



2007  
Ten Star AFP Chapter

March 2008 - SPECIAL ANNUAL REPORT ISSUE

## Greater Cleveland Chapter News

### The Essentials of Fundraising Series

The Association of Fundraising Professionals (AFP) Greater Cleveland Chapter is again offering its popular education series designed to help cover the basics of fundraising for development professionals. The Essentials of Fundraising Series includes modules addressing five essential elements of fund development:

1. **Corporate and Foundation Grantseeking / April 11th**
2. **Development 101 and Special Events / April 18th**
3. **Annual Giving / April 25th**
4. **Board and Volunteer Development / May 2nd**
5. **Individual Major Gift Fundraising / May 9th**

Basic fundraising skills are the foundation of any successful organization. Many organizations have limited human and financial resources and are challenged to develop critical and effective fundraising skills and strategies. Development professionals are asked to manage more than their fundraising functions and have little time to evaluate their systems and fundraising fitness.

The Association of Fundraising Professionals (AFP) Greater Cleveland Chapter is again presenting its popular education program that offers your organization, its staff and volunteers the essential tactics of fundraising theory and practice. This valuable program will put your organization on the fast track to successful fundraising.

The Essentials of Fundraising Series is composed of five modules that have been designed by experienced fundraising professionals to meet the real world needs and challenges nonprofit organizations face every day. The benefits of participating can energize your current fundraising plan and transform a struggling development effort. The Essentials of Fundraising Series provides best practices that will make your future fundraising efforts clearer and more effective.

#### What are the Essentials?

This series is divided into five interactive workshops. These workshops will help you develop skills that can be tailored to your organization. Additionally, you will have the opportunity to network and develop relationships with some of the finest and most successful fundraisers in the area. You will receive useful tools and materials, including sample fundraising plans, solicitation letters, policies and guidelines and other relevant fundraising resources

Cost: \$75 per session for Nonmembers; \$55 per session for AFP Members  
Enroll in all five moduls and get one free!  
Five sessions: Member: \$220 / Non-member: \$300

Days: Fridays

Time: 9 a.m. - noon

Place: Cleveland Foundation

1422 Euclid Ave, Suite 1300, Cleveland, Ohio

#### Upcoming Events

Wednesday, April 2, 2008

**Breakfast Roundtable**

*"Faith and Philanthropy"*

Nancy Fogal Ackley, Capital Campaign  
Consultant

Thursday, April 10, 2008

**Audioconference**

*"Demystifying Online Marketing  
for Nonprofits"*

Todd Baker

Thursday, April 17, 2008

**Luncheon**

*"Building an Effective Board"*

Elizabeth Voudouris,  
Business Volunteers Unlimited

Thursday, May 15, 2008

**Luncheon**

*"The Ten Commandments of Direct Mail"*

Barry Leaventon, Precision Printing

Tuesday, May 20, 2008

**Audioconference**

*"Advanced Annual Giving Techniques:  
Taking Your Program to the Next Level"*

Kathleen E. Pavelka, CFRE

Tuesday, June 3, 2008

**Audioconference**

*"How to Create Benchmarks for  
Naming Opportunities?"*

Terry Burton

Wednesday, June 4, 2008

**Breakfast Roundtable**

*"On-Line Giving"*

Claudia Timmerman

Thursday, June 19, 2008

NOTE: Date may change!

**Luncheon**

*"First Look at Giving USA 2008 Findings  
and the Impact on Greater Cleveland  
Nonprofits"*

Campbell & Company

**For registration information visit [www.afpcleveland.org](http://www.afpcleveland.org)**

## LETTER FROM THE PRESIDENT



Dear Friends,

As with any professional association, its strength is in its membership and the same holds true for the Association of Fundraising Professionals - Greater Cleveland Chapter. I hope as you take to time to read all of our accomplishment during the past year in this 2007 Annual Report to Members, that you see how AFP is making an impact with fundraising professionals throughout the Greater Cleveland community.

This past year, we saw record number of attendees at our educational offerings; our breakfast roundtables, our audio conferences, our monthly luncheons and of course, at our National Philanthropy Day® celebration. In addition, we had over 20 members participate in the International Conference on Fundraising in Dallas last March, the largest gathering of professional fundraisers and development professionals in the world.

We were thrilled to be awarded the Able Hanson Award from the International Office of AFP. This award is given to Chapters who do an exceptional job of maintaining communications with its members including means such as newsletters, our website and other written communications. Thanks to all involved for helping us achieve this prestigious award, given to only 4 chapters throughout the world.

We promise to work equally as hard this year to give you, our members, the best quality programs and opportunities needed to advance your careers and keep you abreast of the latest happenings in the philanthropic community.

Finally, I would like to welcome Carol L. Carbary, CFRE, the 2008 President Elect of the Chapter and the 2008 Chair of our 25th National Philanthropy Day® celebration. I look forward to working with Carol and all of you this year to make our Chapter maintain its status as one of the strongest in the country.

John F. Garofalo

### New Board Members

Congratulations and Welcome to our new AFP Greater Cleveland Board Members!

**Catherine W. Carter**  
**Laura J. Frye**  
**Susan L. Golden , PhD, CFRE**  
**Scott L. Hamilton**  
**Amy Restorick-Roberts , CFRE**  
**Julie A. Weagraff**

### Volunteer With AFP

Getting involved with an AFP committee, or working on an event like NPD® is a great way to support the Greater Cleveland Chapter, network with colleagues and earn those critical CFRE service credits!

Opportunities abound on AFP committees such as Membership, Professional Development, Communications and the many committees devoted to National Philanthropy Day®. For more information on how volunteering can benefit you contact one of the committee chairs, or a board member.

### 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

**Danelle Baker-Miller**  
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dmiller@cspohio.org

**Sally L. Bell**  
*Geaga County Dept on Aging*  
(440) 285-2222 x2132  
agingsally@windstream.net

**Robin Blass**  
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robin.blass@case.edu

**Michele Bourrie-Schafer**  
*Cleveland Clinic*  
(216) 445-0024  
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**Lisa Marie Brown**  
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**Marcia L. Ferguson**  
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**Erin Hall**  
*Consultant*  
(330) 571-3009  
ehall114@verizon.net

**Scott Leland Hamilton**  
*Hanna Perkins Center for Child Development*  
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### Welcome New Members

**Tynnetta Harris-McCall**  
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**Joe Anthony Marino**  
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## 2008 National Philanthropy Day® Leadership Awards

### Call for Nominations

National Philanthropy Day® provides us with the opportunity to reflect on the meaning of giving and all that it has made possible by celebrating the endless contributions of individuals and organizations throughout Northeast Ohio. AFP's Greater Cleveland chapter is proud of the tradition we have established to honor those who give so much of themselves to improve the quality of life in our community. We hope that you will join us on Friday, November 7, 2008 at Signature of LaCetnre in Westlake.

As a member of our chapter, your input is vital in identifying the potential recipients of the leadership awards we bestow annually:

- **Leadership Award – Corporate**
- **Leadership Award – Foundation**
- **Leadership Award – Philanthropist**
- **Outstanding Fund Raising Volunteer Award**
- **Youth in Philanthropy Award**

For more information and forms (link to NPD page, then repeat entire document, with attachments, on NPD page without this link)

The selection criteria for each award are included on the nomination forms you can download below. Please accompany any nomination with a one or two page description of the qualities, achievements or milestones that make this candidate deserving of selection. A comprehensive list of past award winners can be found on the NPD page.

**You may nominate candidates in more than one category**

**Anyone submitting nominations must be a member of AFP**

**Submit nominations no later than April 28, 2008**

**by mail, fax or email to:**

National Philanthropy Day Awards Committee

Association of Fundraising Professionals

1120 Chester Ave, Suite 470

Cleveland, OH 44114

Fax: 216-696-2582

Email: admin@afpcleveland.org

Your participation in this process is greatly appreciated.

**Membership Committee**

*Prepared by Michael J. Parry, CFRE*

Membership of AFP Greater Cleveland grew from 327 on January 1, 2007 to 359 on December 31, 2007, a 10% annual growth rate. I believe that solid leadership by Chapter President John Garofalo, reaching out to new members and soon-to-lapse members with phone calls, and member discounts on workshops and training sessions all contributed to our Chapter's growth in 2007. We are working hard to keep the trend going in 2008.

AFP Board Members Nancy Ackley, Mitch Wasserman and Michael Parry gave a panel presentation on careers in nonprofit fundraising at the Levin College of Urban Affairs at Cleveland State University on Monday, October 29, 2007. Students were eager to learn more about the topic, and one of the students who attended the workshop joined AFP. Another presentation is scheduled at Baldwin-Wallace College in Berea on Thursday, April 3, 2008.

Ron Vojacek (Hospice of The Cleveland Clinic) continues to lead mentoring efforts and regularly meets with individuals who are in career transition and seek employment in the nonprofit sector.

Beth Brown of Holden Arboretum graciously hosted a Summer Member Mixer on August 15 and thirty-five attendees were treated to fabulous food, beverages, an intimate view of the fantastic Garden Trains display and a complimentary family day pass. It was a delightful evening and great reminder of a tremendous Northeast Ohio resource.

Stacy Caddey continued to manage the Scholarship Program, and conference scholarship were awarded to Karen Kannenberg, Lisa Paul Sierk (the Chamberlain Scholarship), Mike Kenney and Jerry Mizer.

Anyone with an interest in serving on the Membership Committee should contact me directly, I would happy to speak with them.

**Professional Development**

*Submitted by Lauren Steiner*

The Professional Development subcommittees coordinated programming opportunities to enhance our members' fundraising interests and experience.

This year we made a concerted effort to coordinate between all of the avenues through which our chapter offers professional development opportunities: from breakfast roundtables, luncheons and audio conferences, to the recently added Senior Leadership Forum, the Essentials of Fundraising series, and workshops during National Philanthropy Day. This year we forged a unique partnership with Tri-C's Corporate College, to present a second set of the Essentials series. With a truly coordinated effort, we can continue to meet the professional development needs of our members and the fundraising community.

**Resource Development**

Resource Development efforts in 2007 focused on AFPGC's annual National Philanthropy Day® and the AFP Foundation for Philanthropy Every Member Campaign.

Constance Sipple led a team of 39 AFP members to create our chapter's most successful National Philanthropy Day® (NPD) celebration in November. Over 680 guests participated in an inspirational and educational day designed to celebrate the professional practice of philanthropy and recognize our award winners. The event strengthened our chapter's community relations activities with Northern Ohio Live's extensive promotion of NPD and the production and distribution of their National Philanthropy Day® feature. In addition, NPD raised over \$48,000 that will be used to support our chapter's program and scholarship activities.

The 2007 Every Member Campaign, chaired by Deborah Miller, surpassed its goal by raising \$4,600 from 67 members of our chapter. In addition to supporting training and research at the international level, our chapter will receive a grant of approximately \$1,100 for local scholarship support because it exceeded its campaign goal. Please see page 5 for a list of all 2007 donors.

**Treasurer's Report**

*Submitted by Bill Mountcastle*

2007 was a good year financially for your local chapter of the Association of Fundraising Professionals. As your elected board, we take very seriously the role of utilizing the funds raised by our membership, via National Philanthropy Day®, workshops, breakfast roundtables, and audio conferences as well as a portion of the dues you pay as members that come directly back to our Chapter, as efficiently and effectively as possible. I would like to take this opportunity to thank all of you who attended our events, renewed your membership or joined AFP for the first time in 2007. You all have a direct impact on the financial stability of our organization and we appreciate your continued support as we move into a new year of programs and services.

As your Treasurer for 2007, I am pleased to present you with our financial information as of December 31, 2008:

**Income:**

Every Member Campaign .....	\$1,166
List Sales .....	\$240
Membership Dues .....	\$14,400
Program Fees .....	\$30,167
National Philanthropy Day® .....	\$107,800
Website Advertising .....	\$15,675
<b>Total Income .....</b>	<b>\$169,448</b>

**Expenses:**

Administrative Expenses .....	\$30,144
Board Operations .....	\$5,747
Communications .....	\$6,454
Membership/Marketing .....	\$1,347
Program Expenses .....	\$21,446
National Philanthropy Day® .....	\$56,378
Scholarships .....	\$4,259
<b>Total Expenses .....</b>	<b>\$129,950</b>

**AFP Foundation for Philanthropy**

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

The 2007 Every Member Campaign was a huge success. Special thanks to all members who contributed and helped our chapter obtain our \$4,325 goal! As of January 30, 2008, our chapter raised \$4,600 with 21.6% of our membership making gifts (64 members). Our chapter will be eligible for a grant of 25% of the final amount raised, or approximately \$1100. This money will be used for scholarships for our members.

AFP Greater Cleveland Chapter wishes to acknowledge the following donors to the Every Member Campaign. Those marked with an asterisk donated \$100 or more! THANK YOU!

- Joan M. Ackerman
- Nancy Fogal Ackley, CFRE\*
- Joan H. Ainsworth, CFRE\*
- Clara A. Amster, CFRE
- Jay T. Ansberry, III
- Renee Aten, CFRE\*
- Cynthia Glunt Bailie
- Leslie Bednar
- Heather A. Beebe Stevens
- Arlene Bourisseau\*
- Barbara Boyce, CFRE
- Beth Brown\*
- Stacy A. Caddey, CFRE
- Andre Calabretta
- Mary Ann Campbell
- Carol L. Carbary, CFRE\*
- Mary Cosgrove
- Anne Marie Cronin\*
- Nancy Davis
- Anne B. DesRosiers, CFRE
- Amanda Joy DeWees
- Dianne Dillon
- Susan L. Ertle
- Laura J. Frye
- John F. Garofalo, CFRE\*
- Susan L. Golden, Ph.D., CFRE\*
- JoAnne T. Grundke
- Michael P. Grzesiak\*
- Bridget Hawes
- James R. Hickey, CAP, CFRE\*
- James P. Howard, CFRE
- Gerald R. Jindra\*

- Karen J. Kannenberg, CFRE\*
- Rick A. Kemm, MNO\*
- William J. Kimball, CFRE\*
- Douglas Knoop\*
- Mary Margaret Lashutka
- Deborah S. Miller, CFRE\*
- Nicole C. Mohar
- William J. Mountcastle\*
- Annmarie Latiak Nocella, CFRE
- Timothy O'Callahan
- Laura Orazi
- Michael J. Parry\*
- Paul Pawlaczyk
- Alex S. Petrus, CFRE\*
- Mary Rainsberger, CFRE
- Amy Restorick-Roberts, CFRE
- Kevin E. Riordan, CFRE\*
- Susan Marie Sanders\*
- Constance Sipple, CFRE\*
- Jerold R. Smith\*
- Rebecca Ruben Smith
- Alicia Soss
- Sue Starrett
- Lauren P. Steiner, JD
- Vicki Stouffer, CFRE\*
- Diane Strachan, CFRE
- Elizabeth C. Vernick, CFRE
- Ronald C. Vojacek\*
- Mitchell Wasserman\*
- Julie A. Weagraff\*
- Kerri Whitehouse
- Marilyn F. Wright, CFRE

## Professional Development Opportunities

### Breakfast Roundtables

Wednesday, April 2, 2008

Topic: "Faith and Philanthropy"  
Presented by: Nancy Fogal Ackley,  
Capital Campaign Consultant

Wednesday, June 4, 2008

Topic: "On-Line Giving"  
Presented by: Claudia Timmerman

Wednesday, September 3, 2008

Topic and presenter to be announced.

Wednesday, October 1, 2008

Topic and presenter to be announced.

*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

Thursday, April 10, 2008

Topic: "Demystifying Online Marketing for Nonprofits"  
Presented by: Todd Baker

Tuesday, May 20, 2008

Topic: "Advanced Annual Giving Techniques: Taking Your Program to the Next Level"

Presented by: Kathleen E. Pavelka,  
CFRE

Tuesday, June 3, 2008

Topic: "How to Create Benchmarks for Naming Opportunities?"  
Presented by: Terry Burton

Thursday, September 4, 2008

Topic: "Redefining Fundraising Success Through Analytics"  
Presented by: Josh Birkholz

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

### Luncheons

Thursday, April 17, 2008

Topic: "Building an Effective Board"  
Presented by: Elizabeth Voudouris,  
Business Volunteers Unlimited

Thursday, May 15, 2008

Topic: "The Ten Commandments of Direct Mail"  
Presented by: Barry Leaventon,  
Precision Printing

Thursday, June 19, 2008

NOTE: Date may change!  
Topic: "First Look at Giving USA 2008 Findings and the Impact on Greater Cleveland Nonprofits!"  
Presented by: Campbell & Company

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

## CFRE, Me?

Yes, you! The Certified Fundraising Professional designation is a great way to let people know you're a serious, dedicated, professional fundraiser. CFRE certification serves as an impartial, third-party endorsement of your knowledge and experience against international standards in philanthropy. It adds to your credibility as a fundraiser and sets you apart from other professionals.

The application for CFRE has requirements for continuing education, professional practice, performance, and a significant amount of community service. The details of these requirements can be found at [www.cfre.org](http://www.cfre.org). Much of the professional practice and performance

requirements will be fulfilled easily through your job. The ongoing education hours can be compiled through the many AFP Greater Cleveland roundtables, luncheons, seminars and the excellent Essentials of Fundraising series. CFRE education credits are currently a self-monitoring system, but this is changing in 2009 and all CFRE credits must then be from approved education sessions. We will keep you abreast of these changes and are already insuring that AFPGC education sessions meet this new standard. Finally, the requirement for service credit must be met through your involvement and activities in the community. Nearly any kind of volunteer service can count and one of the best

ways to accomplish this is through volunteering with your AFP chapter. Serving on a committee, volunteering for NPD or other events, and sitting on the AFP Board are great ways to achieve these service credits in addition to the benefits inherent in working with other AFP members.

As mentioned above information on the CFRE designation, how to apply and take the examination is all to be found on the [www.cfre.org](http://www.cfre.org) website. CFRE is not affiliated with AFP Greater Cleveland, AFP International or any other subsidiary organization. CFRE is a true third-party examination and certification provider.

## Welcome New Members

**Casey Matuszewski**  
CASE Alumni Association  
(216) 231-4567  
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**Sarah McGreer Hoyt**

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## 2008 Greater Cleveland Chapter Officers

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Secretary  
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**William J. Mountcastle**

Treasurer  
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**Carol L. Carbery, CFRE**

President Elect  
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## Directors

**Joan M. Ackerman**

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**Nancy J. Ackley, CFRE**

Capital Campaign Consultant  
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**Beth Brown**

The Holden Arboretum  
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**Susan L. Ertle**

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

Association of Fundraising Professionals Greater Cleveland Chapter  
25th Annual

## NATIONAL PHILANTHROPY DAY® Change Northeast Ohio with a Giving Heart

**SAVE THE DATE**  
Friday, November 7, 2008

Signature at LaCentre • 25777 Detroit Road • Westlake, Ohio

*Event festivities will include morning professional development for fundraising professionals that will include nationally recognized speaker, David R. Dantop beginning at 9:00 a.m. and the awards luncheon from 11:45 a.m.-1:30 p.m.*

### Award Nominations

Consider recognizing a donor who has significantly impacted your organization, a special volunteer with remarkable fundraising skills or an inspiring student by submitting a nomination for the 25th Annual National Philanthropy Day® awards. The AFP Greater Cleveland Chapter's annual awards offer a unique way for your organization to honor those who are the most deserving in Northeast Ohio!

Nominations will be accepted through April 28, 2008 for the following awards to be presented at our National Philanthropy Day® Silver Anniversary event in November\*:

Leadership Award – Corporate  
Leadership Award – Foundation  
Leadership Award – Philanthropist  
Outstanding Fundraising Volunteer Award  
Youth in Philanthropy Award

*\*Nominations may only be submitted by AFP members.*

### Sponsorship Opportunities

National Philanthropy Day® provides an ideal way to recognize charitable giving in Northeast Ohio and those who are active in the philanthropic community. To discuss event sponsorship and vendor exhibition please contact Amy Restorick-Roberts, CFRE at 216.581.2902 ext. 2327.



Please call Carol Carbery,  
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visit [www.afpcleveland.org](http://www.afpcleveland.org)  
for more information.