Foundations to Focus on Key Initiatives

Strategic initiatives link the Association of Fundraising Professionals, the AFP Foundation for Philanthropy and the AFP Foundation for Philanthropy–Canada in securing major gifts to advance the fundraising profession.

In 2011, the AFP foundation will solicit major gifts to support 10 strategic initiatives that are aligned with four major areas within the profession:

- Strengthening the profession by educating external audiences
- Building knowledge to develop superlative practitioners
- Advancing diversity within the profession by seeking, embracing and engaging diverse individuals, groups and organizations
- Preparing for the future by engaging young professionals and youth in exploring careers in fundraising

The AFP foundation successfully secured major gifts to support strategic initiatives in 2010 including the AFP Research Think Tank on Regulation, Ethics and Philanthropy; AFP’s 50th anniversary; and the Leadership Academy. Four AFP chapters in the United States and Canada, five individual donors and the Lilly Endowment added major gifts to support the AFP 50th Anniversary Campaign, which began in 2009. With their generosity the campaign raised almost $100,000 directed to commemorative projects, a new and comprehensive ethics curriculum and the foundation’s Fund for the Future.

“Major gifts in 2010 empowered our colleagues to demonstrate best practices as a result of the knowledge they gained through dynamic educational programs offered by AFP,” said Gary Good, CFRE, chair of the AFP Foundation for Philanthropy. “We were honored to partner with the Edyth Bush Charitable Foundation as the leading sponsor of AFP’s 2010–2011 Think Tank. It was truly a cutting-edge educational opportunity, in both content and design. The think tank blended regional webinar conferences with a meeting in Orlando, Fla., to generate a blue ribbon report on the impact of regulation and ethics across the nonprofit sector.”

The AFP foundation is most appreciative of the vision and commitment of the Edyth Bush Foundation in supporting programs that promote excellence in fundraising.

In addition, the AFP Greater Houston Chapter stepped forward in 2010 to sponsor the AFP Leadership Academy through 2014. Chapter members unanimously approved this major investment in professional development that will benefit the entire nonprofit community. Speaking on behalf of the Greater Houston Chapter, Michael Delzotti, CFRE, director of development at the University of Texas M.D. Anderson Cancer

Continues on page 2.
Center in Houston and immediate past president of the chapter, said, “Our hope is that this commitment will reap great benefits for the many communities that depend on AFP to uphold excellence in our profession. As this is a gift in the vein of service, the Greater Houston Chapter looks forward to our gift being eclipsed by a larger investment from one of our compatriot chapters.”

The AFP foundation is honored to partner with the Greater Houston Chapter and applauds the generosity and the spirit of altruism this contribution represents.

Good, the 23rd chair of the AFP foundation, is senior executive for special campaigns and major gifts for the Pacific Symphony in Santa Ana, Calif. He has an impres-

AFP Foundation for Philanthropy–Canada’s 2011 Strategic Initiatives

The AFP Foundation for Philanthropy–Canada will focus on the following initiatives in order to achieve its 2011 goals.

- **Translation:** Translate fundraising-related materials into French.
- **Canadian Research:** Promote substantive and objective research on fundraising and philanthropy in Canada.
- **Mentoring Program:** Implement a career-mentoring program for new fundraising professionals that provides professional guidance and fundamental fundraising skills.
- **Scholarships:** Deliver effective training for the new generation of philanthropic leaders through scholarships.
- **Education:** Develop greater awareness and increase dialogue on the complexity of issues facing fundraising and the sector and the tools needed to address the issues through educational programming that will create stronger advocates for the profession and the sector.

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. The Steward is published semi-annually by the AFP Foundation for Philanthropy.

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Website: www.afpnet.org/afp_foundation_for_philanthropy/foundation_canada
sive record of leadership and 10 years of volunteer service to AFP and the foundation. In January 2011, six new directors, who bring a wealth of knowledge and experience, joined the board. The foundation is pleased to welcome Diane M. Carlson, president and CEO of 1-2-1 Philanthropic Services Inc., in Henderson, Nev.; Christopher K. Looney, regional vice president of CCS in Irvine, Calif.; Alan R. Hutson Jr., CFRE, principal of the Monument Group in Richmond, Va.; Mark A. Neville, CFRE, director of corporate and foundation relations at the Mayo Clinic in Rochester, Minn.; Karen Rotko-Wynn, CFRE, senior vice president–west division, The Alford Group in Seattle; and Cynthia L. Schmidt, CFRE, chief development officer, The Association House of Chicago in Chicago.

AFP Foundation for Philanthropy’s 2011 Strategic Initiatives

The AFP Foundation for Philanthropy will focus on developing skilled practitioners and creating positive member experiences that allow fundraisers to meet the challenges facing them today and in the future.

**Strengthening the profession by educating external audiences**

1. **Ethics curriculum**: Develop a cutting-edge, comprehensive and standardized ethics curriculum tailored to the educational needs of fundraising professionals, nonprofit administrators and those transitioning into the sector.

2. **Research think tank**: Foster constructive dialogue among researchers and fundraising practitioners concerning regulation of the sector and ethical practice that engender public trust.

3. **Research grants**: Provide continuing support of substantive and objective research to build the body of knowledge in fundraising and philanthropy.

4. **Scholarships for the Nonprofit Management Institute**: Support participation of senior fundraising executives in the Nonprofit Management Institute offered in partnership with a leading university focused on managerial skills and leadership.

5. **Scholarships for the AFP Fundamentals of Fundraising course**: Support the development of new fundraising executives with less than five years of experience in the profession.

6. **AFP educational programming in chapters**: Collaborate with AFP chapters to conduct seminars focused on high-profile issues in philanthropy and fundraising.

7. **2011 Leadership Academy**: Provide comprehensive leadership development for philanthropy and fundraising professionals from diverse communities worldwide.

8. **Diversity scholarships**: Create the AFP Diverse Communities Conference Scholarship Fund to provide financial assistance for AFP members who identify themselves as coming from a diverse community and/or who are employed by organizations that primarily serve diverse populations.

**Advancing diversity within the profession by seeking, embracing and engaging diverse individuals, groups and organizations**

**Preparing for the future by engaging young professionals and youth**

9. **Youth in Philanthropy**: Inaugurate an AFP Youth in Philanthropy curriculum in 2011 to encourage, promote and recognize youth in philanthropy.

10. **Collegiate Chapter Leaders Program**: Develop and train leaders in the AFP collegiate chapter program.
Record 40 New Members Join Omega Circle Class

In the historic year in which AFP marked its 50th anniversary, the Omega Circle made history of its own. In tribute to AFP’s 50th anniversary year, the Omega Circle welcomed 40 new members. 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 the new Omega Circle members at an induction dinner held in Las Vegas last October in conjunction with the AFP Leadership Academy and the AFP and AFP foundation board meetings. The evening celebrated the investment in the future of the profession represented by the generous planned-gift commitments of the 2010 Omega Circle class. During dinner, members of the class shared their personal motivation for making a planned gift to AFP. Thirteen of the 2010 class members added to their prior Omega Circle gifts in commemoration of AFP’s milestone anniversary.

Master of ceremonies for the evening and then-chair of the AFP foundation in Canada, Shauna Klein, M.A., described making a planned gift as “a thoughtful and very personal expression of leadership, vision and passion. We can’t begin to imagine the ways in which planned giving will enrich the profession in years to come.” Klein asserted that it is “our passion for AFP that motivates us to invest in future generations and empower them to be the best fundraisers they can be in our cherished profession.”

Members of the Omega Circle class of 2010.

Omega Circle Class of 2010

- Darcie Acton, CFRE
- Ronald F. Barisano, CFRE (2009)
- Brian J. Bonde, ACFRE
- June J. Bradham
- Timothy R. Burcham, CFRE
- Melinda Conway Callahan, CFRE
- Thomas J. and Nancy S. Clark (2004)
- Tanya and David M. Coyne, CFRE
- Mo Davies, CFRE
- Yvette and Michael Delzotti, CFRE (2009)
- Jason R. Demers, CFRE
- Leah Eustace, CFRE
- Amanda Gellman
- Mary Jean Gilbert, CFRE (1999, 2002)
- Theresa F. Haenn, CFRE
- Sean D. Hammerle, CFRE (2008)
- William A. Harrison
- Roberta A. Healey MBA, NHA, ACFRE (2001)
- Susan Earl Hosbach, CFRE (2004)
- Michael House, CFRE
- John Elliott Jodlin, CFRE (2009)
- Martha and JR Kirkland
- Tania Little, CFRE (2009)
- Grant E. Martin, CFRE
- Ken Mayhew
- Joyce Mitchell-Antoine, CFRE, and Phillip Antoine
- William M. Moran, FAHP, ACFRE (1992)
- M. Anne Murphy, CFRE
- Edie Newton
- Nicci Noble, CFRE
- Lori Hunter Overmyer, CFRE
- Meredith Poland
- Jane Potentier, CFRE
- Debra Ramage
- Karen Rotko-Wynn, CFRE
- Roberto Soto-Acosta
- Rhonda Starr
- Scott C. Staub, ACFRE (1999)

Note: Those with prior Omega Circle class designation(s) in the years displayed in parentheses made an additional gift in 2010.
2010 Annual Fund Award Winners Announced

The AFP Foundation for Philanthropy and AFP Foundation for Philanthropy–Canada recognize outstanding chapter performance in the annual fund each year. There are three award categories that are given to the 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.

“The fundraising performance of these AFP chapters is an inspiration to all of us and sets a model for other chapters to emulate,” said Curtis C. Deane, CFRE, CAE, president of the foundation. “I offer congratulations and appreciation for the volunteers’ hard work.”

Laura Gatensby, CFRE, chair of the Every Member Campaign in Canada, added, “2010 was a record-breaking year for the Every Member Campaign in Canada for many reasons—the considerable generosity of our members, the dedication of our volunteers and the support of our partners Stratcom and AKA New Media. Also, our board participation campaign was a huge success, with 99 percent of chapter board members across Canada supporting the campaign. This was a team effort in the truest sense, and on behalf of the AFP Foundation for Philanthropy–Canada it’s my pleasure to offer sincere thanks and congratulations to all of our participants.”

The award winners will be formally recognized at AFP’s International Conference on Fundraising during the Chapter Presidents’ Council meeting on Sunday morning, March 20, and each award comes with a certificate and a monetary gift to use in chapter activities.

2010 Every Member Campaign Award of Excellence

- 15–50 members chapter: AFP CA, Desert Communities Chapter—$2,965
- 51–100 members chapter: AFP WI, Upper Mississippi Valley Chapter—$4,200
- 101–250 members chapter: AFP CA, Orange County Chapter—$8,985
- 251–400 members chapter: AFP AB, Calgary & Area Chapter—$24,768
- 401+ members chapter: AFP ON, Greater Toronto Chapter—$34,343

2010 Highest Percent Member Participation

- 15–50 members chapter:
  - AFP GA, Middle Chapter—100 percent
  - AFP PA, Pocono Mountains Chapter—100 percent
- 51–100 members chapter: AFP WI, Upper Mississippi Valley Chapter—70.49 percent
- 101–250 members chapter: AFP FL, Suncoast Chapter—55.25 percent

2010 Highest Chapter Treasury Gift

- 15–50 members chapter:
  - AFP CA, Greater San Fernando Valley Chapter—$500
  - AFP FL, Treasure Coast Chapter—$500
  - AFP MN, Southern Minnesota Chapter—$500
- 51–100 members chapter:
  - AFP MS, Mississippi Chapter—$800
  - AFP SD, South Dakota Chapter—$800
- 101–250 members chapter: AFP OH, Greater Cincinnati Chapter—$2,500
- 251–400 members chapter: AFP PA, Western Chapter—$2,750
- 401+ members chapter: AFP TX, Houston Chapter—$5,000
One hundred twenty-two U.S. chapters have qualified to receive a 2010 EMC Chapter Partnership Grant from the AFP Foundation for Philanthropy, and 12 Canadian chapters have qualified to receive a 2010 EMC Chapter Partnership Grant from the AFP Foundation for Philanthropy–Canada. The partnership grants represent 25 percent of the total funds received through gifts and pledge payments from each chapter.

The EMC Chapter Partnership Grant program is available to AFP chapters that reach or exceed their Every Member Campaign goal. In order to receive a partnership grant, chapters must submit a grant proposal on how they will use the funds before they are disbursed. Chapters use the partnership grant to help support their local activities, such as educational seminars, scholarships and National Philanthropy Day® events.

“We view the Every Member Campaign as a true partnership effort with AFP chapters. Our goal is for every chapter to qualify for a grant,” said Curtis C. Deane, CFRE, CAE, president of AFP Foundation for Philanthropy.

“At the AFP Foundation for Philanthropy–Canada we are pleased that we reached 107 percent of our goal, and the partnership we have in place with our chapters ensures that success,” said Laura Gatensby, CFRE, Every Member Campaign chair. “We congratulate the 12 Canadian chapters that met their goal.”

---

### 2010 EMC Chapter Partnership Grant Recipients

- AFP AB, Calgary & Area Chapter
- AFP AB, Edmonton & Area Chapter
- AFP AK, Alaska Chapter
- AFP AL, Alabama Chapter
- AFP AL, Central Chapter
- AFP AL, Gulf Coast Chapter
- AFP AR, Northwest Chapter
- AFP AZ, Northern Chapter
- AFP BC, Vancouver Island Chapter
- AFP CA, Capital Chapter
- AFP CA, Desert Communities Chapter
- AFP CA, Greater Los Angeles Chapter
- AFP CA, Greater San Fernando Valley Chapter
- AFP CA, Inland Empire Chapter
- AFP CA, Monterey Bay Chapter
- AFP CA, Orange County Chapter
- AFP CA, San Diego Chapter
- AFP CA, Santa Barbara/Ventura Counties Chapter
- AFP CA, Silicon Valley Chapter
- AFP CA, Wine Country Chapter
- AFP CA, Yosemite Chapter
- AFP CO, Colorado Chapter
- AFP CT, Fairfield County Chapter
- AFP DC, Washington DC Metro Area Chapter
- AFP DE, Brandywine Chapter
- AFP FL, Arredondo Chapter
- AFP FL, Big Bend Chapter
- AFP FL, First Coast Chapter
- AFP FL, Fort Lauderdale/Broward Chapter
- AFP FL, Indian River Chapter
- AFP FL, Miami-Dade County Chapter
- AFP FL, Nature Coast Chapter
- AFP FL, Palm Beach County Chapter
- AFP FL, Polk County Chapter
- AFP FL, Southwest Chapter
- AFP FL, Space Coast Chapter
- AFP FL, Suncoast Chapter
- AFP FL, Treasure Coast Chapter
- AFP FL, West Chapter
- AFP GA, Coastal Chapter
- AFP GA, Greater Atlanta Chapter
- AFP GA, Middle Chapter
- AFP HI, Aloha Chapter
- AFP IA, Central Chapter
- AFP IA, Eastern Chapter
- AFP IA, Northeast Chapter
- AFP IA, Siouxland Chapter

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2010 EMC Chapter Partnership Grant Recipients *(Continued)*

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New Fund Honors Paulette Maehara

In honor and recognition of Paulette V. Maehara, CFRE, CAE, and her 13 years of service as president and CEO of AFP, the AFP foundations have created the Paulette Maehara Innovation Fund. Under Maehara’s leadership AFP has made great strides in programming, member services, public awareness and international relations.

“During Paulette’s tenure, significant growth in Canada occurred both in our membership numbers and in the services we are able to provide to members—through the AFP Foundation for Philanthropy–Canada and our government relations activities and in the establishment of the AFP Canadian Council and staff office,” said Pati Greenwood, CFRE, vice president, resource development, Women’s College Hospital Foundation in Toronto and chair of the AFP Foundation for Philanthropy–Canada. “The Paulette Maehara Innovation Fund is a non-endowed fund established in both Canada and the United States, and funds will be used to enhance the infrastructure in both countries. Paulette wanted a mechanism to encourage and reward innovation and forward thinking at AFP, and we believe this fund is the perfect way to keep her legacy to the association strong.”

Curtis C. Deane, CFRE, CAE, president of the AFP Foundation for Philanthropy, added, “Change and innovation have been hallmarks of Paulette’s tenure. The new fund will enable AFP to continue to improve and innovate as the fundraising profession moves forward in the 21st century.”

Individuals, AFP chapters, nonprofits and for-profit organizations are all invited to salute Maehara’s contributions by making a gift to the new fund. Contact the AFP foundations for additional information. For the U.S. foundation, call 800-666-3863 or e-mail foundation@afpnet.org. In Canada, call 416-941-9144 or e-mail cdnfoundation@afpnet.org.

Business Partners Make All the Difference

The AFP Foundation for Philanthropy is pleased to announce its continued partnership with RuffaloCODY to solicit gifts from AFP members across the country in 2011 for the Every Member Campaign.

In 2010, callers from RuffaloCODY contacted more than 9,000 AFP members and raised almost $180,000 for the 2010 EMC.

“We are greatly appreciative of the tremendous continued support RuffaloCODY is providing for the 2011 Every Member Campaign,” said Curtis C. Deane, CFRE, CAE, AFP foundation president. “The professional and personalized conversations with our donors that the calling program provides will enhance our donor-relations efforts and will certainly contribute greatly to the success of the 2011 EMC calling program.”

At the 2010 Canadian Leadership Retreat the AFP Foundation for Philanthropy–Canada had the opportunity to recognize two of its business partners. Strategic Communications Inc. (Stratcom) has provided pro bono telefundraising support for the foundation for four years. In 2010, the campaign started earlier than it had before, which made a significant difference for the foundation: The campaign raised almost $13,000.

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Business Partners Make All the Difference
Continued from page 8.

Also participating in the retreat was AKA New Media Inc., the foundation’s pro bono e-philanthropy partner. AKA, an important partner for the last three years, designed and continues to maintain the online giving websites for each of the AFP Canadian chapters, as well as the foundation overall. This year alone the foundation has raised more than $25,000 through the online giving program.

Having these important partnerships makes all the difference in the success of the AFP Foundation for Philanthropy–Canada’s Every Member Campaign (EMC). Thank you very much—merci beaucoup—to Stratcom and AKA New Media! ◆

Assadour Kirijian, AKA New Media; Shauna Klein, M.A., immediate past chair, AFP Foundation for Philanthropy–Canada; Laura Gatensby, CFRE, chair, Every Member Campaign; Matthew Myers, AKA New Media; and Corinne Bergman, Stratcom.

Foundations to Focus on Key Initiatives
Continued from page 3.

“It is a profound privilege to work with members of the foundation’s energetic and dedicated professionals,” Good added. “Our highest priority in the year ahead is to invest in creative solutions that will support AFP’s 2011 strategic initiatives. Major gifts to the AFP foundation have funded an impressive list of educational programs and resources that are used today by AFP members and chapters to strengthen philanthropy and build the fundraising profession worldwide.”

The AFP Foundation for Philanthropy–Canada also has several important strategic initiatives that it will support in 2011. The foundation is mandated to fundraise to support the mission, goals and strategic priorities of AFP in Canada. Through the provision of grants to chapters, members and nonmembers, and supporting AFP initiatives, the foundation enhances ethical practice, builds satisfying careers and strengthens the sector and society.

To move toward these objectives and its vision, the foundation established the following goals for 2011–2013:

- **Goal No. 1:** Create sector advocates through education
- **Goal No. 2:** Build philanthropic leaders through scholarships
- **Goal No. 3:** Strengthen the sector through career mentoring
- **Goal No. 4:** Foster understanding through research

The Canadian foundation is pleased to welcome its new board members in 2011. They include Sharon Lee, CFRE, director of resource development, ACCES Employment in Toronto, Ontario; Timothy R. Maloney, national executive director, Mercy Ships Canada in Victoria, British Columbia; Anne Melanson, CFRE, partner, Bloom Non Profit Consulting Group in Dartmouth, Nova Scotia; and Kim Willis-More, CFRE, manager of philanthropy, Windsor Regional Hospital Foundation in Windsor, Ontario. All will be serving a two-year term.

Pati Greenwood, CFRE, vice president, resource development, Women’s College Hospital Foundation in Toronto, is the new chair of the AFP Foundation for Philanthropy–Canada. She is the 6th chair of the Canada foundation and has been on the board since 2005. “The Canadian foundation recently completed its case for support with the input of our Canadian leaders and the leadership of Zak Bailey, CFRE, a member in the Greater Toronto Chapter [and associate director, leadership giving, The Princess Margaret Hospital Foundation in Toronto], who provided pro bono assistance in drafting the case,” Greenwood said. “We are very excited to have this roadmap for the foundation in prioritizing our initiatives and building additional resources for our members.” ◆
The AFP Foundation for Philanthropy and the AFP Foundation for Philanthropy–Canada would like to thank all of our donors whose gifts helped us advance ethical and effective fundraising. Through your gifts, each of you has helped to make a difference in the future of the fundraising profession.

2010 Foundation Donors Have Made a Difference

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

Foundation Donors

Distinguished Patron
($100,000–$249,999)
- William A. Harrison
- Robbe A. Healey, MBA, NHA, CFRE
- Paulette V. Machara, CFRE, CAE
- Carol J. Numrich, CFRE

Meritorious Patron
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- Association of Fundraising Professionals*
- RuffaloCODY*
- Campbell and Company**
- Changing Our World**
- CCS**
- Freeman Philanthropic Services**
- Legacy Leaders**

Honored Patron
($25,000–$49,999)
- A.K.A. New Media*
- THE ALFORD GROUP**
- Edyth Bush Charitable Foundation
- Strategic Communications Inc.*

Partner
($10,000–$24,999)
- Claude H. Grizzard Sr.

Patron
($5,000–$9,999)
- Advantage FundRaising Consulting*
- Joan V. Black, CFRE
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Founders’ Club
($3,500–$4,999)
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- D.C. Dreyer, CFRE
- Fundraising Initiatives Inc.*
- Lilly Endowment Inc.
- Donald G. Rizzo, CFRE

Stewards’ Club
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- Barbara L. Cicone, CFRE
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- Philip G. Schumacher, ACFRE
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- James H. Allen, ACFRE
- Helen B. Arnold, CFRE
- Terry B. Axelrod
- Ron Bailey, CFRE
- Michael J. Baker, CFRE
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- Lynn Cronberger, CFRE
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- Laura Fredricks
- Jay Frey, CFRE
- Kenneth C. Frisch, ACFRE
- Amanda Gellman
- Mary Jean Gilbert, CFRE
- Walter R. Gillette, ACFRE

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