailer must update its addresses using one of five methods approved by the Postal Service. The method recommended by most mail houses is the National Change of Address (NCOA) update method.

“In my opinion, NCOA is the easiest and most effective method of cleaning the list of UAA mail,” says AFP member Phyllis Robinette Burns, who owns and operates Burns Mailing & Printing Inc. in Knoxville, Tenn. “Not only does it keep the nonprofit within the specifications of the USPS, but is an effective way for nonprofit organizations to keep current with their donors who have moved. It reduces printing, mailing labor and postage of mail that would never reach donors.”

Repercussions

Nonprofit organizations that do not update addresses they mail to within 95 days, verified by submission of a Certificate of Move Update Compliance (PS Form 6014), may be charged more for the mailing.

“The big thing that will impact all discounted mail including First Class and Standard (nonprofit) mail is that after an undetermined grace period, mailings that have undeliverable addresses in their mailings will be charged retroactively for the bad addresses,” Burns explains. The USPS does not at this time know how long the grace period will be.

“If the UAA exceed a certain percentage, and again this is undetermined by the Postal Service at this time, the nonprofit could be charged first-class postage on the entire mailing,” continued Burns. “The Postal Service will check the mailing with a system called Merlin but the mailers will not know until several days later if their mailing failed the Move Update or if they have reached the set percentage of undeliverable mail that requires them to be charge first class postage.”