



PHILANTOPICS

Association of Fundraising Professionals

March 2009

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kimberly@tcrorg.com

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spickett@chail.org

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Heather Wolbeck 309-643-9236

hwolbeck@sbcglobal.net

Beyond the Ask

Negotiating and Closing the Gift

Presented by Roger Meyer, CFRE



Please join us for the March 11th AFP Chapter Meeting on *Beyond the Ask-Negotiating and Closing the Gift*, presented by Roger Meyer, CFRE.

Many say the "Ask" is the most important part of the solicitation. While it's true the gift would not be made if it were not solicited, the follow-up steps to the solicitation are as crucial to the closing of the gift. From personal experience of closing multi-million dollar gifts at various organizations, Roger will review techniques and skills that will enhance the fund-raiser's ability to close both major and planned gifts. This interactive session will explore ways to work with your donors and their financial and legal advisors to overcome objections and obstacles to closing the gift.

The negotiating and interaction with the donor and their advisors to both inform and customize the gift are the most interesting aspects of closing gifts. From actual examples, the group will review skills and techniques to move gifts toward closing. In addition, many gifts need to be "sold" internally to the charity and its leaders and this art of negotiation will also be explored. The session is designed to be interactive and provide for interaction of the group.

Roger Meyer has more than 30 years experience in the fund-raising field. Currently, he is the Chief Development Officer of the OSF Healthcare Foundation, which consists of Foundation Councils and staff that support seven OSF facilities in Illinois and Michigan.

Prior to coming to OSF, Roger served Concordia University in Nebraska, the University of California Los Angeles, and St. Louis Children's Hospital. At UCLA, he served as the Director of Major and Planned Gifts and Director of Principal Gifts. As director of Medical Sciences

Development he managed the development efforts for all fund-raising programs of the School of Medicine, four hospitals and all medical research units with a professional staff of 24. Under his leadership, they closed over \$150 Million in FY 1998.

Roger received his bachelor's degree from Concordia College, Nebraska, and his Master's degree from the University of Nebraska. He is a Certified Fund Raising Executive.

The March 11 AFP Chapter meeting will be held at Illinois Central College - East Peoria Campus. The cost is \$15 for AFP members and \$20 for guests. Registration begins at 11:30 a.m., lunch at 11:45 a.m. and the program begins promptly at noon and will end by 1:15.

Directions from Peoria: ICC is right off of Route 24. Follow the signs to the Visitor's Lot. Or take I-74 East to Route 116. Take a right on Centennial Drive and take a left into the ICC campus at the light and follow the road around to the Visitor's Lot. Enter the building through the "Main Entrance" and follow the signs to the Founder's Room.

Directions from Bloomington: Take I-74 West towards Peoria. Then take the 116 exit to Centennial Drive and take a right. Take a left into the ICC campus at the light and follow the road around to the Visitors Lot. Enter the building through the "Main Entrance" and follow the signs to the Founder's Room.

Reservations: To RSVP, contact Stephanie at spickett@chail.org. Reservations are due by March 6th.

A reservation form is located on page 3.



Message from the President

Mark Roberts, CFRE



Dear Central Illinois AFP members and friends,

As president of the AFP Central Illinois Chapter board of directors, I am delighted to be serving an organization that boasts a local membership of over 90 individuals who are committed to the profession of fundraising. Ours is one of over 200 chapters throughout the world working to advance philanthropy through advocacy, research, education and certification programs. The association fosters development and growth of fundraising professionals and promotes high ethical standards in the fundraising profession.

I am honored to be serving alongside other dedicated AFP Central Illinois Chapter board members who are working hard to ensure that your AFP experience is of value to you. Currently, the board is beginning the development of a strategic plan that will guide the direction our chapter will take in the coming years. A committee has been formed to organize a day-long retreat in March to work on this plan. The Board is excited about identifying a strategic direction for our Central Illinois Chapter, and we look forward to sharing the results of the planning process with our members and our community.

A message to those of you reading this who are NOT members of AFP: please consider joining us! By all accounts, 2009 promises to be a challenging year for all concerned. What better time to come together with fellow professionals to network and learn collaboratively? Your investment in continuing professional education now will pay dividends in the near and long term. For more information about AFP membership, please contact our Vice-President of Membership Services, Robin Ballard, at (309) 694-8511, or via email at rballard@icc.edu.

As always, I welcome calls and emails from chapter members, and from those who want to know more about AFP. I can be reached at (309) 674-8730, or via email at mark@communityfoundationci.org.

Cheers to a successful 2009, and best regards!

Mark Roberts
President, AFP Central Illinois Chapter

C. Wilson Schroeder Membership Scholarship

The AFP Central Illinois Chapter is accepting applications for C. Wilson Schroeder Membership Scholarships. The late C. Wilson Schroeder was a devoted fundraiser and one of the founding members of the National Society of Fundraising Executives now called the Association of Fundraising Professionals. To honor his memory, the Central Illinois AFP Chapter awards membership scholarships through the C. Wilson Schroeder Membership Scholarship program. The chapter will consider applications from fundraisers or executive directors whose organizations budgets are constrained but who would benefit from AFP membership.

Up to four membership scholarships will be awarded each calendar year. The deadline for applications is twice each year: April 15 and October 15. Applications will be reviewed at the May and November AFP chapter board meetings (first Thursday).

For more information or an application, contact April Gould, CFRE, at 309-655-1653, April_Gould@usc.salvationarmy.org, or visit the chapter website to download an application at www.afpcentralillinois.org under "News."

Association Membership Dues To Increase

In order to continue to develop and enhance benefits and services and ensure adequate resources to meet member needs, AFP national approved a \$30 increase, the first in four years, for members in the Active and Associate categories. This change, effective April 1, 2009, will bring annual dues to \$250.

AFP is constantly striving to keep a firm handle on costs and is constantly reviewing programs and services to ensure they meet relevant and significant member needs and are not too costly in terms of resources.

Even with these cost-cutting efforts, AFP has been able to develop a number of new programs and benefits for members, most of them free of charge.

Over the past four years, as a means to avoid an increase, AFP has streamlined programs and eliminated unnecessary or irrelevant service while providing additional high-quality benefits. At this point, the association cannot continue to provide the new services that members need to compete in an increasingly competitive environment without raising its membership dues.

The dues increase will fund a variety of new programs that will meet needs identified by members, volunteers and staff, as well as enhance certain existing services. Some examples include the ethics education model that is currently under development, the new CFRE Review Course and increased public affairs and government relations initiatives by the association, including initiatives to increase member and public perception about how the profession is viewed and appreciated. AFP will be, in part, guided by its recent Membership Satisfaction Survey and other member feedback, as well as its 2007-2010 Strategic Plan, to help determine additional programming.

There is increasing evidence through AFP's *State of Fundraising Survey* and other materials that membership in the association is directly linked to raising more funds for an organization. In addition, a member who uses just a few of AFP benefits will quickly receive their membership dues' worth of services.

The Central Illinois AFP Chapter will not increase local chapter dues; they will remain at \$40 a year; total annual dues for both will be \$290.

For more information, FAQs and a list of member benefits, please go to the Central Illinois Chapter website at www.afpcentralillinois.org and click on "2009 Dues Increase".



Roger Meyer, CFRE

Beyond the Ask - Negotiating and Closing the Gift

Wednesday, March 11, Illinois Central College, East Peoria
 Registration at 11:30 a.m., Lunch at 11:45 a.m., Program 12:00 p.m.

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

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

To make your reservations for the March meeting, contact Stephanie Pickett at spickett@chail.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 6.

Chief Executive Officer Position Opening

Chief Executive Officer- Girl Scouts of Southern Illinois, Headquarters in Glen Carbon, Illinois

Exceptional opportunity for an accomplished executive to lead the realignment of two Girl Scout Councils serving over 40 counties in Illinois. Will provide strategic and dynamic vision in support of the mission to bring world class programs to over 16,000 girls. In collaboration with the Council Board of Directors, the CEO will direct the senior management team, and lead an organization with a \$4-MM operating budget, a staff of 76, and multiple properties. The ability to attract and motivate volunteers and board members to achieve seamless unity is essential, along with dynamic skills to lead an organization through rapid change. A minimum of 7 years' proven experience and outstanding communications skills are required. Experience in fundraising, strategic planning, community relations and board governance is a must. Corporate executives with dedication to the mission of Girl Scouting who can lead through exceptional people relations are encouraged to apply. Advanced education and training preferred. Base compensation of \$85k+.

For consideration, please email your resume and cover letter to:
Evergreen.Source@att.net or fax to 800-451-1451.

Girl Scouting builds girls of courage, confidence, and character, who make the world a better place.

Fully Committed to Equal Opportunity M/F/D/V

AFP Needs Your Input

The Central Illinois Chapter of the Association of Fundraising Professionals (AFP) needs your input on a very important project. The Board of the chapter is beginning the development of a strategic plan that will guide our work and the direction our chapter will take in the coming years. A committee has been formed to organize a day-long Board retreat in March to work on this plan.

We are dedicated to serving our members and our local fundraising community, but we need your assistance to determine how we might be better able to meet your specific needs. We are developing an online survey that will "go live" in the next week or two. The survey will only take a few minutes of your time, but will provide invaluable information to be used in the strategic planning process.

Whether you are a current member of AFP, a past member of AFP, or a colleague in our fundraising community, your input is important to us! Please help us meet your needs and those of other local fund development professionals by completing the survey once you receive the link!

The Board is excited about identifying a strategic direction for our Central Illinois Chapter and we look forward to sharing the results of our planning process with our members and our community.

Watch for the link to the survey coming to your inbox very soon! Thanks for your help!



Mark your calendar now for our AFP August 12th chapter meeting featuring nationally known speaker Penelope Burk!

2008 President's Report

April Gould, CFRE



2008 was another great year for AFP. We had tremendous membership growth and celebrated the 25th National Philanthropy Day Awards Luncheon in November. In March, at the AFP International Conference on Fundraising in San Diego, the Central Illinois Chapter was once again awarded the Chapter 10 Star Award. Thank you for your support and participation in the events of AFP Central Illinois Chapter.

Some of the 2008 highlights include:

- We continued to utilize and enhance our chapter website, www.afpcentralillinois.org, thanks to Rich Draeger, CFRE.
- AFP Central Illinois Chapter received the 10 Star Chapter Award from the AFP International, recognizing a variety of services to our members.
- C. Wilson Schroeder Membership Scholarships were awarded to Jeff Parmenter, Joe Knapp, Melinda Figge and Danielle Easton.
- Several chapter members attended the International Conference on Fundraising in San Diego March 31-April 2. I attended the President's Council there on behalf of the chapter.
- The Fundraising Basics 101 hosted 34 people thanks to the efforts and leadership of Stephanie Pickett. Held at the Ramada Inn on Brandywine in September, the day-long event featured multiple topics for the beginning fundraiser.
- In August, the chapter hosted Val Lay, our regional representative, and Catherine Wemette, from the International office, for a preliminary strategic planning session.
- President Elect-Mark Roberts, CFRE, attended the AFP Leadership Academy hosted in Nashville, Tennessee in October.
- The 25th National Philanthropy Day Awards Luncheon honored several well-deserving philanthropic leaders. The committee, led by Shelly Smith, CFRE, and Rich Draeger, CFRE, raised outstanding sponsorship for the chapter programs and created a great event.

Welcome New AFP Members

Robin Ballard



Please welcome the following new members who joined AFP in January!

Danielle Easton

Development & Marketing Director
Crittenton Centers
442 W. John Gwynn Jr. Avenue
Peoria, IL 61605-2476
daniellee@crittentoncenters.org

Andy Lehman

Vice President
Lifesong for Orphans
P.O. Box 40
Gridley, IL 61744-0040
andy@lifesongfororphans.org

2008 External Affairs Report
Shelly Smith, CFRE & Rich Draeger, CFRE



National Philanthropy Day was celebrated on November 12, 2008 at the Embassy Suites Hotel in East Peoria with over 200 people in attendance.

The following awards were presented:

NPD 2008 Award Recipients

Outstanding Philanthropist

Christine Bonati Bollwinkle

Outstanding Philanthropic Corporation

RLI

Lewis J. Burger Outstanding Volunteer

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

Special thanks to the National Philanthropy Day Committee:

Rich Draeger, CFRE & Shelly Smith, CFRE, Co-Chairs, Kristen Bertchold, Gloria Dearborn, Katherine Kennedy, Jennifer Lee, Nicole Campen, Mike Maginn, Julie Witte and John Wahlfeld.

2008 Treasurer's Report
Roger Meyer, CFRE & Mike Maginn



Revenue	2008
Basics 101	2,010.00
Chapter Meetings	5,455.00
Dues from National	3,880.00
Every Member Campaign	572.50
Label & ad income	75.00
Miscellaneous	245.35
National Philanthropy Day	10,965.00
Interest	407.08
Total	23,609.93

Expenses	2008
AFP Foundation	550.00
Bank Charges	136.00
Basics 101	1,059.62
Bulk rate permit fee	175.00
Chapter Meetings	3,656.12
Database Manager	1,623.62
Gifts	33.43
National Philanthropy Day	7,875.02
PO Box Rent Fee	77.00
Postage	55.35
Program & Speaker Fees	1,898.20
Scholarship/Membership	520.00
State of Illinois	20.00
Travel/President's Council	1,118.94
Website/Maintenance	455.00
Website/Hosting	210.70
Total	19,464.00