



PHILANTOPICS

Association of Fundraising Professionals

May 2009

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CFRE: What, Why, and How?

Local CFRE's Answer Your Questions!

Please join us for the May 13th AFP Chapter meeting about the CFRE: What, Why, and How. A panelist of three local CFRE's will be on hand to answer your questions about the Certified Fundraising Executive credential: what is it, why would anyone want to obtain it, and where to begin!

Mark Roberts, CFRE, is the Executive Director at the Community Foundation of Central Illinois. He has been in the fundraising profession for 8 years and obtained his CFRE credential in 2007.

Mark chose to pursue the CFRE because he believes that the designation says something about him as a professional. It demonstrates his commitment to the profession, increases his credibility, improves his skills and knowledge, and reflects his achievements in professional practice. Mark is very glad that he put in the time and effort to earn the certification.



April Gould, CFRE, has been employed by The Salvation Army since 1995. She has helped oversee the annual Tree of Lights Campaign and the successful *HOPE FOR THE FUTURE* capital campaign which allowed renovations to the Child Care Center, Eagle Crest Camp and The Salvation Army Sylvia Fites Family Services Center in Peoria. As a Gift Advisor, she serves The Salvation Army throughout central Illinois including Fulton, McLean, Peoria, Sangamon, Tazewell, and Woodford counties. She enjoys visiting donors, building relationships and generating funds through wills, Gift Annuities and general contributions which grow the ministry of The Salvation Army.



She has been CFRE certified since 2005 and obtained her certification to honor her profession as a fundraiser.

Rich Draeger, CFRE, is the Assistant Development Director at the Salvation Army Heartland Division in Peoria. He has been in fundraising for ten years and is Central Illinois AFP's most recent CFRE, having obtained the credential in June of 2008.



Rich decided that the CFRE credential would help him in his career path. Furthering his education helped him to advance within the development department. While he still handles the Public Relations duties at the Salvation Army, his job is at least 75% fundraising. Rich has just enrolled in the Crescendo Gift College program and hopes to gain an additional certification as a Certified Gift Planning Associate within the next 18 months.

The May 13th AFP Chapter meeting will be held at Illinois Central College in East Peoria in Room TC214. Please park in the Visitors lot (V lot) and enter the Technology Center located directly in front of the Visitor's lot. Take a right down the hall and TC214 will be on the right. There will be signs directing you to the meeting room. 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.

Directions from Bloomington: Take I-74 West towards Peoria. Take Exit 95 turning right onto IL-116N. Turn right onto Centennial Drive going up the hill. Turn left onto College Drive.

Reservations: To RSVP, contact Stephanie at spickett@chail.org. Reservations are due by May 8. A reservation form is located on page two.

AFP Provides Guidance for Difficult Times

The following information was taken from the national AFP website: AFP has developed a new guidance document that contains tips and advice for charities trying to raise funds in the current economic environment.

Fundraising in a Difficult Economy, developed by AFP senior leaders and members of its Communications and Marketing Committee, contains 11 key points and perspectives, along with numerous strategies and tactics, which charities can use to connect with donors and raise critically needed funds. The short document is available free of charge on the AFP website. *"We're committed to ensuring that all members achieve fundraising success, even in this difficult environment,"* said Paulette V. Maehara, CFRE, CAE, president and CEO of AFP.

You can read this document by going to: <http://www.afpnet.com> and then scroll down under "What's New on AFP" and click on "AFP Offers Fundraising Tips, Guidance in Difficult Economic Times."

Virtual Seminar Replay of The Frugal Researcher: How to Do Successful Research on Little to No Budget

Date: Friday, April 24th

Time: 2 pm – 4 pm

Location: Bradley University, Bradley Hall, Room 270, University & Main, Peoria, Illinois 61625

Registration: RSVP to crosson@bumail.bradley.edu

Cost: FREE for APRA-IL (Association for Professional Researchers for Advancement), Members; \$5 for Nonmembers

Membership: If you are interested, join APRA-IL now (Go to: <http://www.apra-il.org/>) for \$35 and attend the seminar for free and enjoy membership benefits.

Capacity: Limit 30

Visitor Parking at Bradley University: Access the Visitor Parking Lot from the University St entrance to campus. The Visitor Lot is on your left, off St. James St., after the first stop sign. The exit machine in the Visitor Lot is setup to take quarters to exit the parking lot (one quarter per vehicle).

CFRE: What, Why, and How? Local CFRE's Answer Your Questions!

Wednesday, May 13, 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 May meeting, contact Stephanie Pickett at spickett@chail.org.

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

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

RESERVATIONS ARE DUE BY May 8.

Legislative Update Regarding Charitable Tax Issues
Roger Meyer, CFRE



Senate Approves Resolution with Important Charitable Giving Provisions

The Senate approved its fiscal year 2010 budget resolution (S. Con. Res. 13) on Thursday night, April 2. The budget resolution is a non-binding document, setting out a blueprint for how Congress will move major legislation over the next year and how much discretionary spending will be available through the annual appropriations process. Before approving its budget resolution, the Senate adopted three important amendments dealing with charitable giving.

First, the Senate adopted an amendment by Sen. Byron Dorgan (D-ND) calling on Congress to extend the IRA Charitable Rollover provision and expand it to allow for life-income gifts. Inclusion of the IRA Charitable Rollover and mention of life-income gifts in particular represents a significant step towards a permanent and expanded Rollover. This is a noteworthy recognition by members of the Senate, it is hoped such language will remain in any final budget resolution.

The Senate also approved two separate amendments emphasizing support for tax incentives for charitable giving. These amendments were offered in response to President Obama's proposal to decrease the charitable deduction for families earning over \$250,000 in order to finance new health care proposals. One amendment was introduced by Sen. Robert Bennett (R-UT) and would bar changing current tax laws to pay for healthcare reform with charitable contribution deductions. A second amendment, introduced by Senator John Thune (R-SD), would ensure that organizations providing religious, educational, cultural, healthcare, and environmental services are not harmed by changes to the charitable giving deduction. This amendment received a recorded vote, with 94 Senators voting in favor.

The House also adopted its budget resolution (H. Con. Res. 85), and the House and Senate will now go to conference to reconcile differences between the two resolutions.

American Council on Gift Annuities Studies Gift Annuity Rates

In January 2009, the board of the American Council on Gift Annuities (ACGA) embarked on an in-depth review of the methodology it employs in arriving at its schedule of suggested gift annuity rates using outside actuarial advisors. At its March 30, 2009 meeting the ACGA board received a report from its Rates Committee on the status of the review and the initial commentary and recommendations received from the outside advisors. The Rates Committee will complete its work on this project in the next 6 to 8 weeks, and expects to make a recommendation to the ACGA board in mid-June regarding any suggested changes in the methodology by which rates are determined as well as any changes in the suggested rates. The board will then vote and make an announcement about suggested gift annuity rates on or before July 1, 2009.

***Mark your calendars now for our August 12th chapter meeting:
Donor Centered Fundraising presented by the prestigious
Penelope Burk!***



Member Spotlight: Danielle Easton
Development Director, Crittenton Centers



What are you responsible for at Crittenton Centers?

Like most Development staff in a relatively small agency, I wear many hats. I am primarily responsible for all monetary donations, oversee Crittenton's Development Committee and work with Special Events, including Kids' Day, the Stocking Stuffer Store and our newest fundraiser, Festival of Trees. I am also responsible for marketing and communications.

What impresses you the most about Crittenton?

The people – staff, volunteers, the Board, donors, the kids. Everyone is so committed to the mission. We have a couple of volunteers that are here five days a week, all day long! Their passion is inspiring.

How did you get your start in fundraising?

After graduating Illinois State University in 2002, I got my first "real" job at Lakeview Museum as Membership Director. In 2006, I was promoted to Development Officer, a position I held until I came to Crittenton Centers in August 2008. I never thought I would end up in the not-for-profit world, but I fell in love with it. After almost six years in the field, it still amazes me how philanthropic some people are.

What is the best thing about your job?

I love working for an organization with such deep roots in the community. Crittenton has such a rich history and truly is a worthy cause. As a mother, child abuse and neglect prevention is very important to me. I get to work and interact with great people everyday. Plus, if I'm having a bad day, I can always go hold a baby or play with the kids!

How long have you been involved with AFP and what do you like about it?

I have had the opportunity to attend a few AFP meetings and seminars over the past five years. In October 2008, I became a member after I was awarded the C. Wilson Schroeder Membership Scholarship. I love attending meetings and networking with other people in the development field. AFP meetings have such great, timely topics – I always come away feeling energized.

What is the best career advice you have ever received?

Jim Richerson, President and CEO of Lakeview Museum, told me early on that you should never be afraid to ask for money – the worst they can say is no. I think about that advice often.

What do you hope to do in your career that you have not yet done?

Where do I begin?! For starters, I would love to be able to focus on planned giving and building the endowment. Endowments are such an important safety net for not-for-profits – I would love to be part of growing something that could provide financial independence for an organization.

Describe your perfect day.

Upon arriving at work, I grab a large, strong cup of coffee (which is already made) and head to my office to check my e-mail and voicemail. I have a message that says "My name is Mr. John Smith and I heard about the great work Crittenton does. I am mailing you a check for \$250,000. Keep up the good work." In awe, I call a couple of close, major donors to tell them the news; they feel inspired and each donate \$250,000 as well. Thinking that the day couldn't get any better, one donor calls me back – he has good news – his company matches! The boss is so impressed with my million dollar day, she gives me the rest of the day off. I go home and take a nap.

Reflections on the International Conference

Thank you, thank you, thank you to the Central Illinois Chapter of AFP for making it possible for me to attend the International Conference in NOLA as a Chamberlain Scholar! I had a great time, learned a ton, and I came back reinvigorated. I believe that any conference, workshop, or educational session serves its purpose when the attendee is actually excited to get back into the office and attack their work with renewed excitement.

I thoroughly enjoyed hearing Chris Gardner (the subject of *The Pursuit of Happyness* – good movie, better book). I was sorry when he finished because I could have listened to him for hours. I believe that he got where he is in life not by chance but by hard work. I also loved the Doris Kearns Goodwin keynote address. I am not a history buff, but I think she converted all 3000 of us that day as she explained the particular qualities that Abraham Lincoln possessed that made him a good leader. She was also a fascinating speaker and really packed a lot of information in her allotted time.

The educational sessions were fabulous. I attended sessions focused on major donors across the generations, new and traditional media outlets, planned giving, capital campaigns, grant writing, blogging, how to become a CFRE, and fundraising in bleak economic times. In other words, I learned about a little bit of everything! I personally enjoy in-depth sessions that really go into detail about the subject rather than basic overviews. For the most part, I lucked out in that regard with the sessions I chose. The blogging session was especially interesting because the speaker discussed (in great detail) about how to start your organization's blog and what the heck you should be blogging about! Now that I'm back in my office, I can't wait to start TCRC's blog, check out some new grant websites, learn more about planned giving, and get my CFRE (2009 is going to be my year!).

I have to be honest, though...I didn't spend my entire time in New Orleans just thinking about fundraising. New Orleans was already one of my favorite cities on the planet, and this visit confirmed that it always will be. We hit the French Quarter each night and ate WELL. Naturally, we washed our food down with some delicious beverages! I really enjoyed my entire experience. The only way it could've been better is if it had lasted another few days! Thanks again!

-Kimberly Weeks

Development Assistant, TCRC, Inc.

The 46th AFP International Conference on Fundraising held in New Orleans, Louisiana, offered me a tremendous learning experience. From the expo to the education sessions to the incredible life stories of the keynote speakers, the conference provided an array of learning opportunities. I attended sessions such as: Transform Friends of Your Event into Agency Family, Marketing That Matters: 10 Practices that Profit Your Organization and Change the World, Writing to Win! Grant Writing Strategies for Success, and 50 Asks in 50 Weeks: How to Jump-Start Your Small Development Office.

The most creative session was "Crafting Your Fundraising Story" with Doug Stevenson of Story Theater International in Colorado Springs. His session focused on strategic storytelling. All too often, we focus on the tangibles... the programs, the facilities, the number of people served, and so on. Although many of us can tell this side of the story without missing a beat, we forget to look at things from the donor's point of view or to craft our story to their needs.

According to Stevenson, a key element of crafting your story is using a Phrase That Pays, which is a succinct summary of your story and a call to action. The phrases should be short and sweet, musical and rhythmic, starts with a verb when possible. Some examples are: Give People a Chance to Give, Walk Your Talk, Make a Difference, Ask Questions, Take Your Time, Call Your Doctor, Answer the Call, and Seize the Moment.

As a novice fundraising professional, the conference was an essential building block. I left New Orleans with many new ideas that will help both me and my organization grow. On behalf of the Mental Health Association of Illinois Valley, Inc., I would like to say thank you for awarding me a conference scholarship and... Mind Your Health!

-Priscilla Slaughter,

Development Coordinator, Mental Health Association of Illinois Valley