

Greater Cleveland Chapter News



Greater Cleveland Chapter Again Recognized As Ten Star Chapter

During the all-metro meeting to be held at the AFP International Conference in Dallas, the Greater Cleveland Chapter will be amongst the AFP chapters that will be recognized for achieving Ten Star status in 2006.

The Chapter Ten Star Award honors those chapters who have accomplished many of the key objectives outlined in AFPI's Strategic Plan. This plan is the long-range blueprint for organizational growth and success. For the strategic plan to be effective, it must be implemented through the chapters. The award encourages chapters to perform specific activities designed to increase professionalism within fundraising and public awareness of the importance of philanthropy.

In order to qualify for this award, our chapter had to accomplish 10 of 15 chapter goals published by International Headquarters. Goals that were accomplished during 2006 included the following required goals:

- Meeting AFPI deadlines for the Chapter Leadership Form and Chapter Accord (a record of the chapter's accomplishments for the previous year).
- Holding an event or activity focused on the importance of ethics in fundraising.
- Submitting at least one nomination in 2006 to the AFP Awards for Philanthropy.
- Other goals that our chapter accomplished during the year included:
- Holding at least one event focused on member recruitment or retention.
- Sponsoring the Essentials of Fundraising series.
- Sending delegates to the 2006 Delegate Assembly meeting.
- Holding National Philanthropy Day and presenting local awards.
- Achieving our Every Member Campaign goal of \$4500.
- Communicating with our members consistently throughout the year.
- Holding an event or activity designed to encourage diversity.
- Promoting legislation and/or regulations related to philanthropy.
- Chapter Awards modeled AFPI Awards.

Achieving Ten Star status means that your Greater Cleveland Chapter is strong, helping to build the profession and organization, meeting the goals of AFPI, and meeting minimum standards as a chapter. As a Ten Star Chapter we are also qualified for cash awards from AFPI for membership growth and retention and free programming.

Upcoming Events

April 10, 2007

Audioconference

*"The Development Plan -
The Foundation of Success"*

Linda Lysakowski, ACFRE

April 19, 2007

Luncheon

*"Raising Charitable Support
Through the Internet and Technology"*

Jacquie Skrzypiec, Joe Borowski and Gil Brucken

May 2, 2007

Breakfast Roundtable

*"Building Fundraising Collaborations
Among Nonprofit Organizations"*

Carol Willen, Lakeland Community College
Nonprofit and Public Service Center

May 3, 2007

Audioconference

*"Involving Your Board in Fundraising,
Even When They Aren't Perfect"*

Sandra Renner, CFRE

May 17, 2007

Luncheon

"Conducting a Feasibility Study"

June 6, 2007

Roundtable

"Talking with Your Older Donors"

June 7, 2007

Audioconference

*"A Planned Giving Program
Anyone Can Create"*

Alexander Macnab, FAHP, CFRE

June 21, 2007

Luncheon

*"Trends in Foundation Funding of
Non-Profit Organizations"*

September 5, 2007

Breakfast Roundtable

*"Database Analysis & Working
With List Brokers"*

Barry Leaventon, Precision Printing

September 20, 2007

Luncheon

*"Soliciting Major Gifts: A How-To
Primer for Fundraising Professionals"*

Doug Allinger, President,
Allinger & Company, Inc. –
Fundraising Consultants

LETTER FROM THE PRESIDENT



Dear Friends:

It is hard to believe that spring is right around the corner. It seems like it was just yesterday when we were all celebrating the outstanding accomplishments of our NPD Award winners at our annual luncheon in November.

It is indeed my pleasure to serve as your President for the next two years. AFP has been such a motivating influence on my professional career and I look forward to meeting you throughout the year at our various events. I always welcome your comments, suggestions and ideas as we move forward.

One of the reasons I accepted the position as President of our AFP Chapter, was the dynamic, talented and committed professionals we have at the helm of our various Board Leadership Committees. We believe in working as a team to make sure that your needs as members are being met.

I would like to thank these committed individuals for agreeing to serve on the Executive Committee this year and for leading their various teams. As Treasurer, **William Mountcastle**, will closely monitor our finances and Secretary, **Dianne Dillon** will carefully document our many meetings. VP of External Relations, **William Kimball**, will guide our efforts in the areas of Communications (including Website) and Governmental Affairs. **Lauren Steiner**, as VP of Professional Development, will provide the direction in the areas of Programming and Professional Member Development. As VP of Membership, **Michael Parry** will work to recruit and retain membership levels and to make sure that member expectations of our association are being achieved and finally, **Karen Kannenberg**, as VP of Resource Development, will work closely with those revenue generating programs, specifically National Philanthropy Day. I would be totally remiss if I also did not mention the outstanding leadership of **Constance Sipple**, who agreed to step in as Chair of NPD and is off to a tremendous start planning a top notch event again this year and also to **Debbie Miller**, immediate past president for making this a seamless transition. I am deeply indebted to these individuals and look forward to working with them in the upcoming year!

I look forward to seeing you at our upcoming events!

John F. Garofalo

Welcome New Members

Pamela P. Boggs

North American Menopause Society
440-442-7658
pam@menopause.org

Renee Burslem

Lake Erie Nature & Science Center
440-871-2900 x206
renee@lensc.org

Sean Chamberlin

Rainbow Babies & Children's Hospital
216-983-2210
sean.chamberlin@uhhospitals.org

Charlene A. Coughlin

United Cerebral Palsy of
Greater Cleveland
216-791-8363 x 232
ccoughlin@ucpcleveland.org

Ryan R. Cross

Rainbow Babies & Children's Hospital
216-983-2211
ryan.cross@uhhospitals.org

Steve Ehretsman

Rainbow Babies & Children's Hospital
216-983-2214
steve.ehretsman@uhhospitals.org

Beth Ann Gaglione

University Settlement
216-641-8948 x225
bgaglione@universitysettlement.net

Carolyn Gilbert

University Hospitals
216-983-2242
carolyn.gilbert@Uhhospitals.org

Char Glatley

Nature Center at Shaker Lakes
216-321-5935 x 242
glatley@shakerlakes.org

AFP Vision Statement

The Association of Fundraising Professionals (AFP) Greater Cleveland Chapter is the recognized leader for advancing philanthropy by empowering fundraisers to serve throughout the region.

Welcome New Members

Johanna Hess
216-361-9920
johannahess@hotmail.com

Sharon S. McGuire
Shoes & Clothes for Kids
216-881-7463
smcguire@sc4k.org

Judy Mindicino
Kennedy Catholic High School
724-346-5531
jmindicino@kennedy-catholic.org

Rev. Christopher L. Otten
Building Hope in the City
ChristopherOtten@aol.com

Susan F. Piatt
Notre Dame College
216-373-5234
spiatt@ndc.edu

Judith W. Ross
Cleveland Public Theatre
216-631-2727 x211
jross@cptonline.org

Jean Thomas
City Year Cleveland
216-373-3413
jthomas@cityyear.org

Erik Michael Tomalis
Sigma Nu Educational Foundation
216-588-1421
erik.tomalis@sigmanu.org

AFP Foundation for Philanthropy

Deborah S. Miller, CFRE, Chair, Every Member Campaign

The mission of the AFP Foundation for Philanthropy is to enhance philanthropy and volunteerism through programs of education, research and service that benefit those that lead, serve and support nonprofit institutions. The goal of the AFP Foundation is to generate the resources to fund AFP strategic initiatives that advance ethical and effective fundraising.

Each year, our chapter holds an Every Member Campaign to support the AFP Foundation for Philanthropy. The goal for 2007 is to raise \$1.2 million for the foundation. Our chapter's goal is merely \$4,325 from our members.

The Foundation supports those of us in the profession. Specifically, gifts support the following:

- Scholarships, such as the Chamberlain scholarship to the International Conference that we give to a member each year,
- Education, including lectures at the international conference and AFP's Ready Reference Series
- Research, including grants to members conducting research in philanthropy
- Strategic Initiatives, including AFP's Youth in Philanthropy Program, and
- Chapter Partnerships, including matching grants to chapters, such as the grant we will receive for the 2006 campaign. Our matching grant from the Foundation also helps provide funds toward the scholarships that our chapter offers to our members.

Our chapter will be eligible for a grant of 25% of all gifts made to the campaign, as long as we reach our goal of \$4,325. This goal must be met in gifts and paid pledges only to be eligible for the grant, unpaid pledges will not be taken into consideration as they have been in the past.

In the next few months, you will receive an email solicitation from AFP International, and possibly a follow-up phone call, inviting you to support the AFP Foundation for Philanthropy. I encourage you to consider supporting our profession, our chapter, and your professional development by making a gift. It is my goal to increase our chapters participation in the campaign, as well as surpass our goal.

2006 Campaign Statistics

Goal:.....\$4500
Amount raised in pledges, gifts, and paid pledges:\$4,990
Amount raised in gifts and paid pledges:.....\$4,325
Pledge fulfillment rate:..... 79% of all gifts pledged
Members fulfilling pledges in full:74%
Percent of members from our chapter who supported the 2006 campaign: ...25%
Grant we qualified for:\$1,166.25



POLICY WATCH

Submitted William J. Mountcastle

Proposed Postage Rate Increase Could Have Major Impact on Charities

The U.S. Postal Service (USPS) has proposed rate increases and new rules for mail preparation. If approved, the proposals will go into effect in the spring of 2007 and will force some charities to either change their mailings or pay higher costs for them. Among the proposed changes is a new mailing category, called Non-Flat Machinable Mail (NFM), for any mail that cannot run on USPS automation equipment. This would include charity mail pieces that have parcel-like characteristics, such as rigid pieces that are of uneven thickness and aren't flexible (envelopes containing logoed promotional products, such as pens, stickers, greeting cards, bookmarks). According to the Direct Mail Association Nonprofit Federation, the proposal could subject charities to mailing rate increases of 100 to 400 percent. Certainly any hike of that nature would make us have to look at how we are going to send out our periodicals and think twice about what it is we are mailing. If the USPS board of governors approves and finalizes the proposal, all rectangular Nonprofit Standard mail could be treated as either an NFM or as a parcel, meaning much higher rates for these pieces starting in May 2007.

Our charitable missions rely upon the mail to raise funds and disseminate information that serves our communities. Every dollar saved from postal rate increases is a dollar spent on the mission of our nonprofit organization. To find out more information, we encourage you to visit www.usps.com, www.afpnet.org or send information requests to paffairs@afpnet.org.

National Philanthropy Day®

Leadership Award Nominations

Looking for an outstanding way to recognize a donor who has significantly impacted your organization? A special volunteer with remarkable fundraising skills? An inspiring student? AFP Greater Cleveland Chapter's annual National Philanthropy Day® awards offer a unique way for your organization to showcase those who are the most deserving.

This year, a number of changes that have been adopted to encourage your participation, reflect our community's history of philanthropy, and ensure the integrity of the process:

- Nominations must be made by an AFP Greater Cleveland Chapter member in good standing.
- A point system has been established as the primary means for selection to encourage the participation of organizations of all sizes.
- Candidates who have previously won an award may be nominated in 2007 if they have not won an award in any category in the past five years.
- No more than three nominating organizations will be recognized in this year's NPD promotional materials. In the case of multiple nominators, the first three nominations (based on postmark) will receive recognition—including video participation. Additional nominators will be considered "supporters," but will not receive the benefits of full recognition.
- Committee members affiliated with nominations will not participate in the selection process.
- In accepting the award, winners must commit to attend NPD.

Nominations will be accepted until April 30, 2007 for the following awards which will be presented at National Philanthropy Day® on November 2, 2007:

Leadership Award - Corporate

Leadership Award - Foundation

Leadership Award - Philanthropist

Outstanding Fund Raising Volunteer Award

Youth in Philanthropy Award

Nomination forms are available at the AFP Cleveland website www.afpcleveland.org

AFP members may submit nominations for all five awards by printing off and submitting the nomination forms below. Forms can also be obtained by contacting Susan Austin Carney, chapter administrator, at 216.696.1613 or admin@afpcleveland.org.

The Essentials of Fundraising Series

Basic Training for Fundraising Professionals

Those participants who complete Basic Training (all five modules) will receive a *Certificate of Completion*.

Each Course Module will be taught by experienced professionals in each area.

Module 1: May 11, 2007

Corporate and Foundation Grantseeking

Although 85 percent of U.S. contributions to nonprofit organizations comes from individuals, foundations and corporations are important complements to fundraising efforts. This course will instruct participants on how to fund their unique activities as well as impart effective grant writing and reporting skills. You will also learn how to identify foundations willing to fund your organization's activities. New for this year, an optional afternoon segment (1:30 pm - 3:30pm) will take you on a guided tour of the Foundation Center library and its comprehensive resources. Presented by: Cynthia Glunt Bailie, Director, The Foundation Center, Cleveland and Michael J. Parry, CFRE, Senior Manager, Corporate and Foundation Support, American Red Cross, Greater Cleveland Chapter

Module 2: June 1, 2007

Development 101 and Special Events

This course focuses on the information and skills needed to establish an integrated fundraising program. During this session, participants will learn how to identify potential funding sources and how different types of fundraising fit into the bigger picture. This course will provide methods for assessing your institution's readiness, defining your case, developing resources and establishing basic policies and procedures needed to manage a solid fundraising program. Additionally, this course addresses the importance of special events and how they can be used as an effective entry point for donors into an organization. Presented by: Karen Kannenber, CFRE, Manager of Gift and Donor Development, Cleveland Metroparks and Constance S. Sipple, CFRE, President, Profile Solutions Inc.

Module 3: / June 8, 2007

Annual Giving

This course is designed to help you discover core constituencies and turn them into continuous annual donors. Knowing the range of techniques available will help you design a plan and develop strategies to move donors on the path of lifetime commitment to your organization. Presented by: Arlene Bourisseau, Director of Development, Saint Ignatius High School and Deborah S. Miller, CFRE, Director of Development, Cleveland Hearing and Speech Center

Module 4: / June 15, 2007

Individual Major Gift Fundraising

This course explains how to engage donors at a deeper level so that their annual giving reaches maximum financial capacity. It will provide development officers, staff and board members of nonprofit organizations a framework for developing a successful individual major gifts program. Participants will learn how to lay the foundation of necessary attitudes, skills, insight and knowledge. Presented by: Kristen Broadbent, CFRE, Director, Lakewood Hospital Foundation and Susan Ertle, Director of Development, West Side Catholic Center

Module 5: / June 22, 2007

Board and Volunteer Development

This course is designed to show you how to work with and energize volunteers to help your organization raise money efficiently and effectively. Participants also will learn how to recruit the best board and volunteer fundraisers as well as how to evaluate your current team. Presented by: Deborah Osgood, Director of Development and Marketing, Achievement Centers for Children and Margie Wheeler, community board member and consultant to foundations and nonprofits

Workshop Location:

The Cleveland Foundation
1422 Euclid Avenue, Suite 1300, Cleveland, Ohio 44115

All workshops are 9:00 a.m. until 12:00 p.m. Please plan to arrive at 8:30 a.m. for registration and continental breakfast.

Check each workshop you wish to register for.

- Module 1: Corporate and Foundation Grantseeking May 11, 2007
- Module 2: Development 101 and Special Events June 1, 2007
- Module 3: Annual Giving June 8, 2007
- Module 4: Individual Major Gifts Fundraising June 15, 2007
- Module 5: Board and Volunteer Development June 22, 2007

AFP Member: Yes AFP Member # _____ No

AFP Membership: JOIN and SAVE! Join AFP and save \$20 off each workshop fee! Join online at www.afpnet.org or call 800-666-3863 for more information.

To register:

Fax: Complete form with credit card information and fax to (216) 696-2582 Or Mail To: AFP, Attn: Susan Carney, 1120 Chester Avenue, Cleveland, OH 44114

NAME _____

TITLE _____

ORGANIZATION _____

ADDRESS _____

CITY/ STATE ZIP/ CODE _____

PHONE FAX EMAIL _____

Fees:

Member: \$55 per session / Non-member: \$75 per session

ENROLL IN ALL FIVE AND GET ONE FREE!

Five sessions: Member: \$220 / Non-member: \$300

You may share your Essentials registration with other staff members. If a different individual is attending a session, please phone (216-696-1613) or fax (216-696-2582) the attendee's name by the Friday before each event.

**** To guarantee workshop registration, payment must accompany registration.**

TOTAL \$ _____

Method of payment (check one):

- Check enclosed (made payable to AFP)
- MasterCard Visa Am Ex

CARD NUMBER _____

EXPIRATION DATE _____

SIGNATURE _____

Space is limited! We recommend you register early.

Upcoming Events

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*"The Development Plan -
The Foundation of Success"*

Linda Lysakowski, ACFRE

April 19, 2007

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Primer for Fundraising Professionals"*

Doug Allinger, President,
Allinger & Company, Inc. –
Fundraising Consultants

Professional Development Opportunities

Northern Ohio Planned Giving Council Planned Giving Day - Navigating Change!

May 10, 2007 - Hilton East

Are you new to planned giving or are you a seasoned planned giving professional? Would you like focused insight on specific gift vehicles and planned giving trends? Do you have colleagues or board members that you would like to expose to planned giving? If so, NOPGC's annual Planned Giving Day has something to benefit everyone in the field.

Planned Giving Day 2007 will focus on ways to navigate the changing trends and will update you on developments in the industry for organizations of all sizes and scope. This all-day event is geared toward advanced professionals and those new to the field. Lunch is a great time to network with planned giving colleagues. Noted national planned giving specialist Robert Sharpe will present the keynote address and Michael Horvitz (recipient of AFP's Philanthropist Leadership Award in 2002) will discuss the future of philanthropy in Northern Ohio during lunch.

For information on Planned Giving Day, visit nopgc.org or call 216-696-8822.

AFP Announces 2007 Scholarships Guidelines

2008 AFP International Conference Scholarships: Deadline September 1, 2007

- 3 \$700 member scholarships available
- 1 Chamberlain Scholarship available to an active AFP member with 5 or more years fundraising experience. The applicants must never have attended the International AFP Conference previously.

2007/08 Membership Scholarships:

Deadline July 1, 2007

- 10 half price scholarships to become an AFP member
- Two \$250 CFRE scholarships - Deadline July 1, 2007
For those planning to register and take the CFRE exam within one year.
- Five \$50 scholarships (credits) for people who sign up for 3 or more of the *Essentials* Program - Deadline will be advertised in conjunction with *Essentials* registration information.

For application information, please check the AFP website, www.afpcleveland.org or contact Scholarship Chair Stacy Caddey, CFRE at scaddey@aol.com.

Breakfast Roundtables are hosted by the American Red Cross Greater Cleveland Chapter, 3747 Euclid Ave. Registration begins at 7:45 am, program 8-9 am.

Audioconferences are hosted by Recovery Resources, 3950 Chester Avenue from 1:00 – 2:30 pm.

Luncheons will be held at The Play House Club, 8501 Carnegie Avenue. Registration begins at 11:30 am, presentations are from 12:00 – 1:30 pm.

2007 Greater Cleveland Chapter Officers

John F. Garofalo, CFRE
President
University Hospitals
john.garofalo@UHhospitals.org
216-983-2205

William J. Kimball, D.Min., CFRE
Vice President – External Relations
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wkimball@adelphia.net
216-570-0100

Michael J. Parry, CFRE
Vice President - Membership
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Greater Cleveland Chapter
parrym@redcross-cleveland.org
216-431-3275

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Vice President – Professional
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lauren.steiner@achievementctr.org
216-292-9700 x235

Karen J. Kannenberg, CFRE
Vice President – Resource Development
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kjk@clevelandmetroparks.com
216-635-3217

Dianne M. Dillon
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ddillon@societyhelps.org
440-352-8993 x307

William J. Mountcastle
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University Hospitals
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216-983-0707

Deborah S. Miller, CFRE
Immediate Past President
Cleveland Hearing & Speech Center
dmiller@chsc.org
216-231-8787 x267

Directors

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HELP Foundation
jackerman@helpfoundationinc.org
216-432-4810

Nancy J. Ackley, CFRE
Capital Campaign Consultant
nancy.ackley@ecunet.org
216-521-0241

Cynthia Glunt Bailie
The Foundation Center – Cleveland
CGB@fdncenter.org
216-861-1934

Arlene Bourisseau
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aboutourisseau@ignatius.edu
216-281-2363

Beth Brown
The Holden Arboretum
bbrown@holdenarb.org
440-602-3802

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Fund Raising Counsel
scaddey@aol.com
440-899-7678

Carol L. Carbary, CFRE
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Anne Marie Cronin
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annemarie.cronin@case.edu
216-368-2311

Susan L. Ertle
Wesleyan Senior Living
sertle@villageliving.org
440-284-9387

Douglas Knop
The Benjamin Rose Institute
dknoop@benrose.org
216-373-1607

Nikki C. Mohar
Ohio Physicians Health Program
nmohar@hotmail.com
216-509-8667

Ann Marie Nocella, CFRE
The Lakeside Association
amlnocella@lakesideohio.com
1-866-952-5374

Alex S. Petrus, CFRE
Berea Children's Home & Family Services
apetrus@bchfs.org
440-260-8341

Constance S. Sipple, CFRE
Vice President – External Relations
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Vicki J. Stouffer, MBA, CFRE
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Mitchell Wasserman
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Julie Weagraff
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admin@afpcleveland.org
216-696-1613



**2005
Ten Star AFP Chapter**

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www.afpcleveland.org

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FIRST CLASS

The AFP Greater Cleveland Chapter newsletter is a service to members and is published throughout the program year.

For the latest, up-to-date information, check our web site: www.afpcleveland.org. Job listings will be posted on the web only.

“Raising Charitable Support Through the Internet and Technology”

Thursday, April 19, 2007

11:30 a.m. to 1:30 p.m.

Jacque Skrzypiec, Joe Borowski and Gil Brucken

Cleveland Playhouse Club

\$25 (\$40 non-members) including lunch
(chicken or vegetarian)

Registration Deadline: Friday, April 13, 2007

Name _____

Phone _____

Organization _____

E-Mail _____

Address _____

Total Enclosed \$ _____

Make checks payable to Association of Fundraising Professionals.

Charge my MasterCard Visa American Express

Acct# _____

Exp. _____

Total Enclosed \$ _____

I prefer _____ vegetarian option(s) with this reservation.

“Conducting a Feasibility Study”

Thursday, May 17, 2007

11:30 a.m. to 1:30 p.m.

Speaker: Elliott Oshry, Ketchum Consulting

Cleveland Playhouse Club

\$25 (\$40 non-members) including lunch
(chicken or vegetarian)

Registration Deadline: Friday, May 11, 2007

Name _____

Phone _____

Organization _____

E-Mail _____

Address _____

Total Enclosed \$ _____

Make checks payable to Association of Fundraising Professionals.

Charge my MasterCard Visa American Express

Acct# _____

Exp. _____

Total Enclosed \$ _____

I prefer _____ vegetarian option(s) with this reservation.

Do not send credit card information via e-mail. Charges will appear as “Assoc. of Fundraising Pros.” on your statement.

No-shows will be billed. **To Register: Mail** reservation with payment to:

AFP, 1120 Chester Ave., Suite 470, Cleveland, OH 44114-3514.

Call: 216-696-1613 / **Fax** to 216-696-2582. **Register online:** afpcleveland.org