AFP Foundation for Philanthropy's new Strategic Initiatives major-gifts program is making important strides in its first full year. Already in 2006, the foundation has secured major funding for such initiatives as youth in philanthropy, diversity and professional development.

“We launched our Strategic Initiatives program in mid-2005,” said Don W. Taylor, CFRE, vice president and chief development officer for Courage Center in Golden Valley, Minn., and chair of the foundation’s board of directors. “Now in 2006 we are really starting to build momentum towards the full major-gifts program we envision for the foundation.”

One example of the foundation’s success is the Youth in Philanthropy Summit to be held Nov. 12–14, 2006. AFP will assemble the leaders of dozens of national youth-serving organizations at Rollins College in Winter Park, Fla., to examine how the full gamut of their philanthropy and volunteerism programs can be mutually reinforcing and thus more productive and effective.

A major grant by the Edyth Bush Charitable Foundation funded the Youth in Philanthropy Summit. Additional support came from 4-H and the Philanthropy and Nonprofit Leadership Center at Rollins College, and the foundation is still receiving contributions from individual donors. Insufficient funding earlier in the year caused the summit’s delay. Full funding of the summit will total more than $40,000, which the foundation has very nearly secured. “The funding secured for the YIP Summit confirms the model we developed for the Strategic Initiatives program,” said Linda Lysakowski, ACFRE, vice president of development and chief development officer for the National Academy of Public Service (CCS), the inaugural issue of Kaleidoscope. “Our major-gifts donor base consists of individuals, foundations and corporations. Diversification is our key concept.”

In AFP’s efforts to continually improve the quality of professional development courses available to fundraisers, the AFP Faculty Training Academy (FTA) is a strategic component. The academy is a three-day intensive course of study and training in teaching adult learners. Individual fundraisers voluntarily take the course, at their own expense of time and travel costs, and upon graduation agree to teach at least three fundraising courses during the next two years. Many of the best instructors of AFP chapter educational sessions are FTA graduates.

The foundation conducted a fundraising campaign to support this year’s Faculty Training Academy, which was held June 13–15 in Miami. Nearly $7,500 was raised from individual donors, including lead gifts from Robert J. Crandall, CFRE, consultant, Robert J. Crandall & Associates, Woburn, Ind.; Gail L. Freeman, president, Freeman Philanthropic Services LLC, New York; Roberta A. Healey, MBA, ACFRE, principal, Farr Healey Consulting LLC, West Chester, Pa.; and Susan B. Ulin, president, Susan Ulin Associates Ltd., New York. “The FTA was a tremendous learning experience. It taught me how to be a much better teacher of fundraising courses and workshops, which will help my colleagues be better fundraisers,” said Susan Earl Hosbach, CFRE, director of development and marketing for Cheekwood Botanical Garden & Museum of Art in Nashville, Tenn. “The foundation’s support helps keep the FTA tuition-free, thereby allowing everyone an equal opportunity to learn and grow.”

Promoting greater diversity in the fundraising profession is another important strategic goal of AFP. This autumn, AFP’s diversity efforts will become much more visible with the launch of the newsletter Kaleidoscope. This quarterly publication will help AFP link communities around the world by promoting cultural diversity to donors, boards and fundraisers. It will be distributed to the more than 27,000 members of AFP; its content will span the most basic information to the most thought-provoking vantage points.

Through a major gift of more than $12,000 secured by the foundation from New York-based Community Counselling Service (CCS), the inaugural issue of Kaleidoscope and the eight subsequent regular issues will enjoy sound financial footing. “We are immensely grateful to CCS for its strong support of Kaleidoscope and AFP’s ongoing efforts to promote diversity within the fundraising community,” said Alphonse J. Brown Jr., ACFRE, vice president of development for the National Academy of Public Administration in Washington, D.C., and chair of AFP’s board of directors.

“Funding the Youth in Philanthropy Summit, the Faculty Training Academy and Kaleidoscope will be examples of how the foundation is fulfilling its mission of promoting ethical and effective fundraising,” said Curtis C. Deane, CFRE, CAE, president of AFP Foundation for Philanthropy. “Through our Strategic Initiatives major-gifts program, we will be able to expand and strengthen the effectiveness of the foundation’s efforts in funding programs important to our donors and fundraisers everywhere.”

2006 STRATEGIC INITIATIVES

• Major program to encourage youth involvement in philanthropy and volunteer work
• Multi-year and comprehensive program to diversify the fundraising profession
• AFP Faculty Training Academy strengthening the skills of volunteer instructors
• Dramatic expansion in the dissemination of the Essentials of Fundraising educational program
• Book on the cost of fundraising and administration
• Initiatives designed to provide fundraising educational programming outside North America as well as to promote a Universal Code of Ethics...
The purpose of the Foundation is to provide millennium advantage and support nonprofit institutions. The Foundation strives to enhance philanthropy and serves as a resource to program them through professional training, education and support. The purpose of the Foundation is to support the development of new AFPs, chapters and to assist fundraisers register for professional development activities, such as the annual AFP International Conference on Fundraising.

At the 43rd AFP International Conference on Fundraising in Atlanta in April this year, 112 Chamberlain Scholars were able to attend thanks to their registration fees being paid in part by the Ralph E. Chamberlain Sr. Endowment Fund. Additionally, three attendees received funding from the Charles L. Lawson Endowment Fund, which provides scholarships to fundraisers from outside the United States, with an emphasis on those from developing countries. Those conference attendees were Rad Al Hadid of Amman, Jordan; Sheila Mermelstein of Sao Paulo, Brazil; and Jesus Acosta of Monterrey, Mexico. To prepare faculty for the annual conference, the Mary Jean Gillman-Gilbert Endowment Fund made its first grant this year to support the AFP Faculty Training Academy held in Miami in June. Nearly 30 senior fundraising professionals participated to learn how to effectively teach adult learners.

In support of ethics programming, the Patricia F. Lewis Ethics Endowment Fund has supported two important recent activities. The fund supported the AFP Ethics Think Tank in Washington, D.C., in September 2005, where participants discussed how to promote ethics as a guiding principle in professional fundraising. Also, a grant from the fund helped to support the AFP Ethics Workshop in San Francisco in March 2006. The workshop provided an examination of AFPs' ethical code and practical application.

The Barbara H. Mulville Endowment Fund made its first-ever grant in 2006, having achieved its $50,000 funding level in 2005. The fund supports strategic planning activities, in recognition of the significant strategic planning undertaken by AFP when Mulville was chair of AFP's board of directors. The fund's first grant went to AFP to support strategic planning for the association's 50th anniversary, which will occur in 2010.

One of the Foundation's oldest endowments is the BB&T Ex Officio Scholarship program with the chapter, which is now in place. The chapter will award scholarships this fall to four recipients to attend the 44th International Conference on Fundraising in Dallas, March 25-28, 2007.

The foundation's newest endowment is the Ron and Pam Carroll Endowment for International Development of AFP Chapters. Created in 2005 to support the development of new AFP chapters outside the United States, the fund has raised nearly $18,000 toward its fundraising goal of $25,000. Once the fund reaches its mark, the foundation will make grants. While most of the endowments have reached their minimum funding goals and grants are being made, the foundation welcomes contributions to any of its endowments. This year more than $8,000 in new contributions has been received. For information on making a contribution or regarding any particular endowment, contact Curtis C. Deane, CFRE, CEA, president of AFP Foundation for Philanthropy, at 800-666-3863 or afpnet.org/afp_foundation_for_philanthropy.

The 43rd AFP International Conference on Fundraising welcomed 112 Chamberlain Scholars among the thousands of attendees who flocked to Atlanta April 2-5, 2006. Made possible through a generous planned gift from Ralph E. Chamberlain, CFRE, and unrestricted support of the Every Member Campaign, the Chamberlain Scholars Program allows one first-time attendee from each chapter to attend AFP's annual conference. Scholars are able to build their fundraising “toolbox” by attending educational sessions and by exchanging ideas.
CORPORATE CAMPAIGN INITIATED

AFP Foundation for Philanthropy's Corporate Campaign is reinvigorated for 2006 and seeking support for the foundation's programs, according to freshman board member George C. Ruotolo Jr., CFRE. “Corporate members of our community support philanthropy through sponsorships and advertisements,” said Ruotolo, chairman and CEO of Ruotolo Associates, Inc., in Cresskill, N.J. “Now we challenge them to take another step and give to the foundation to support our educational, research and grant-making activities.”

Led by Ruotolo, the Corporate Campaign committee solicits companies for annual fund gifts to the foundation. With this new volunteer leadership energy in the Corporate Campaign, the foundation will renew and build relationships with the corporate community. The result will be a win-win situation for the foundation, which will gain support for its funding initiatives, and for corporations, who will receive greater visibility through recognition in foundation and AFP publications and at the International Conference on Fundraising.

“Ruotolo Associates is a long-standing supporter of the foundation’s Corporate Campaign,” says Curtis C. Deane, CFRE, CAE, president of AFP Foundation for Philanthropy. “George believes in the mission of the foundation and is a natural volunteer leader for this campaign.”

The Corporate Campaign is part of the foundation’s annual fund, which includes the Every Member, Chapter, Treasury, Board and Staff Campaigns. For more information on the 2006 Corporate Campaign, contact Deane at 800-666-3863 or deane@afpnet.org.

GIVING EASED WITH ALPHA SOCIETY

AFP Foundation for Philanthropy’s Alpha Society provides an easy, effortless method of making a gift. With more than 120 participants, this monthly, sustained giving program continues to grow.

When a donor joins the Alpha Society, he or she commits to a monthly amount transferred from a personal checking or savings account or credit-card account. This monthly gift continues until the donor wishes to make a change.

“When I heard about the Alpha Society and the ability to have funds electronically transferred, I said ‘yes’!” commented Susan K. Neistiel, CFRE, development director for Kutztown University Foundation in Kutztown, Pa., and a member of the newly formed AFP Pennsylvania Berks Regional Chapter.

“What a painless way to support the foundation and its mission.”

Using electronic funds transfer for gifts benefits both the donor and the foundation. The donor becomes a consistent giver, which is important in annual funds, and never has to ask, “Did I send my gift this year?” The foundation is able to keep administrative costs low, while at the same time preparing for the future with a consistent gift stream.

“That is why I chose [the Alpha Society]; support for the foundation and convenience,” said Richard A. Wilson, CFRE, director of development for the Southern Arizona AIDS Foundation in Tucson, and president of the AFP Southern Arizona Chapter. Lauren Geiger-Maye, who is an associate with Demont & Associates in Portland, Maine, a board member of the AFP Northern New England Chapter and an Alpha Society donor since 2003, echoed Wilson, adding, “My monthly donation is just a small token of appreciation for all I have gained through AFP and a way to help others who are entering the field of development.”

For more information on Alpha Society, contact Steven L. Mayo, manager of annual giving for AFP Foundation for Philanthropy at 800-666-3863 or smayo@afpnet.org.

FUNDRAISING LIBRARY GRANT TO BE AWARDED

The AFP Pierpont-Welde Affiliate Library Collection has been designed to allow AFP chapters to donate the collection to their local libraries or other sites where it will be available to the public. Consisting of 36 books on philanthropy and fundraising, the collection embodies the fundamental knowledge base of the fundraising profession.

Through its Pierpont-Welde Research Library Fund, AFP Foundation for Philanthropy is inviting AFP chapters to apply for a grant to assist in purchasing the collection, which has a sales price of $2,000. The foundation will award $500 to one chapter that agrees to purchase the collection and donate it to a library or other public resource site.

“This is the first time the foundation will be making a grant related to donating the Pierpont-Welde Affiliate Library Collection,” explained Curtis C. Deane, CFRE, CAE, president of AFP Foundation for Philanthropy. “If enough chapters apply, it is possible the foundation will elect to expand its grant program in this area.”

The collection honors long-time and current AFP member Robert Pierpont, CFRE; and his wife, Marion, and their parents Robert E. and Elise D. Pierpont and John C. and Florence B. Welde. The collection is currently housed in numerous public, university libraries and nonprofit resource centers throughout the United States and Canada.

The grant application deadline is Friday, Nov. 17, 2006. Interested chapters should contact Peg Bergeron, AFP’s director of chapter administration, at pegb@afpnet.org.
As of September, 106 AFP chapters have committed more than $85,000 to the 2006 Chapter Treasury Campaign, which directly supports the foundation’s work in education, research and scholarship.

"Lead by example" is the battle cry, and $85,000 to the 2006 Chapter Treasury Campaign, which directly supports scholarship, fundraising research, among other programs.

When chapters make a gift to the foundation, they inspire broader support from the membership. "People support organizations that their peers support," said Steven L. Mayo, the foundation’s annual giving manager. "When potential donors see those around them making gifts, they want to follow suit."

The foundation appreciates and acknowledges the support of AFP's 174 chapters and will recognize all 2006 donors in the annual report.

**2006 CHAPTER TREASURY CAMPAIGN DONORS AS OF SEPTEMBER 29, 2006**

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**CHAPTER BOARDS COMMIT TO EVERY MEMBER CAMPAIGN**

The induction of fifteen new members on October 27 highlighted a year of unprecedented growth for the Omega Circle — AFP Foundation for Philanthropy's planned-giving society.

"With the tremendous leadership of our planned-giving committee co-chairs, Stephen M. P. Croft, president of Levy Philanthropic Counsel LLC in Huntington, N.Y., and Mary Jean Gilbert, CFRE, fundraising consultant with Forster-Gilbert Associates in Buford, Ga., the Omega Circle has grown by more than 10 percent this year," said AFP Foundation for Philanthropy President Curtis C. Deane, CFRE, CAE. "In 2005, we only gained three commitments to the Omega Circle, compared to 15 already this year."

The Omega Circle now has 122 members. A dinner ceremony at La Cachette Restaurant in Los Angeles celebrated the induction, and the Omega Circle Class of 2006 also were recognized the next day at a reception for the attendees of the AFP Delegate Assembly in Los Angeles.

The Omega Circle honors and recognizes individuals who have made a planned gift of $5,000 or more to AFP Foundation for Philanthropy or AFP Foundation for Philanthropy – Canada.

"In 2005, we gained only three planned gifts of $5,000 or more to AFP Foundation for Philanthropy or AFP Foundation for Philanthropy – Canada."

"We are very excited about the strong growth of the Omega Circle this year," said Audrey P. Kintzi, ACFCRE, president of Levy Philanthropic Counsel LLC in Huntington, N.Y., and Mary Jean Gilbert, CFRE, fundraising consultant with Forster-Gilbert Associates in Buford, Ga., the Omega Circle has grown by more than 10 percent this year," said AFP Foundation for Philanthropy President Curtis C. Deane, CFRE, CAE. "In 2005, we only gained three commitments to the Omega Circle, compared to 15 already this year."

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"In 2005, we gained only three planned gifts of $5,000 or more to AFP Foundation for Philanthropy or AFP Foundation for Philanthropy – Canada."

**OMEGA CIRCLE CLASS OF 2006**

- Mark S. Abner, CFRE
- Curtis C. Deane, CFRE, CAE
- Jay Frey, CFRE
- Lori Guisard, CAE
- Audrey P. Kintzi, ACFCRE
- Shana Klein, MA
- Barbara Larson
- Andrea McManus, CFRE
- Terry M. Mercer, CFRE
- Roderick L. Reinhart, CFRE
- Martha H. Schumacher, CFRE
- Gary Schrenk, CFRE
- Krista Thompson, CFRE
- Andrew Watt
- Catheline Williams, Ph.D., CAE