Foundations to Focus on Key Initiatives

In its 10 years, the AFP Foundation for Philanthropy—Canada has been a major force in moving forward a philanthropic message and culture throughout the country. In partnership with AFP headquarters and the AFP Foundation for Philanthropy, it has played a leadership role and continues to focus on key programs, including spreading the word through educational opportunities, translating AFP materials into French and establishing a new mentoring program aimed at newcomers to the profession.

At the same time, the AFP Foundation for Philanthropy will focus efforts in 2010 to secure major gifts that will fund 11 major strategic initiatives identified by AFP as priorities for the profession. The foundation’s major-gift program provides critical resources to support programs associated with AFP strategic initiatives that are not generally supported through AFP members’ dues.

“The AFP foundation has a longstanding commitment and an impressive record of success in supporting the profession’s strategic priorities,” said AFP Foundation Chair William M. Moran, FAHP, ACFRE. “We work closely with AFP to invest in creative solutions. Major gifts to the foundation have funded a long list of educational programs and products that are used today by AFP members and chapters worldwide to advance ethical and effective fundraising.”

Moran, who serves as the 22nd chair of the AFP foundation, is executive director of St. Vincent’s Foundation in Birmingham, Ala. He is a strong advocate for the work of the foundation, having actively contributed to both AFP and the AFP foundation for more than 20 years in leadership and fundraising roles at all levels.

Moran acknowledges the abundant energy and reservoir of talent and experience represented by his fellow board members. “It is a great honor and an incredible privilege to work with such a remarkable group of colleagues. This year, as AFP commemorates its 50th anniversary, our team will aggressively seek major gifts to support programs that will respond to the challenges facing fundraising professionals. Our ultimate goal is to invest in strategic initiatives and priorities that support philanthropy and build an increasingly vital fundraising profession for the future.”

The foundation’s success is attributable to the dedicated service of its officers and directors. Six new directors, who will serve three-year terms, joined the board in January 2010. They are Robert N. Croft, CFRE, of Crandall, Croft and Associates in Somersett, Ind.; Marshall H. Ginn, CFRE, managing director of Capital Development...
Strategies in Arlington, Va.; Susan Earl Hosbach, CFRE, executive director of the Minnie Pearl Cancer Foundation in Nashville, Tenn.; Patricia Moran, CFRE, vice president for institutional advancement at Cedar Crest College in Allentown, Pa.; Marc S. Saffren, CFRE, managing director of m3 Development in Marlboro, N.J.; and Christopher D. Watson, president of Changing Our World in New York, N.Y.

Throughout the year, members of the foundation’s strategic initiatives committee will seek major gifts to create new opportunities. One of the foundation’s top priorities for 2010 is funding for the AFP Ethics Education Curriculum and the AFP 50th anniversary strategic initiatives. Each of these initiatives has attracted major gifts from AFP individual members and chapters. Their gifts will promote ethical standards and practices across the nonprofit sector and commemorate AFP’s accomplishments over five decades.

“In addition to the AFP ethics curriculum and 50th anniversary strategic initiative, prospects and solicitors have been identified, and we have developed funding proposals for several other strategic priorities,” said Kevin Foyle, CFRE, associate vice president for development at Rice University in Houston and vice chair of fundraising for the AFP Foundation for Philanthropy. “Among these are...
funding for the AFP 2010 Think Tank on Regulation, Ethics and Philanthropy; replication of the highly successful Color of Money conference, held for the first time in 2009 in Philadelphia; the AFP 2010 Leadership Academy; and development of more AFP collegiate chapters. Major gifts are invaluable assets for the entire profession, today and tomorrow.”

Among its overarching strategic priorities in 2010, the AFP Foundation for Philanthropy–Canada, along with the Canadian Council, will continue to raise money for translating fundraising-related materials into French, including the new Fundamentals of Fundraising course. In addition, funding research related to fundraising specifically in Canada remains another strategic initiative priority this year. Fundraising research has been an important member benefit in Canada, and the foundation is exploring what should be next. Creating a Canadian context of the fundraising effectiveness research is also being explored.

The Canadian foundation is pleased to welcome its new board members in 2010. They include Nowshad Ali, CFRE, of On Purpose Leadership Inc. in Saskatoon, Saskatchewan; Roger Ali, CFRE, of Hamilton Health Sciences Foundation in Hamilton, Ontario; Laura Gatensby, CFRE, from Brampton, Ontario; and Edie Newton of the Newfoundland Symphony Orchestra & NSO Foundation in St. John’s, Newfoundland. All will be serving a two-year term.

“The Canadian foundation is moving forward quickly to ensure that not only are our strategic priorities being addressed, but also those of our U.S. counterpart. We are actively involved in a major-gift initiative that will fund educational opportunities, research, translations and mentoring. We have a strong and committed board and are looking forward to 2010, AFP’s 50th anniversary, being a banner year,” said Shauna Klein, M.A., chair of the AFP Foundation for Philanthropy–Canada.

“We are honored to partner with our colleagues and external organizations that support the foundation’s work,” Moran added, “and we want to acknowledge their generosity with our sincere appreciation.”

2010 AFP Foundation for Philanthropy Strategic Initiatives

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Fifteen New Members Inducted Into the Omega Circle

The Omega Circle welcomed 15 new members in October 2009 in Orlando, Fla. 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 the induction dinner held in conjunction with the AFP Leadership Academy and meetings of the AFP and AFP foundation boards. The evening acknowledged and celebrated the 2009 Omega Circle members’ generous investments in the future of the profession and allowed them to share their motivations and personal commitment.

One member of the Omega Circle Class of 2009, John Elliott Joslin, CFRE, senior consultant with Talisma in Charlotte, N.C., recalls that a “gentle push” at the right time prompted his gift. “2009 was a difficult year for me. My 89-year-old mother died in May and I found myself serving as executor of her estate,” he said. “After reading her will and consulting with my attorney, I began to think about what I wanted to leave and to whom. About this time, Mary Jean Gilbert, a member of the AFP foundation board and the planned giving committee, called me. She explained how I could become a member of the Omega Circle. She was extremely gracious and we had a very good and relaxed conversation. I made up my mind to make my planned gift. I needed only ‘a gentle push’—a sign if you will.

“Ever since I made my planned gift, I have felt good about how it will help others in our profession and hopefully make a difference in philanthropy in perpetuity. I am at peace and give thanks for being able to make the gift that I have made.”

Omega Circle Class of 2009

- Michael J. Baker, CFRE
  Marlboro, N.J.
- Ronald F. Barisano, CFRE
  Millville, N.J.
- Mark Climie-Elliott, CFRE
  Toronto, Ontario
- Yvette and Michael Delzotti, CFRE
  Houston, Texas
- Patrick J. Feeley, CFRE
- Gary L. Good, CFRE
  Irvine, Calif.
- Ann M. Hale, CFRE
  Anchorage, Alaska
- John Elliott Joslin, CFRE
  Charlotte, N.C.
- Tania Little, CFRE
  Toronto, Ontario
- Claudia A. Looney, FAHP
  Los Angeles, Calif.
- Paul McNair
  Victoria, British Columbia
- Luce Moreau, CFRE
  Montreal, Quebec
- Joshua R. Newton, CFRE
  Atlanta, Ga.
- Marc S. Saffren, CFRE
  Manorville, N.Y.
- Jan and Stanley Weinstein, ACFRE
  Albuquerque, N.M.
2009 Annual Fund Award Winners Announced

Each year, the AFP Foundation for Philanthropy and the AFP Foundation for Philanthropy–Canada recognize outstanding chapter performance in the annual fund. The AFP foundation has three award categories that are given to chapters that reach the highest level within each group of like-size chapters. The awards are the Every Member Campaign Award of Excellence, Highest Percent Member Participation and the Highest Chapter Treasury Gift. The AFP Foundation for Philanthropy–Canada also has three award categories: Highest Member Participation, Highest EMC Dollars Per Decision (through the calling program) and the Award of Excellence, which is based on highest per capita giving.

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 monetary gift to use in chapter activities and a certificate.

“The Canadian AFP chapters are to be congratulated on their wonderful work in 2009 in making the Every Member Campaign a success,” said Shauna Klein, M.A., chair of the AFP Foundation for Philanthropy–Canada. “Our goal in 2010 is to align our awards with the U.S. foundation in order to continue with our efforts of collaboration.”

“Congratulations to the chapters whose fundraising performance is an inspiration to us all,” said Curtis C. Deane, CFRE, CAE, president of the AFP Foundation for Philanthropy. “The foundation appreciates the volunteers’ hard work and valuable contributions throughout the year.”

### 2009 Annual Fund Awards

#### 2009 Every Member Campaign Award of Excellence

- **15–50 Members:** AFP AZ, Northern Chapter ($3,270)
- **51–100 Members:** AFP WI, Upper Mississippi Valley Chapter ($4,075)
- **101–250 Members:** AFP NY, Genesee Valley Chapter ($10,345)
- **251–400 Members:** AFP GA, Greater Atlanta Chapter ($18,800)
- **401+ Members:** AFP DC, Washington DC Metro Area Chapter ($27,463.50)

#### 2009 Highest Percent Member Participation

- **15–50 Members:** AFP PA, Pocono Mountains Chapter (100 percent)
- **51–100 Members:** AFP WI, Upper Mississippi Valley Chapter (70.67 percent)
- **101–250 Members:** AFP OH, North Central Chapter (52.29 percent)
- **251–400 Members:** AFP TX, San Antonio Chapter (36.92 percent)
- **401+ Members:** AFP NJ, New Jersey Chapter (30.82 percent)

#### 2009 Highest Chapter Treasury Gift

- **15–50 Members:** AFP CA, Greater San Fernando Valley Chapter ($500)
- **51–100 Members:** AFP OH, Northwest Chapter ($1,265)
- **101–250 Members:** AFP FL, Treasure Coast Chapter ($500)
- **251–400 Members:** AFP PA, Western Chapter ($2,700)
- **401+ Members:** AFP NJ, New Jersey Chapter ($3,000)

### AFP Foundation for Philanthropy–Canada 2009 Annual Fund Awards

- **Highest Member Participation**
  - AFP MB, Manitoba Chapter
- **Highest EMC Dollars Per Decision**
  - AFP ON, Greater Toronto Chapter
- **Award of Excellence**
  - AFP MB, Manitoba Chapter
Foundations Award 2009 Chapter Partnership Grants

In 2009, 122 chapters qualified to receive a 2009 Every Member Campaign (EMC) Chapter Partnership Grant from the AFP Foundation for Philanthropy, and eight Canadian chapters qualified to receive a 2009 EMC Chapter Partnership Grant from the AFP Foundation for Philanthropy–Canada. The EMC Chapter Partnership Grant program is available to AFP chapters that reach or exceed their EMC goal. The partnership grants represent 25 percent of the total funds received through gifts and pledge payments from each chapter.

Chapters use the partnership grant to help support their local activities, such as educational seminars, scholarships and National Philanthropy Day® events. In order to receive the partnership grant, chapters must submit a grant proposal on how they will use the funds before they are disbursed.

“The Every Member Campaign is a partnership effort with the AFP chapters,” said Curtis C. Deane, CFRE, CAE, president of the foundation. “I am pleased to award these chapters for their outstanding work on behalf of the foundation during 2009.”

“The AFP Foundation for Philanthropy–Canada enjoys the partnership that it shares with all the AFP Canadian chapters in coordinating the Every Member Campaign,” added Shauna Klein, M.A., chair of the AFP Foundation for Philanthropy–Canada. “The grants back to the chapters allow the fundraising profession to continue its growth through education and awareness in the community.”

2009 EMC Chapter Partnership Grant Recipients

- AFP AB, Calgary & Area Chapter
- AFP AK, Alaska Chapter
- AFP AL, Alabama Chapter
- AFP AL, Central Chapter
- AFP AL, Gulf Coast Chapter
- AFP AR, Arkansas Chapter
- AFP AR, Northwest Chapter
- AFP AZ, Northern Chapter
- AFP AZ, Southern Chapter
- AFP CA, Capital Chapter
- AFP CA, Golden Gate Chapter
- AFP CA, Greater Los Angeles Chapter
- AFP CA, Greater San Fernando Valley 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 CO, Southern Chapter
- AFP CT, Connecticut 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, Indian River Chapter
- AFP FL, Nature Coast Chapter
- AFP FL, Space Coast Chapter
- AFL FL, Suncoast Chapter
- AFL FL, Treasure Coast Chapter
- AFP GA, Coastal Chapter
- AFP GA, Greater Atlanta Chapter
- AFP HI, Aloha Chapter
- AFP IA, Central Chapter
- AFP IA, Eastern Chapter
- AFP IA, Greater Tri-State Chapter
- AFP ID, Idaho Chapter
- AFP IL, Capital Area Chapter
- AFP IL, Central Chapter
- AFP IL, Chicago Chapter
- AFP IL, East Central Chapter
- AFP IL, Quad Cities Chapter
- AFP IL, Rockford Area Chapter
- AFP IN, Indiana Chapter
- AFP IN, Michiana Chapter
- AFP IN, Northeast Chapter
- AFP IN, Northwest Chapter
- AFP KS, Greater Wichita Chapter
- AFP KS, Topeka Chapter on Philanthropy
- AFP KY, Bluegrass Chapter
- AFP LA, Baton Rouge Chapter
- AFP LA, Greater New Orleans Chapter
- AFP LA, Greater Northshore Chapter
- AFP MA, Central Massachusetts Chapter
- AFP MA, Western Chapter
- AFP MB, Manitoba Chapter
- AFP MD, Maryland Chapter
- AFP MD, Western Chapter
- AFP MI, Mid-Michigan Chapter
- AFP MN, Minnesota Chapter
- AFP MN, Southern Minnesota Chapter
- AFP MO, Mid-America Chapter
Thank You and Merci Beaucoup!

What would an effective telefundraising program be without dedicated people conducting professional and personalized conversations with donors? The AFP Foundation for Philanthropy is grateful for the generous support that Cedar Rapids, Iowa-based RuffaloCODY provided to ensure a successful 2009 Every Member Campaign (EMC) Calling Program. RuffaloCODY contacted more than 8,900 AFP members and raised more than $190,000 for the 2009 campaign. The foundation is excited to announce that RuffaloCODY will again provide pro bono services to solicit gifts to the 2010 EMC and looks forward to another successful calling campaign.

The AFP Foundation for Philanthropy–Canada thanks its partners Stratcom (Strategic Communications Inc.), with offices in Toronto and Vancouver, for providing pro bono telemarketing services, and Toronto-based A.K.A. New Media Inc. for providing online giving capabilities to the foundation.
The AFP Foundation for Philanthropy and the AFP Foundation for Philanthropy–Canada would like to thank the many donors who contributed to the foundations’ success in 2009. Each donor helps the foundations to advance ethical and effective fundraising throughout the world. ♦

Foundation Donors Make a Difference in 2009

Foundation Donors Who Gave $250 or More in 2009

**Benefactor**
($250,000–$499,999)
Marjorie K. and Stephen M. Levy, CFRE*

**Distinguished Patron**
($100,000–$249,999)
Association of Fundraising Professionals**
RuffaloCODY**

**Meritorious Patron**
($50,000–$99,999)
Estate of Leslie W. Brown, CFRE
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*
Paschal Murray*
Strategic Communications Inc.*

**Partner**
($10,000–$24,999)
Claude H. Grizzard Sr.
Susan F. Rice, Ed.D., ACfRE
The Philadelphia Foundation

**Patron**
($5,000–$9,999)
Advantage Fundraising Consulting**
Joan V. Black, CFRE
Edyth Bush Charitable Foundation
Gail L. Freeman
Robbe A. Healey, MBA, NHA, ACfRE
Ketchum Inc.
Paulette V. Maehara, CAE, CFRE

**Founders’ Club**
($3,500–$4,999)
Kristina J. Carlson, CFRE
Suzanne Hittman
Andrea McManus, CFRE
Estate of Milton J. Murray, FAHP
Donald G. Rizzo, CFRE

**Stewards’ Club**
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Anthony R. Alonso
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Pam Carroll
Barbara L. Cicone, CFRE
Gary M. Cole, Ed.D., CFRE
Robert J. Crandall, CFRE
Curtis C. Deane, CFRE, CAE
Alice L. Ferris, CFRE
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Gary L. Good, CFRE
Virginia L. Johnson
John Kelleher, CFRE
Marcia M. Kerz, CFRE
Audrey P. Kintzi, ACfRE
Martha M. Kirkland
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Linda Lysakowski, ACfRE
William M. Moran, FAHP, ACfRE
Colette M. Murray, J.D., CFRE
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Skystone Ryan
Philip G. Schumacher, ACfRE
Scott C. Staub, ACfRE
The H B E Foundation

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James H. Allen, ACfRE
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Terry B. Axelrod
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Brian J. Bonde, ACfRE
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Felicia H. Brant
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Juan Calixto, CFRE
Melinda Conway
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Sean D. Carter, CFRE
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Mark Climpie-Elliott, CFRE
Vincent F. Connelly
Matthew S. Cottle, CFRE
Shirlene Courcis, CFRE
Helen Clark Dannely
Bernadine Douglas, CFRE
D. C. Dreger, ACfRE
Paul A. Dunne, CFRE
Lona M. Farr, Ph.D., ACfRE
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(Continued from page 9)

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Stuart Reid
Sandra Renner, CFRE
Mark A. Roberts, CFRE
Rosebud by Nancy Clark
J. Patrick Ryan
Michelle Sherburn, ACC, CEC, AELC
Joe Skvara, CFRE
Peggy A. Smith, CSPG, CFRE
Charles R. Stephens
Carol A. Stevie
Jan Swauger
Lise D. Twiford
Jane Walstrom, CFRE
David E. Wiercinski, CFRE

Sterling Medalist

($250–$499)

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Christina Adams
Guy Adams
Doug Alexander
Laura Alexander
April D. Anthony
Sally A. Archer, CFRE
Jeannette J. Archer-Simons
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Sue Bailey
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Dr. Roland C. Dubay, CFRE

Eileen Hayden, CFRE
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Brenda Michael-Haggard, CFRE
AFP Canada Office Moves to Toronto

The AFP Canada office move from Ottawa to Toronto was completed on Jan. 14, 2010. AFP entered into a partnership with the Greater Toronto Chapter, which will provide member and donor support to AFP. The Toronto chapter already had a staff of three and recently hired Brigid O’Connor as a fourth staff person whose work will be primarily on Canadian membership queries and the AFP Foundation for Philanthropy–Canada. Brigid reports to Cynthia Quigley, the office manager who is a long-time staff person for the chapter.

The new office location and contact information follows.

**AFP Canada Office**

260 King Street East, Suite 412
Toronto, Ontario M5A 4L5
Canada

Tel.  416-941-9144
Fax:  416-941-9013

Email (membership):  cdnmembership@afpnet.org
Email (foundation):  cdnfoundation@afpnet.org
Website:  www.afpnet.org/afp.Foundation_for_Philanthropy/foundation.canada
Anniversary Funding Grows

AFP’s 50th anniversary is in full swing, and the 50th Anniversary Fundraising Campaign is raising the funds needed to allow all the anniversary plans to be fully realized. More than $75,000 has already been raised from AFP chapters, individuals, and organizations.

The AFP Foundation for Philanthropy is conducting the campaign, which is designed to allow donors to direct gifts to one of three distinct options.

1. The **50th Anniversary Strategic Initiative**, which encompasses the special programs and projects developed by AFP’s 50th anniversary task force, offers donors the opportunity for their funds to be used exclusively in support of the anniversary’s many varied and unique activities.

2. The **Ethics Curriculum Strategic Initiative** will fund the creation of a formal standardized ethics curriculum. Ethics was the cornerstone of AFP’s creation and continues to be at the heart of everything AFP does.

3. The **Fund For The Future**, a legacy and endowment-type giving option, is for donors who want their gifts to have a more permanent aspect.

“The 50th Anniversary Fundraising Campaign offers all AFP members a unique opportunity to say thank you to our fundraising profession and to help keep AFP strong as it moves forward into a new era of promoting ethical and effective fundraising,” said Gary L. Good, CFRE, vice president of development for the Pacific Symphony in Irvine, Calif., and chair of the campaign.

“Chapters are at the heart of AFP, and our goal is to have 100 percent of all AFP chapters make a gift to the anniversary campaign and thereby be recognized as a part of the AFP Chapter 50th Anniversary Circle,” added Grant E. Martin, CFRE, vice president for advancement for the Tampa Bay History Center in Tampa Bay, Fla., and chair of the AFP Chapter 50th Anniversary Circle Campaign. More than 50 AFP chapters have already made a gift to the campaign.

For information on the campaign and how to make a gift, please contact the AFP Foundation at 800-666-3863, ext. 448. ◆

AFP Skystone Ryan Research Prize Awarded to **Global Compassion**

**Global Compassion: Private Voluntary Organizations and U.S. Foreign Policy Since 1939** by Rachel M. McCleary (Oxford University Press, 2009) has received the AFP 2010 Skystone Ryan Prize for Research on Fundraising and Philanthropy. McCleary is a senior research fellow, Taubman Center, Harvard Kennedy School of Government, Harvard University; a research fellow of the Hoover Institution at Stanford University; and a visiting scholar at the American Enterprise Institute.

“**Global Compassion** is a well-researched and well-explained treatise on funding of international development, a sub-sector that is increasingly raising funds from individuals and other philanthropic and private sources in addition to being supported by the U.S. government,” said the research prize jury of the AFP Research Council in a statement about the honoree. “Because AFP is increasingly branching out in becoming an international association of global fundraising, this book was selected because it not only is documented and written extraordinarily well, but it also has relevance to a growing segment of the AFP membership. An excellent volume that addresses the pros and cons, the issues, the possibilities and the particulars of fundraising for international NGOs has long been due, especially one that provides perspectives on the state of affairs as well as future possibilities. In keeping with AFP’s research prize qualifications and criteria, McCleary’s book is outstanding.”

The Skystone Ryan Prize is funded through the AFP Foundation for Philanthropy by Skystone Ryan. ◆