



# The Steward

## Philanthropy and Fundraising: Noble Excellence

**To give away money is an easy matter, and in any man's power. But to decide to whom to give it, and how large and when, and for what purpose and how, is neither in every man's power nor an easy matter. Hence, it is that such excellence is rare, praiseworthy and noble.**

—Aristotle (384–322 BCE)

It is doubtful that charitable foundations existed in Aristotle's time, but clearly he understood the heart of such work. In 2012, foundations contributed \$45.74 billion, or 15 percent of total giving in the United States, compared with \$10.99 billion (inflation-adjusted dollars) in 1972, or 8 percent of total giving. Foundations play an increasingly important role, making a positive impact at the local, national and international levels.

Recently we had the privilege of talking with David A. Odahowski, president and CEO of the Edyth Bush Charitable Foundation in Winter Park, Fla., and Lisa Blackwelder, executive director of the Lawrence E. White Family Foundation in Orlando, Fla., and a newly elected member of the AFP board of directors. As representatives of the philanthropic community and the fundraising profession, they understand firsthand the changing needs of people and organizations. They experience the benefits accrued when philanthropists and fundraising

professionals work in partnership to build the capacity of philanthropy, making the world a better place.

Blackwelder sees the growing impact of philanthropy and the joy of giving on a very personal level. She places high value on personal involvement and engaging donors in causes and programs they choose to support. Blackwelder herself is also a burgeoning philanthropist.

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## Canadian Foundation Produces Two New Products

The AFP Foundation for Philanthropy–Canada is pleased to announce that two exciting products are now available for the fundraising profession.

### 1. *What Canadian Donors Want*

In conjunction with Ipsos Reid, the foundation completed a follow-up study on *What Canadian Donors Want*. Conducted in late 2013, the survey found that 86 percent of Canadians considered themselves knowledgeable about the causes they support, which is a nine-point jump from the 2011 survey. In addition, seven in 10 Canadians typically

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“Philanthropy is how everyday people can change the world,” she says. “I’m not a scientist, so I can’t find a cure for a disease. But through philanthropy, I can contribute to finding a cure.”

“Philanthropy also brings people together. I have been to Haiti twice, and each time it was an incredible experience to see the positive impact giving can have when people are genuinely unified in creating change. My nephews and niece helped pack four boxes with items to take to Haiti and also wrote notes. When I got back, they asked, ‘How are our friends in Haiti?’ They already know about giving out of the goodness of their hearts. But we have to continue to teach, opening the minds and the hearts of young people.”

Odahowski, and the Edyth Bush Charitable Foundation, have been longstanding supporters of the missions and strategic initiatives of AFP and the AFP Foundation. He sees a rapidly changing landscape in philanthropy, from endowed private foundations, corporate giving programs and community foundations to a diverse collective of hybrid organizations and enterprises. These are fueled by philanthropists who are not willing to wait 10 or 15 years to get something done. “They are engaged and actively raise money to make an impact immediately,” Odahowski says. “We are all part of the change.”

Part of that change, he points out, can be seen in Orlando, which has developed a worldwide brand through the philanthropic investments of wealthy and committed local citizens. Odahowski also sees more sports celebrities and sports teams involved in philanthropy today. “We have to engage new residents all the time,” he says. “To be successful in today’s philanthropic environment, you have to engage the entire community—not only established philanthropists but also those who are less well known. This is an important lesson for fundraisers: The face of philanthropy is changing.”

In fact, development officers who are AFP members and who have made fundraising their profession can interact with these successful, engaged philanthropists and bring forth best practices to these donors. “They are entrepreneurs who have achieved success by often taking the road less traveled,” Odahowski explains. “Entrepreneurs who have been so successful in their work know only one way—their way—of doing

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

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The **AFP Foundation for Philanthropy–Canada** works to ensure the advancement of philanthropy by supporting AFP’s mission and goals in Canada; to seek, receive and expend philanthropic funds on AFP’s behalf; and to engage in related activities required to fulfill the association’s purposes and mission.

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Lori Gusdorf, CAE, executive director

Cynthia Quigley, director, Canadian services

Jessica Kostuck, coordinator, Canadian services

## Philanthropy and Fundraising: Noble Excellence

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things. They are seldom familiar with the dynamics of philanthropy and the approaches to undertaking a philanthropic endeavor. Fundraising professionals can play a critical role as advisers and advocates for ethical and effective fundraising and building the public trust. It takes years to build a reputation, but only a moment to lose it.”

Blackwelder believes that the *AFP Code of Ethical Principles and Standards* is a critical factor in making fundraising a respected profession. “Fundraisers have to be good stewards,” she says, “and they must understand and represent the donor’s wishes.”

Both Blackwelder and Odahowski share a common belief that the best investment philanthropists and fundraising professionals can make is the development of future leaders who will guide philanthropy in the years ahead. “It’s our role and responsibility to teach the next generation of both fundraisers and philanthropists,” Blackwelder says.

This requires opportunities for professional education and career development, socialization and research to develop effective practices in fundraising and philanthropy, public education and mentoring. Years ago, when Blackwelder was a development director at the BETA Center, she learned that one of BETA’s strongest supporters was the Edyth Bush Charitable Foundation. She built a relationship with Odahowski that has continued to this day. Later, Blackwelder became a mentor herself when she recruited Christine Sanwald as an intern. “I wanted to mentor someone the way David had mentored me. It was a wonderful experience. I learned as much from her as she did from me. We became peers, since Christine was the president of the AFP Collegiate Chapter at the same time I was president of the local AFP chapter. We still keep in touch. I’m so proud of her and her career.”

Odahowski recalls that he was in his 20s when he became involved with the Minnesota Council on Foundations. “One day, I met a member of NSFRE, Bea Capriotti, who told me what it means when you deal with someone with a CFRE from NSFRE. That person is bound by a code of ethics, has studied to achieve that credential and is committed to the profession.”



David A. Odahowski



Lisa Blackwelder

Every day, Odahowski interacts with young people who are interested in improving the community and effecting social change. “They want to be successful—on their own terms—but they also want to do something significant,” he says. “Today with ‘mandatory volunteerism’ in schools, students serve and enhance their communities in many ways that provide rich learning experiences that cultivate a lifelong commitment to giving.”

Odahowski also encourages organizations such as AFP and the AFP Foundation for Philanthropy to extend themselves and their resources to these young people. However, don’t get in their way. “They will do things their way, and maybe succeed or fail. But offer the resources,” he says. “This has to be fueled by human and financial resources. Organizations should find ways for young people to sit on their boards and committees, and develop ways to pass knowledge on to the next generation through personal contacts and role modeling. Allow young people to experience the challenges and help to create the solutions. By offering registrations to their conferences and professional meetings and education programs, AFP and the AFP foundation may spark the interest of someone who may not have thought about fundraising.”

Even Blackwelder had never considered a career in fundraising or philanthropy. In fact, she wanted to work with her family in the fashion industry or become a school teacher. Volunteering changed all that. “I have four sisters, and we always spent a lot of time volunteering. As a kid, I didn’t realize that was a career option,” she recalls. “My first job was with the Chamber of Commerce, which opened my eyes to fundraising as a career. I moved on to the American Cancer Society, and then to BETA Center. I started working at the Lawrence E. White Family Foundation in 2013, and I’m the first person in this position. It is a perfect fit for me, yet more challenging than I ever could have imagined. I love what I do.”

The Edyth Bush Charitable Foundation is reaching out to AFP Collegiate Chapters in Florida, as well as the Young Nonprofit Professionals Network. “It’s the responsibility of the whole organization to bring in young people,” Odahowski says. “We understand that the best organizations are volunteer led and staff driven. We are advocates of early board service for members of the next generation. We need to be thinking about young people and diverse backgrounds to be a part of our organizations and building their capacity for the future.” ♦

## Four New Members Inducted Into the Omega Circle

The Omega Circle recognizes donors who have made a planned gift of \$5,000 or more to the AFP Foundation for Philanthropy or the AFP Foundation for Philanthropy–Canada. The two foundations honored four new Omega Circle members during the 2013 AFP Leadership Academy in Pittsburgh: Paul A. Dunne, CFRE; Janice Waud Loper, M.A., CFRE; Stephen E. Peeler; and Jeremy R. Wells, CFRE.

The Isabela on Grandview restaurant in Pittsburgh provided the backdrop as members of the 2013 Omega Circle class celebrated their commitments to supporting the profession and shared their stories about their motivation to join the Omega Circle.

Members of the class of 2013 bring the membership of the AFP foundations' Omega Circle from the United States and Canada to 226 dedicated members. In the words of Paul A. Dunne, CFRE, vice president for development at The Kempe Foundation for the Prevention and Treatment of Child Abuse and Neglect in Aurora, Colo., and a member of the Omega Circle Class of 2013, "When I changed my life direction and entered the nonprofit arena, one of the first—and best—decisions I made was to join AFP. The guidance

from the organization and its members has been instrumental for my growth as a fundraising professional. I am honored to be an Omega Circle donor, and hopefully I can continue the AFP legacy of educating others in the development field."

While the AFP foundations appreciate every gift from every donor, a planned gift is perhaps the most thoughtful gift. Making a planned gift is an intentional decision to create a lasting legacy that transcends our current perspective. It is a unique and truly personal investment in our future. In joining the Omega Circle, our professional colleagues confirm their enduring commitment to the highest principles and values in fundraising and philanthropy. A planned gift has enormous power. It has the power to energize, preserve, enhance and inspire. ♦



Pictured (from l to r) are Stephen E. Peeler, Jeremy R. Wells, CFRE, and Paul A. Dunne, CFRE. Janice Waud Loper, M.A., CFRE, was not in Pittsburgh.

## Canadian Foundation Produces Two New Products

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conduct research on a charity before they give, with 44 percent saying they proactively look up charities even before they are asked to give.

The survey produced six fact sheets, in both English and French, which are now available on the Canadian foundation page of the AFP website, [www.afpnet.org](http://www.afpnet.org).

- The Giving Decision
- Why Donors Give
- Attitudes Toward Charities and Nonprofit Organizations
- Administration and Operations
- Thanking Donors and Role of Fundraisers
- Learning About and Selecting a Charity

The research was generously funded by the AFP Foundation for Philanthropy–Canada through donations by Canadian AFP members to the Every Member Campaign, as well as support from donors Don Johnson and Michael Decter.

## 2. Public Awareness Tool Kit

The AFP Foundation for Philanthropy–Canada and the AFP Canadian Government Relations Committee developed a new Public Awareness Tool Kit (in both English and French) for fundraising professionals across Canada. This tool kit includes guides on the following topics:

- Know Your Parliament
- Building Relationships: A Framework for Engagement
- Getting the Meeting You Want
- How to Handle Yourself in a Meeting with a Parliamentarian
- Making an Elevator Pitch to a Parliamentarian

The tool kit was generously funded by Canadian foundation donors. We would like to thank Don Johnson and Every Member Campaign donors for their generous support of this project.

The tool kit can be downloaded from the Canadian foundation page of the AFP website, [www.afpnet.org](http://www.afpnet.org). ♦

## AFP Diversity and Inclusion Summit

The AFP Foundation for Philanthropy and the AFP Foundation for Philanthropy–Canada were proud partners in funding the AFP Diversity and Inclusion Summit held in Pittsburgh in October 2013. AFP, D5 Coalition and Joint Affinity Groups (JAG) co-convened the summit, where almost 60 people came together to talk about a collective action leading to greater inclusiveness in fundraising and philanthropy.

### The agenda focused on three questions:

1. How can the Association of Fundraising Professionals and other fundraising professional groups ensure that their memberships and the fundraising profession reflect all of the diversity and richness in the communities they serve?
2. What can the fundraising community do to ensure that all who want to be a part of the profession feel welcome and engaged?
3. How can the entire philanthropic community feed the pipeline of future fundraising professionals to ensure that the profession continually strives to reflect the communities they serve and welcomes all who want to be a part of the profession?

### As a result of the summit, a five-year action plan was drafted for the profession focusing on six areas.

#### 1. Research

- Partner with other organizations to define parameters and develop research questions and methodology.

#### 2. Staffing and Operations/Administration

- Develop education around the benefits of diversifying fundraising staff and how to recruit and retain diverse staff.
- Develop resources on goal setting and metrics to measure success in inclusiveness initiatives.
- Develop resources that lead to human resources recruitment.

#### 3. Governance

- Encourage AFP chapters to include diversity and inclusion in chapter programs on governance.

#### 4. Education and Professional Development

- Partner with organizations that represent diverse communities to provide mentoring opportunities for new professionals.

- Incorporate instruction on diversity and inclusion at all levels and through a variety of venues—seminars, webinars, current course offerings, etc.—and include diverse cultural examples in educational materials.

#### 5. Terminology and definitions

- Develop a “key” to language used in the diversity and inclusion realm.

#### 6. Marketing and communications

- Create outreach vehicles to diverse communities, including the online *Kaleidoscope* newsletter, social media, white papers, etc.

Increasing inclusiveness in the fundraising profession is a strategic goal for both foundations and AFP, and we strive to work together to further this important initiative for the profession. ♦



Pictured (from l to r) are Krishan Mehta, executive director, campaign, Ryerson University; Jaye Lopez Van Soest, CFRE, development director, UDC David A. Clarke School of Law; James K. Phelps, ACFRE, principal, JKP Fundraising LLC (Phelps and Van Soest served as co-chairs of the Diversity and Inclusion Summit planning committee); Janice Gow Pettey, CFRE, Ed.D., founder and principal, J.G. Pettey & Associates; Paul Bachleitner; project director, Joint Affinity Groups (JAG); Alexis Terry, director, diversity and inclusion, American Society of Association Executives (ASAE); Andrew Watt, FlinstF, AFP president and CEO.

### Special thanks to the Diversity and Inclusion Summit sponsors:

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AFP Foundation for Philanthropy–Canada

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#### LUNCHEON SPONSOR

AFP Washington DC Metro Area Chapter

#### SUSTAINING SPONSORS

D5 Coalition

AFP PA, Greater Philadelphia Chapter

AFP Oregon and SW Washington Chapter

AFP PA, Western Pennsylvania Chapter

## AFP's Leadership Society Continues to Grow

The Leadership Society honors 78 AFP members who actively support the work of AFP, the AFP Foundation for Philanthropy and the AFP Foundation for Philanthropy–Canada.

Leadership Society members also demonstrate their commitment to AFP in many other important ways. They frequently serve as board and committee members, mentors and advisers and remain actively

engaged in providing counsel to advance ethical and effective fundraising internationally. A global perspective and vision characterize members of the Leadership Society. It is not surprising that 61 Leadership Society members are also Omega Circle members who have made planned gifts to support future fundraisers as leaders to help change the world for the better. ♦

### Leadership Society Members

James H. Allen, ACFRE

Anthony R. Alonso

Helen B. Arnold, CFRE Ω

Terry B. Axelrod

Ron Bailey, CFRE

William F. Bartolini, Ph.D.,  
ACFRE Ω

**Joan V. Black, CFRE**

Brian J. Bonde, ACFRE Ω

Timothy R. Burcham, CFRE Ω

**Bob Carter, CFRE Ω**

**Barbara L. Ciconte, CFRE Ω**

**Mark Climie-Elliott, CFRE Ω**

Vincent F. Connelly

Stephanie Cory, CAP, CFRE Ω

**Shirlene Courtis, CFRE Ω**

**David M. Coyne, CFRE Ω**

Curtis C. Deane, CFRE, CAE Ω

Scott Decksheimer, CFRE

D. C. Dreger, ACFRE Ω α

**Lona M. Farr, Ph.D., ACFRE Ω**

Patrick J. Feeley, CFRE Ω

**Alice L. Ferris, ACFRE Ω**

Kevin J. Foyle, CFRE Ω

**Jay Frey, CFRE Ω**

**Paul M. Gardner, Ph.D. Ω**

**Amanda Gellman Ω**

**Walter R. Gillette, III, ACFRE Ω**

Marshall H. Ginn, CFRE Ω

Gary L. Good, CFRE Ω

Pati Greenwood, CFRE Ω

**Margaret A. Guellich, CFRE Ω**

Lori Gusdorf, CAE Ω

Ann M. Hale, CFRE Ω

**Robbe A. Healey, MBA, NHA,  
ACFRE Ω**

Les Helmuth, CFRE

Marnie Hill, CFRE Ω

**Suzanne Hittman Ω**

**Susan Earl Hosbach, CFRE Ω**

John Kelleher, CFRE Ω

Marcia Kerz, CFRE

Audrey P. Kintzi, ACFRE Ω

Martha M. Kirkland Ω

**Shauna Klein, M.A. Ω**

Barbara Larkin Ω

Sharon LeeMaster, CFRE Ω

Barbara R. Levy, ACFRE Ω

**Stephen M. Levy, CFRE Ω**

Tania Little, CFRE Ω

Timothy D. Logan, ACFRE

Christopher Looney

**James K. and Claudia A.  
Looney, FAHP Ω**

Harry Lynch, CFRE Ω

**Linda Lysakowski, ACFRE Ω**

David J. Madson, ACFRE Ω

**Andrea McManus, CFRE Ω**

**Sen. Terry M. Mercer, CFRE Ω**

**Thomas W. Mesaros, CFRE Ω**

**Ann H. Moffitt, ACFRE Ω**

Luce Moreau, CFRE Ω

**Colette M. Murray, J.D.,  
CFRE Ω**

Gwenn M. and Mark A. Neville,  
CFRE Ω

**Nicholas Offord**

Mark S. Peterson, CFRE

**Janice Gow Pettey, Ed.D., CFRE Ω**

Jill A. Pranger, ACFRE Ω

**Paul Pribbenow, Ph.D., CFRE**

**Nancy K. Racette, CFRE Ω**

**Susan F. Rice, Ed.D., ACFRE Ω**

**Patricia Rich, ACFRE**

**Donald G. Rizzo, CFRE Ω**

Martha H. Schumacher, ACFRE Ω

**Philip G. Schumacher, ACFRE Ω**

Steven S. Smith, CFRE

**Scott C. Staub, ACFRE Ω**

**Dennis Stefanacci, ACFRE Ω**

**Don W. Taylor, CFRE Ω**

Lucinda and Andrew Watt, FInstF Ω

David P. Whitehead

**Charter members appear in  
bold type**

Ω Omega Circle Members

α Alpha Society Members

*Reported as of Feb. 20, 2014*

## Board Leadership and Service Strengthen the Capacity of the AFP Foundations

Leadership and service are the greatest assets for any organization that strives for excellence. These are priceless gifts for charitable organizations such as the AFP foundations in North America whose missions promote ethical and effective fundraising that will shape philanthropy in every segment of society.

The AFP Foundation for Philanthropy and the AFP Foundation for Philanthropy–Canada are pleased to announce the members of their respective boards of directors for 2014. These truly committed women and men are a wellspring of energy and talent for our foundations. They come from all sectors of the AFP membership with a shared responsibility to serve as advocates to advance philanthropy in Canada and the United States.

### Community Spirit Grant Program

In 2013, the AFP Foundation for Philanthropy–Canada received a Community Spirit Grant from the government of Alberta through the Alberta Lottery Fund in order to build strong communities and enhance the quality of life for Albertans. The foundation is grateful for this grant and used it to fund five separate programs or individuals in Alberta in 2013.

The funds were for specific educational programs in Edmonton on “Future Fit: New Ways to Think About Strategy and Fundraising,” and in Calgary for its National Philanthropy Day® celebration, “Building Partnerships for Good.” The funds also supported the live stream webcast held at the Banff Compass Conference titled “The Psychology of Giving,” which had more than 300 participants.

In addition, two Albertans received scholarships, one to study for the Certified Fund Raising Executive (CFRE) credential and the other to complete studies at Mount Royal University’s Nonprofit Management Extension Certificate.

The AFP Foundation for Philanthropy–Canada is grateful to the government of Alberta for this opportunity and partnership to strengthen the fundraising profession in the province. ♦

“This is an especially exciting time for the U.S. foundation as we embark on a year of transition in which we are restructuring our annual giving campaigns and launching a brand new major gifts initiative. This calls for a team with vision, broad perspective and the capacity for innovation as we create new fundraising programs and refine our message to build the foundation for the future,” says Kevin J. Foyle, CFRE, chair of the AFP Foundation for Philanthropy. “The 2014 AFP foundation board is that ‘Dream Team’ of colleagues with both the experience and talent to lead the wave of change.”

Among its strategic initiatives for the year ahead, the AFP Foundation–Canada will continue its commitment to diversity and inclusion and a robust research agenda. “In Canada, having willing ambassadors who serve with passion is critical to our foundation’s success,” says Scott Decksheimer, CFRE, chair of the AFP Foundation–Canada. “It is a privilege as chair, and at times a bit daunting, to comprehend the wealth of knowledge and depth of commitment my colleagues on the board bring to our deliberations and the execution of our plans.”

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Kevin J. Foyle, CFRE



Scott Decksheimer, CFRE

### 2013 Foundation Donors Made a Difference

The AFP Foundation for Philanthropy and the AFP Foundation for Philanthropy–Canada would like to thank all of our donors whose 2013 gifts helped us advance ethical and effective fundraising. Through your gifts, each of you has helped make a difference in the future of the fundraising profession.

To see a list of all 2013 donors, please visit [www.afpnet.org/2013donors](http://www.afpnet.org/2013donors). ♦

## Board Leadership and Service Strengthen the Capacity of the AFP Foundations

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Foyle and Decksheimer acknowledge the engagement, passion and the incredible pool of experience members of their respective boards bring to the board table. Collectively, the members of the two foundation boards represent 805 years of AFP membership and records of service to their professional community. “It’s no surprise that these amazing leaders are both the moral and strategic

compass for the profession as we navigate the changing course of philanthropy,” Foyle adds.

For more information or to contribute to any of the AFP foundations’ projects or programs, please contact the AFP Foundation for Philanthropy at [fdn@afpnet.org](mailto:fdn@afpnet.org) or (800) 666-3863, or the AFP Foundation–Canada at [cdnfoundation@afpnet.org](mailto:cdnfoundation@afpnet.org) or (416) 941-9144. ♦

## Introducing the Board Members of the AFP Foundation for Philanthropy and AFP Foundation for Philanthropy–Canada

### AFP Foundation for Philanthropy

**Kevin J. Foyle, CFRE Ω (chair)**  
AFP TX, Greater Houston Chapter  
Vice President for Development  
UT Health Science Center  
Houston, Texas

**Susan Earl Hosbach, CFRE Ω (chair-elect)**  
AFP TN, Nashville Chapter  
President and CEO  
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Nashville, Tenn.

**Gary L. Good, CFRE Ω (immediate past chair)**  
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Senior Executive for Special Campaigns  
Pacific Symphony  
San Juan Capistrano, Calif.

**Alan R. Hutson, CFRE Ω (vice chair, development)**  
AFP VA, Central Chapter  
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AFP SD, South Dakota Chapter  
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AFP MN, Southern Minnesota Chapter  
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**William F. Bartolini, ACFRE, Ph.D. Ω**  
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Beyond Fundraising LLC  
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**Marshall H. Ginn, CFRE Ω**  
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Managing Director  
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**Christopher Looney**  
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Community Counselling Service (CCS)  
Irvine, Calif.

**Linda Lysakowski, ACFRE Ω**  
AFP NV, Las Vegas Chapter  
President  
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Boulder City, Nev.

**Kurt Mische**  
AFP NV, Sierra Chapter  
President and CEO  
KNPB Channel 5  
Reno, Nev.

**Terry L. Monteleone, CFRE, CSPG**  
AFP CA, Greater Los Angeles Chapter  
Principal  
TLM Consulting  
Topanga, Calif.

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**Board Members** (Continued)**Amy Brewster Parrott, CFRE**

AFP CA, San Diego Chapter  
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**Jill A. Pranger, ACFRE**  $\Omega$ 

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CFRE**  $\Omega$ 

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 Ctr., I.A.P.  
 Mexico, D.F.

**Donald G. Rizzo, CFRE**  $\Omega$ 

AFP KY, Greater Louisville Chapter  
 Associate Vice President for Development  
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AFP WA, Washington Chapter  
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 Seattle, Wash.

**Melissa (Missy) Ryan, CFRE**

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**Carol Van Natta**

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 Foundation  
 Vancouver, Wash.

**Lindsay L. Wilson, M.S., CFRE**

AFP TX, San Antonio Chapter  
 Director of Development  
 University of Texas Medical Branch  
 Galveston, Texas

**Ex officio (with vote)****Andrew Watt, FInstF**  $\Omega$ **Bob Carter, CFRE**  $\Omega$ **Patrick J. Feeley, MBA, CFRE**  $\Omega$ **Scott Decksheimer, CFRE**  $\Omega$ **AFP Foundation for  
Philanthropy—Canada****Scott Decksheimer, CFRE (chair)**

AFP AB, Calgary & Area Chapter  
 President and Principal Consultant  
 Nine Lions Development Consulting  
 Calgary, AB

**Leah G. Eustace, CFRE**  $\Omega$   
(chair-elect)

AFP ON, Ottawa Chapter  
 Managing Partner  
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**Darcie Acton, CFRE**  $\Omega$  (secretary)

AFP AB, Edmonton & Area Chapter  
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 Milestone Consulting  
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**Roger D. Ali, CFRE**  $\Omega$  (treasurer)

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 Vice President, Development  
 Hamilton Health Sciences Foundation  
 Hamilton, ON

**Michael House, CFRE**  $\Omega$   
(vice chair, fundraising)

AFP AB, Edmonton & Area Chapter  
 President and CEO  
 Stollery Children's Hospital  
 Foundation  
 Edmonton, AB

**Pati Greenwood, CFRE**  $\Omega$   
(immediate past chair)

AFP ON, Greater Toronto Chapter  
 Vice President, Resource Development  
 Women's College Hospital Foundation  
 Toronto, ON

**Nowshad Ali, CFRE**

AFP SK, Saskatoon Chapter  
 President and CEO  
 On Purpose Leadership Inc.  
 Saskatoon, SK

**Ron Bailey, CFRE**

AFP Manitoba Chapter  
 President  
 Ron Bailey and Associates  
 Winnipeg, MB

**Joan V. Black, CFRE**

AFP AB, Calgary & Area Chapter  
 President  
 Black Fund Development Inc.  
 Calgary, AB

**Alice Ferris, ACFRE**  $\Omega$ 

AFP AZ, Northern Chapter  
 Partner  
 GoalBusters  
 Flagstaff, Ariz.

**Kevin J. Foyle, CFRE**  $\Omega$ 

AFP TX, Greater Houston Chapter  
 Vice President for Development  
 UT Health Science Center  
 Houston, Texas

**Sharon Lee, CFRE**

AFP ON, Greater Toronto Chapter  
 Executive Director  
 Canadian Council of Human  
 Resources Association  
 Toronto, ON

**Deborah Legrove, CFRE**

AFP ON, Golden Horseshoe Chapter  
 President  
 Crawford Connect  
 Toronto, ON

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## Board Members *(Continued)*

**Emma Lewzey, CFRE**

*AFP ON, Greater Toronto Chapter  
Senior Major Gifts Officer  
St. Michael's Hospital Foundation  
Toronto, ON*

**Timothy R. Maloney**

*AFP BC, Vancouver Island Chapter  
National Executive Director  
Mercy Ships Canada  
Victoria, BC*

**Luce Moreau, CFRE Ω**

*AFP Quebec Chapter  
Chief Executive Officer  
Fondation Y Des Femmes Montreal  
Montreal, QC*

**Nichole Penney**

*AFP NE, Newfoundland and  
Labrador Chapter  
Manager, Revenue Development  
Canadian Cancer Society  
St. John's, NL*

**Janice Waud Loper, CFRE Ω**

*AFP BC, Vancouver Chapter  
Vice President, Development  
Tapestry Foundation for Health Care  
Vancouver, BC*

**Andrew Watt, FInstF Ω**

*President and CEO  
Association of Fundraising  
Professionals  
Arlington, Va.*

**Kim Willis-More, CFRE**

*AFP ON, Canada South Chapter  
Senior Manager, Fund Development &  
Community Engagement  
Canadian Mental Health  
Association—Windsor/Essex County  
Branch  
Windsor, ON*

Ω *Omega Circle Members*



## Canada Not-For-Profit Corporation Act Compliance

**T**he Canada Not-For-Profit Corporations Act is new legislation introduced in October 2011 for all federally incorporated nonprofits. Every federal corporation incorporated under the Canada Corporations Act is required to file Articles of Continuance with the Minister of Industry by Oct. 17, 2014. Failing to do so, a corporation is subject to involuntary dissolution by the Minister of Industry.

The AFP Foundation for Philanthropy–Canada has worked with Carters Professional Corporation based in Ottawa, Ontario, to ensure that all the new requirements are completed prior to the deadline. A special members meeting of the foundation will take place in San Antonio in March in order to adopt the new bylaws and approve the Article of Continuance.

What does this mean for the foundation? Moving forward, the annual general meeting of the foundation will take place via conference call each June to accept the audited financial statements, approve the board of directors slate and approve the following year's auditor. With the new compliance, the board of directors' terms will change to a July 1–June 30 year. However, the foundation will continue to operate on a calendar fiscal year.

The AFP Foundation for Philanthropy–Canada is on track to meet the required deadline for complying with the new Act. ♦

## 2013 Annual Fund Award Winners Announced

The AFP Foundation for Philanthropy and the AFP Foundation for Philanthropy–Canada recognize outstanding chapter performance in the annual fund each year. There are three award categories in which awards are given to chapters that reach the highest level within each group of like-size chapters: the Every Member Campaign Award of Excellence, Highest Percent Member Participation and the Highest Chapter Treasury Gift.

“2013 again proved to be a record-breaking year for the Every Member Campaign in Canada. The generosity of our members, the dedication of our volunteers and the systems that our partners in A.K.A. New Media and Stratcom bring to the foundation combine to make it the success that it is,” says Lori Gusdorf, CAE, executive director of the AFP Foundation for Philanthropy–Canada.

“We are very proud of our Alpha Society monthly giving program, which represented 57 percent of donations in 2013. Our success came about as a result of a total team effort, and on behalf of the AFP Foundation for Philanthropy–Canada, it’s my pleasure to offer sincere thanks and congratulations to all participants.”

“The accomplishments of the award-winning chapters are a great credit to the commitment and hard work of their members,” adds Martha Kirkland, executive vice president of the AFP Foundation for Philanthropy. “We congratulate and thank our colleagues for their inspiration and support.”

The award winners are formally recognized at AFP’s International Conference on Fundraising during the Chapter Presidents Council meeting on Sunday morning, and each award comes with a certificate and a monetary gift to use for chapter activities. ♦

### 2013 Annual Fund Award Winners by Chapter Size

#### 2013 Every Member Campaign Award of Excellence

- 15–50 members chapter: AFP MN, Southern Chapter (\$3,615)
- 51–10 members chapter: AFP Alabama Chapter (\$4,554)
- 101–250 members chapter: AFP VA, Central Chapter (\$10,662)
- 251–400 members chapter: AFP AB, Calgary & Area Chapter (\$25,450)
- 401+ members chapter: AFP ON, Greater Toronto Chapter (\$39,795)

#### 2013 Highest Percent Member Participation

- 15–50 members chapter: AFP MN, Southern Chapter (81.25%)
- 51–10 members chapter: AFP VA, Shenandoah Chapter (53.13%)
- 101–250 members chapter: AFP FL, Suncoast Chapter (41.59%)

- 251–400 members chapter: AFP AZ, Greater Arizona Chapter (26.32%)
- 401+ members chapter: AFP MO, St. Louis Regional Chapter (20.91%)

#### 2013 Highest Chapter Treasury Gift

- 15–50 members chapter: AFP CA, Greater San Fernando Valley Chapter; AFP IA, Greater Tri-State Chapter; AFP MD, Western Chapter; AFP MN, Southern Chapter (\$500)
- 51–10 members chapter: AFP Mississippi Chapter (\$1,000)
- 101–250 members chapter: AFP CA, Orange County Chapter (\$2,000)
- 251–400 members chapter: AFP TX, Greater Dallas Chapter (\$2,600)
- 401+ members chapter: AFP TX, Greater Houston Chapter (\$5,000)

## Strategic Partners Are True Partners

The AFP Foundation for Philanthropy and the Foundation for Philanthropy–Canada appreciate the great partnerships and sustaining support from several organizations that have added significant resources and value to our work. We thank our strategic partners internationally and acknowledge the many ways their investments have empowered our organizations to address important strategic initiatives.

In Canada, Mackenzie Investments in Toronto has again provided a generous grant to the foundation to fund scholarships and national education webinars in 2014. Mackenzie's support allows the foundation to offer its National Scholarship Program, which provides assistance for fundraising professionals to participate in educational opportunities that are critical to their professional growth and career development. Mackenzie also funds the complimentary webinars that are available to all fundraising professionals throughout Canada. The first webinar in 2014 will focus on the *What Canadian Donors Want* research recently conducted by Ipsos Reid and the foundation.

Strategic Communications Inc. (Stratcom) provided pro bono telefundraising support for the Canadian foundation. This partnership is six years strong, and in 2013, the campaign raised more than \$11,300.

AKA New Media has provided pro bono e-philanthropy support for the past six years and allows Canadian donors to give online through chapter specific websites as well as the foundation overall. In 2013, the foundation raised more than \$17,000 through this online portal.

In the United States, the AFP Foundation for Philanthropy expresses great appreciation to RuffaloCODY for the sustained commitment and pro bono support generously provided by the company. For the past five years, RuffaloCODY has conducted the foundation's annual calling program, which is the centerpiece of the foundation's Every Member Campaign. In 2013, calling staff from RuffaloCODY contacted nearly 17,000 AFP members in the United States and raised more than \$153,000 for the foundation's annual campaign. We are pleased to announce that RuffaloCODY will continue its invaluable commitment to the **BE the CAUSE Campaign** in 2014.

Long-term partners Bob Carter Companies and The Alford Group are essential to the sustainability of key programs such as the Award for Outstanding Youth in Philanthropy and the Diversity Art Showcase, respectively. The AFP foundation is genuinely thankful



for this ongoing support and the dedication they show to fostering the spirit of philanthropy in youth and inclusiveness of all in the profession.

The AFP foundation is also grateful for the professional counsel provided pro bono by Blackbaud to inspire a new, creative concept for our annual giving program. Blackbaud's marketing team crafted the platform upon which the new look and message points were developed. The results of Blackbaud's consultation—"I give because"—will appear throughout the year in the foundation's new campaign for 2014, **BE the CAUSE**, as we reach out to donors and AFP chapter members.

Fundraising Initiatives North America returns this year as an AFP foundation pro bono strategic partner to conduct face-to-face fundraising during the 2014 AFP International Conference on Fundraising. Funds raised through this initiative, which is part of the new **BE the CAUSE Campaign**, will support diversity scholarships. Promoting diversity and inclusion in the fundraising profession is an important priority for AFP, and we are privileged to have the support of Fundraising Initiatives in this effort.

A grant received in 2014 from the StubHub Foundation, an advised fund of the Silicon Valley Community Foundation, positions the AFP foundation to study strategies for special events fundraising. Research findings will identify changes and trends in special events management. In turn, this information will inform future practices to enhance the planning and implementation of successful fundraising special events, with an emphasis on the use of technology.

Important partnerships such as these make all the difference in the capacity of the foundations in Canada and the United States to broaden their horizons and impact. ♦