



**2006  
Ten Star AFP Chapter**

## Greater Cleveland Chapter News

# 24<sup>th</sup> Annual National Philanthropy<sup>®</sup> Day

Recognizing the accomplishments of our colleagues, the generosity of donors and the spirit of philanthropy throughout our community, AFP Greater Cleveland presents our 24<sup>th</sup> Annual National Philanthropy Day<sup>®</sup> celebration! Held this year on Friday, November 2<sup>nd</sup> at Signature at LaCentre in Westlake, please join us as we present awards to honor the good work and giving hearts that have made such a positive impact on our communities, the nation and the world.

We are proud to have Signature Sponsorship of this year's event from The Cleveland Clinic Foundation and University Hospitals and Rainbow Babies & Children's Hospital. For information on sponsorship opportunities please see our website at [afpcleveland.org](http://afpcleveland.org).

The National Philanthropy Day<sup>®</sup> Celebration starts bright and early with

a program of workshops for fundraising and non-profit professionals. This year's workshop sessions have three tracks focusing on Annual Giving, Major Gifts, and Careers in Fundraising to provide information and inspiration for professionals at all levels. For a complete workshop agenda and session descriptions please visit [afpcleveland.org](http://afpcleveland.org).

You will be receiving an invitation and workshop registration packet in September. Workshop registration with Luncheon attendance is \$90 for AFP members and \$125 for non-members. To join us for lunch without attending the morning workshop sessions is \$50 for AFP members and \$60 for non-members. If you'd like to attend the workshops but cannot stay for lunch the cost is \$40 for AFP members and \$65 for non-members. An eight-person table for the luncheon is \$600 and includes the

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### Upcoming Events

September 5th

Breakfast Roundtable

*"What Does it Mean to be a CFRE, and what do you need to become one?"*

William Kimball, CFRE

John Garafolo, CFRE

Elizabeth Vernick, CFRE

September 20th

Luncheon

*"The Existential Joys of Fundraising"*

Daniel Mansoor, GoodWorks Group

October 3rd

Breakfast Roundtable

*"Professional Development and Networking"*

October 5th

Luncheon

Joint Program with NOPGC

*"Thanking our Donors"*

October 18th

Luncheon

Senior Leadership Forum

*"Recruiting, Training and Retaining Excellent Development Staff"* Panel Discussion

November 2nd

**National Philanthropy Day**

Signature at LaCentre

Workshops:

*"Annual Giving as the Foundation of Your Development Program"*

*"Voices of Experience"*

*"Soliciting Major Gifts"*

*"Soliciting Major Gifts – An Interactive "*

*"Career Advancement through Nonprofit Education"*

*"Can Your Development Director Be Your Next Executive Director?"*

December 7th

AFPGC Annual Meeting

January 2nd

Breakfast Roundtable

*"Accessing Local Research Resources in Making Your Case for Support"*

January 17th

Luncheon

*"Branding Your Organization and Communicating with Donors"*

Michelle Wood

### The following awards will be presented at the awards Luncheon:



Martha Shierson Harding



Norma Lerner



THE  
ELISABETH  
SEVERANCE  
PRENTISS  
FOUNDATION



Karoline Evin McMullen

**Outstanding Fundraising Volunteer Award: Martha Shierson Harding**

Nominated by: *Planned Parenthood of Greater Cleveland*

**Philanthropist Leadership Award: Norma Lerner**

Nominated by: *The Cleveland Clinic*

**Corporate Leadership Award: The Lubrizon Corporation**

Nominated by: *University Hospitals*

**Foundation Leadership Award:**

**The Elisabeth Severance Prentiss Foundation**

Nominated by: *The Achievement Centers for Children, Cleveland Hearing & Speech Center, and Frances Payne Bolton School of Nursing*

**Youth in Philanthropy Award: Karoline Evin McMullen**

Nominated by: *Hawken School*

## LETTER FROM THE PRESIDENT



Dear Friends:

I hope all of you are enjoying a safe and healthy summer!

The first six months have been very busy for all of us involved with AFP in Greater Cleveland. I hope you had the opportunity to participate in the many roundtable, luncheon and audio conferences that we offered. We have listened to our membership who asked for more learning opportunities on key topics that address all levels of fundraising. Key learning opportunities were

offered for those entering the wonderful world of development for the first time as well as for our most seasoned professionals with years and years of experience.

I am also pleased to see AFP, Greater Cleveland Chapter partnering with other organizations from throughout the area to enhance our image and to assist us in our vision of being the recognized leader for advancing philanthropy by empowering fundraisers to serve throughout the region. I am a firm believer in the power of partnerships and collaboration! They make us stronger and get our voice out into the community.

These partnerships include a great relationship we have developed with Barb Galbincea, the philanthropy reporter for *The Plain Dealer*. Barb has been instrumental in promoting and creating reader awareness for many non profits throughout the area and we look forward to being a source of information for her in the future.

In addition, we are pleased to be partnering with Corporate College, a Division of Cuyahoga Community College. In the fall, AFP and Corporate College will join forces to offer our popular education series, Essentials of Fundraising, designed to help cover the basics of fundraising for development professionals and volunteers. More information is included in this newsletter.

Finally, we are thrilled to be in continued discussion with The Foundation Center and Business Volunteers Unlimited to work collaboratively to help foster our organizations.

Of course, I did not mention all of the groups that we collaborate with but I look forward to continuing to have dialogue with these and others to help promote and support our profession.

Have an enjoyable rest of the summer and look forward to seeing you soon!

John F. Garofalo

## Welcome New Members

**Frances L. Anderson Mack**

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## 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

**Jillian Frazier**

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# AFP Foundation for Philanthropy

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

Each year, the AFP Foundation for Philanthropy asks each AFP member to contribute to The Foundation through the Every Member Campaign (EMC). The dollars raised through this campaign support the training of professional fundraisers through scholarships and educational sessions, such as at AFP's International Conference, research in the field of philanthropy, and AFP's strategic initiatives.

Chapters that meet their EMC goal will receive a chapter partnership grant equivalent to 25% of the dollars raised. Funds raised from the Every Member Campaign do not pay salaries, the activities of the political action committee nor operating expenses.

Our chapter goal is to raise \$4,325 to benefit the AFP Foundation for Philanthropy. So far, 100% of your board of directors has contributed to this campaign, in addition to several members. We have raised over half of our goal! If we reach or exceed our goal in paid gifts, our chapter will receive a

grant of at least \$1081 which will be used toward chapter scholarships.

In the coming weeks, Advantage Consulting will be contacting members of AFP throughout the United States asking them to make a gift or pledge to this year's campaign. When you receive this phone call, I encourage you to support this important campaign with your pledge or gift.

If you wish to simply make a gift online, you can do so by going to <http://www.afpnet.org>. Click Make a Gift in the green Quicklinks. You will need to have your membership number and password handy.

If you have any questions, please don't hesitate to call me at 216-231-8787 x267 or contact me via email at [dmiller@chsc.org](mailto:dmiller@chsc.org).

Thank you for your consideration and participation in this year's Every Member Campaign. Your support helps provide professional development opportunities for all of our members.

## In Memory: Peggy Wallace Bender

AFP notes the tragic passing of Peggy Wallace Bender on August 5, 2007, at the age of 50. Active in AFP for many years, she was recognized as the Outstanding Fundraising Executive in 1997 by the professional communities of AFP, NOPGC, and OCFRE in Cleveland. Peggy was a leader in planned giving, one of the founding members and Past Presidents of the Northern Ohio Planned Giving Council. She co-chaired the establishment of the "Leave a Legacy" program in Northern Ohio, and served as a member of the Board and the Executive Committee of the National Committee on Planned Giving during the late 1990's.

She was instrumental in launching over 150 new planned giving programs in non-profit organizations, and was actively involved as a lecturer and teacher. She gave over 400 workshops and seminars on planned giving. Her consulting firm, Strategies for Planned Giving, served organizations throughout the U.S. Bill Hilyard at Playhouse Square was one of her long-time clients. Bill noted that Peggy "was a trusted colleague and mentor to many planned giving professionals throughout the region and beyond. Peggy's enthusiasm, energy and in-depth knowledge provided the spark that translated into success for all those she touched." We are all better planned giving professionals for having worked with Peggy. Contributions may be made in her memory to AFP Greater Cleveland.

# Special Notice for AFP Members Fall 2007

## The Essentials of Fundraising Series

In partnership with Corporate College, the Association of Fundraising Professionals (AFP) Greater Cleveland Chapter is pleased to present The Essentials of Fundraising, a five-course series. Designed and presented by experienced fundraising professionals, the curriculum focuses on the real world needs and challenges nonprofit organizations face every day. It provides best practices and essential tactics of fundraising theory and practice. Students completing all five modules will receive a certification of completion from AFP. Each session is taught by AFP members.

### Essentials of Fundraising... again a big hit among attendees

"I wish you would turn this into a whole day session! These speakers were amazing! I really learned a lot about how to set up an annual fund. Please keep these speakers for the future!"

"Speakers were excellent. Very knowledgeable about the topic. Real life situations and solutions were very helpful."

"I will share this information with our Board so that we can have an open discussion about our fundraising efforts. We may need to re-evaluate a lot that we do...this program is providing essential information to begin the discussion."

"I am responsible for marketing for my organization and not directly responsible for fundraising. However, I am new to the nonprofit sector so I believe this series will provide a good overview for me. Both speakers were excellent."

These are a few random comments from the evaluations for the recently completed Essentials of Fundraising Series, which concluded in June. We would like to extend our most sincere appreciation to our faculty for the series for the time and effort they put into making the sessions applicable and knowledgeable to all those who attended. They include *Michael Parry, Cynthia Glunt Bailie, Connie Sipple, Karen Kannenberg, Debbie Miller, Arlene Bourisseau, Kristen Broadbent, Susan Ertle, Deborah Osgood and Margie Wheeler*. A special thanks also to Lisa Sierk, who spearheaded the organization of this Essential Series and to Susan Austin Carney, our Chapter Administrator, for making sure all details were handled before, during and after the sessions! If you have never attended one of the Essential sessions, please consider attending one in the future. Not only for the information that is being presented, but for the idea sharing among attendees and networking that takes place.

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Classes also being offered at Corporate College East this Fall  
Call: 216-987-3075 to register. Credit Cards accepted.

Cost: \$55 per session (Enroll in all Five and get one Free: \$220)

Days: Saturdays

Time: 9 am – Noon

Place: Corporate College East - Free parking is available  
4400 Richmond Road, Warrensville Heights

Website: [www.corporatecollege.com](http://www.corporatecollege.com) then, go to interest area, Professional Development Institute, click on Nonprofit Management program curriculum.

#### How to Register:

To receive the AFP discounted rates above, please use the following special course numbers when registering for classes at Corporate College.

Call: 216-987-3075 Credit Cards accepted.

#### Development 101 and Special Events / September 8, 2007

For single class: \$55 For all five, get one free price

Course #88051 Course #88137

This course focuses on the information and skills needed to establish an integrated fundraising program. During this session, participants learn how to identify potential funding sources and how different types of fundraising fit into the bigger picture. This course provides 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. This course addresses the importance of special events and how they can be used as an effective entry point for donors into an organization.

#### Annual Giving / September 15, 2007

For single class: \$55 For all five, get one free price

Course #88053 Course #88138

Discover core constituencies and turn them into continuous annual donors. Understand the range of techniques available to design a plan and develop strategies to move donors along the path of lifetime commitment to your organization.

#### Individual Major Gift Fundraising / September 29, 2007

For single class: \$55 For all five, get one free price

Course #88057 Course #88139

Engage donors at a deeper level so that their annual giving reaches maximum financial capacity. Create a framework for development officers, staff and board members to institute an individual major gifts program. Understand the how-to's of laying the foundation of necessary attitudes, skills, insight and knowledge

#### Corporate & Foundation Grantseeking / October 6, 2007

For single class: \$55 For all five, get one free price

Course #88055 Course #88136

Although 85 percent of U.S. contributions to nonprofit organizations come 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 impact effective grant writing and reporting skills. You will also learn how to identify foundations willing to fund your organization's activities.

#### Board and Volunteer Development / October 13, 2007

For single class: \$55 For all five, get one free price

Course #88059 Course #88140

Energize volunteers to help your organization raise money. Discover the how-to's of working with board members efficiently and effectively as part of your fundraising efforts. Evaluate your current team and learn how to recruit the best board and volunteer fundraisers.

# 24<sup>th</sup> Annual National Philanthropy<sup>®</sup> Day

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opportunity to recognize a key volunteer in our "honor roll" section of Northern Ohio Live's National Philanthropy Day<sup>®</sup> feature published in November as well as the



Change the world with a giving heart.

full-page *Plain Dealer* advertisement promoting the event. Luncheon tables do not include the cost of workshop attendance.

## National Philanthropy Day<sup>®</sup> Workshops

### Annual Giving as the Foundation of Your Development Program

- August Napoli, Jr., President/COO, Summa Hospitals Foundation

### Voices of Experience

- Beth Brown, Senior Development Officer, The Holden Aboretum
- Daniel Ducoff, Consultant, Campbell and Company
- Tara Turner, Director of External Relations, Cleveland Zoological Society (On-line Giving)

### Soliciting Major Gifts

- Doug Allinger, President, Allinger & Company Inc – Fundraising and Search Consultants
- Lynne Feighan, Director of Institutional Advancement, Cleveland Botanical Garden
- Richard Fletcher, Senior Vice President, Baldwin-Wallace College
- Alex Petrus, Vice President for Advancement, Berea Children's Home & Family Services

### Soliciting Major Gifts – An Interactive Session

- Doug Allinger, President, Allinger & Company Inc – Fundraising and Search Consultants

### Career Advancement through Nonprofit Education

- Jennifer Alexander, Ph.D.
- Associate Professor & Co-Director, Cleveland State University, Center for Non-Profit Policy and Practice
- Duane Dukes, Ph.D., Professor of Sociology & Director, John Carroll University's Nonprofit Program
- Susan Lajoie Eagan, Ph. D., Professor & Executive Director, Case Western Reserve University, Mandel Center for Nonprofit Organizations

### Can Your Development Director Be Your Next Executive Director?

- Brian Broadbent, President and Chief Executive Officer, Business Volunteers Unlimited
- Lucinda Einhouse, President and CEO, The Beck Center for the Arts
- Susan Freimark, Program Manager, Center for Nonprofit Policy and Practice, Maxine Goodman Levin College of Urban Affairs at Cleveland State University
- John F. Lewis, Senior Counsel, Squire, Sanders and Dempsey, L.L.P

### Signature Sponsors



### Presenting Media Sponsor

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## AFP Fundraising Professional of the Year

The Association of Fundraising Professionals Cleveland Chapter is pleased to announce the recipient of the 2007 Fundraising Executive of the Year Award - Sherri L. Bishop, Esq.

Ms. Bishop currently serves as the Senior Vice President for Institutional Relations and Development at University Hospitals in Cleveland. In that role, she has distinguished herself for her ability to assemble and motivate a high-performance fundraising team of over 50 individuals. Under Ms. Bishop's leadership, University Hospitals raised a record \$100 million this past year (a 180% increase over the previous year), including the organization's single largest gift of \$30 million from the Ahuja family. As a member of University Hospitals' Senior Leadership Council, Ms. Bishop is playing a key role in driving the organization's strategic plan that calls for investments of \$1.2 billion

for improvements in patient care, technology, recruitment, and other initiatives.

Prior to coming to University Hospitals in October 2006, Ms. Bishop served as the Vice Chairman for Institutional Advancement at the Cleveland Clinic. She distinguished herself as a top fundraiser - establishing the Pyramid Legacy Society, which raised several hundred million dollars in gifts and commitments.

Over her sixteen-year fundraising career, Ms. Bishop has established a reputation as a passionate professional with an unwavering commitment to excellence. She currently resides in Lakewood with her husband and three children.



## Professional Development Opportunities

# Batteries On The Shelf

AFP member benefits are much like batteries on the shelf: not much good unless they're put into use. This places the responsibility on *you*, the member, to make sure you're taking full advantage of your AFP membership. Yes, it takes time and planning, but the inevitable rewards that come from active involvement in Chapter activities are well worth the effort.

There are, of course, those ongoing benefits you can use virtually any time:

**AFP Newsletter** - Current topics in fundraising, chapter news and more. Available in print or online at [www.afpcleveland.org](http://www.afpcleveland.org).

**Professional Development** - Member discounts for ongoing professional development.

**Scholarships** - Available for AFP membership, conferences and professional development. Visit the website for full details and deadlines.

**Breakfast Roundtables, Luncheons and Audioconferences** - Continuous programming that runs September through June on a wide variety of topics related to fundraising and nonprofit management.

**Mentoring Program** - Opportunities to gain professional insight from senior AFP members, through mentoring relationships.

**Job Placement and Career Development** - Structured networking opportunities to help members locate new positions in the field.

**Portability** - Being an individual membership, it goes with you if you change jobs/organizations.

And then there are those special opportunities to network and socialize with current and prospective members:

**Thursday, October 25, After Work Mixer** - Location TBA, but with AFP member Lyman Millard (Citizen's Academy) in charge of planning, it promises to be lively!

**Friday, November 9, Volunteer Gratitude Night** - For all those who supported AFP with their volunteer service during 2007.

Please add these dates to your calendar, and keep using your AFP member benefits. They won't help you if they're "sitting on the shelf".

*Michael Parry, CFRE, Vice President - Membership  
Senior Manager, Corporate and Foundation Support  
American Red Cross, Greater Cleveland Chapter*

## AFPGC Chapter Service Director Contact Information

AFP's chapter services directors reach out to members through chapters to ensure that members are realizing and utilizing all the benefits of membership. Please don't hesitate to contact our Service Director Val Lay for assistance.

Val Lay, CFRE

Director, Chapter Services-Central U.S.  
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## Welcome New Members

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*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 Stages at The Play House Club, 8501 Carnegie Avenue. Registration begins at 11:30 am, presentations are from 12-1:30 pm.

## Welcome New Members

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**Dianne M. Dillon**  
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**William J. Mountcastle**  
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**Deborah S. Miller, CFRE**  
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## Directors

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**2006  
Ten Star AFP Chapter**

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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](http://www.afpcleveland.org). Job listings will be posted on the web only.

REGISTRATION FORM

**National Philanthropy Day®**

November 2, 2007

Signature at LaCentre

25777 Detroit Road, Westlake, Ohio 44145

Workshops: 8:30 am – 11:30 am / Award Luncheon: 11:45 am – 1:30 pm

\_\_\_ **Table Sponsor:** Please reserve \_\_\_ table(s) for eight at a cost of \$600 per table.  
*By sponsoring a table, we wish to honor the following individual in the 2007 Honor Roll of Philanthropy.*

Name of honoree as it should appear:  
\_\_\_\_\_

Name of sponsoring organization as it should appear:  
\_\_\_\_\_

*Deadline to be recognized in **The Plain Dealer** and at the luncheon is October 1st.*

\_\_\_ **Workshop & Luncheon:**  
Please reserve \_\_\_ Track 1 \_\_\_ Track 2 \_\_\_ Track 3 at \$90 per person for AFP members, \$125 for nonmembers.

\_\_\_ **Luncheon Only:**  
Please reserve \_\_\_ individual tickets at \$50 per person for AFP members, \$60 for nonmembers.  
*Deadline for individual ticket reservation is October 26th.*

\_\_\_ **Workshop Only:**  
Please reserve \_\_\_ Track 1 \_\_\_ Track 2 \_\_\_ Track 3 at \$40 per person for AFP members, \$65 for nonmembers. *This option available for guests at sponsored tables.*

**Total Enclosed \$** \_\_\_\_\_  
\_\_\_ check enclosed made payable to Association of Fundraising Professionals  
\_\_\_ charge to my credit card: \_\_\_ Visa \_\_\_ MC \_\_\_ Amex

Card # \_\_\_\_\_  
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I prefer \_\_\_\_\_ vegetarian option(s) with this reservation.

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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. Make checks payable to Association of Fundraising Professionals.

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