



## ASSOCIATION OF FUNDRAISING PROFESSIONALS COLLEGIATE CHAPTER TOOLKIT

### PURPOSE

The purpose of the Collegiate Chapter Toolkit is to clearly **define** the roles and responsibilities of the Collegiate Chapter Faculty and Professional Advisors; **guide** the collegiate chapter in choosing the best people to serve as Advisors and Chapter leaders; **provide** ideas from other collegiate chapters that have proven to work for establishing your chapter as a robust organization within your college or university; and **suggest** other resources that will prove helpful as you build and sustain a successful professional development organization. Although some collegiate chapters exist as a “student club” on campus, ultimately, the AFP Collegiate Chapters are designed to be prestigious pre-professional organizations and should be approached and managed as such. Your chapter will remain active and reach its goals and objectives by utilizing the recommendations found in this toolkit as well as the ideas and programs from your fellow chapters. In addition, the professional affiliations your members make through their engagement in the AFP Collegiate Chapter will remain and will help as you move toward a career in nonprofit fundraising and/or management.

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## **1. Now That You are an AFP Collegiate Chapter**

Congratulations on becoming an AFP Collegiate Chapter! In many ways, you join many other student-led organizations and clubs on your campus, but in other ways, your AFP Collegiate Chapter is unique. Your chapter is part of something much bigger - a world-wide professional organization that not only is a part of a global network of fundraising professionals across the globe, but also a catalyst for an amazing career.

As student members, you are not in this alone. Your chapter is supported by your on-campus faculty advisor and your local AFP chapter Professional Advisor, as well as by the staff and outstanding resources of the Association of Fundraising Professionals.

### **1.1 Faculty and Professional Chapter Advisors**

Faculty and Professional Advisors are volunteers who have agreed to help support your collegiate chapter. They are not voting members of your chapter, but are there to provide guidance, advice, access to campus and AFP resources, professional training and introductions to fundraising professionals. With both a campus advisor and a professional advisor from your community, your AFP Collegiate Chapter will have a wealth of experience, networks and resources at your disposal.

### **1.2 What you Should Expect from Your Professional Advisor**

Your Professional Chapter Advisor should:

- Be present at a majority of your collegiate chapter meetings, so include them in your meeting calendar planning.
- Be your official link to the local AFP chapter-and should provide you with the calendar of professional chapter meetings, information on training and service opportunities sponsored by the chapter, including National Philanthropy Day.
- Assist your chapter in accessing funding for your chapter from the local chapter, such as scholarships for training and conferences (including the AFP International Conference, ICON), discounted student rates for professional chapter meetings and meals.
- Be available to meet with members of the Collegiate Chapter following professional chapter meetings to respond to questions, debrief, network and to assist the participating students to assess what they have learned.
- Assist in identifying, inviting and engaging Collegiate Chapter members on the Professional chapter board of directors, committees, such as National Philanthropy Day (NPD) and as panelists, student speakers and meeting facilitators.
- Help with engaging professional chapter members as mentors for collegians and promote opportunities for "job shadowing" and other professional development opportunities (see Section 4.6).

- Provide you with information on the International Conference on Fundraising (ICON), and ascertain that your collegiate chapter is aware of collegiate registration rates and deadlines, specific collegiate workshops and activities at ICON and assist with registration and transportation planning in collaboration with professional chapter ICON attendees.
- Help you brainstorm, select and perform your annual philanthropic project (see Section 4.7).
- Meet annually with your Faculty Advisor to ensure that your chapter's programs are meeting all of the requirements of your college or university and academic program, if applicable.

### **1.3 What you Should Expect from Your Faculty Advisor**

Your Faculty Advisor should:

- Help facilitate your chapter's meeting of any and all college or university requirements.
- Be the official liaison between your chapter and the college or university.
- In the case of an academic program for Non-profit studies, ensure that the activities of the chapter meet any academic requirements for student members.
- Assist the Professional Chapter Advisor wherever possible.
- Meet annually with the Professional Chapter Advisor to ensure that there is complete understanding of the role of an AFP Collegiate Chapter.

### **1.4 Planning for an Exciting Year**

Your AFP Collegiate Chapter should offer experiences to its members that not only will be fun and give you a chance to meet others with similar interests, but will also be invaluable to a future career in the nonprofit sector, provide education that is both interesting and useful, offer opportunities to network with professionals in the field, prepare you for your job search following graduation, give you hands-on experiences in fundraising. Here are some suggestions for ensuring a great year for your chapter:

- Together with your campus calendar of events and activities AND the local AFP chapter's calendar, have your collegiate chapter board, meet with your Faculty and Professional Chapter Advisor to plan all activities for the academic year
- Ensure that you have a good mix of networking, professional training, social and personal development activities.
- Look for ways that your Collegiate Chapter can participate in campus fundraising and/or development activities, such as phone-a-thons, races, auctions, dinners and annual campaign events. These will help members learn both principles and fundraising techniques while building professional relationships.
- Communicate with your Professional Chapter Advisor on ways to engage your collegiate chapter and your broader college campus in activities for National

Philanthropy Day, such as nominating a campus fundraising volunteer, collegiate chapter member, or campus organization for one of the NPD recognitions.

- Plan to register and attend the annual AFP International Conference on Fundraising and consider presenting a professional workshop from a collegiate perspective at an upcoming ICON.

## **2. Everything You Wanted to Know About Chapter Operations**

Operating your collegiate chapter effectively and efficiently is important to chapter success. One of the best ways to ensure an effective and exciting is to make sure that you plan ahead, make sure that you have leadership in place for the following year, fill out and submit your Chapter Accord documents on time and that you take advantage of all of the resources AFP has to offer.

### **2.1. Succession Planning & Leadership Transition**

- Officer elections are to take place in the spring. Current officers need to start identifying the new leadership in the fall, and begin to train them starting in January.
- Make sure that the expectations are set up-front when a student is elected to a position.
- Make sure you have written job descriptions for each officer and committee chair, what the term of office is and who each position reports to. (**Appendix 6.1**).
- In order to ensure that you always have all of your chapter's president and past documentation and contingency plans, it is recommended that your chapter purchase an external hard-drive to secure all chapter files.
- Make sure that the incoming officer or chair understands completely their position's roles and responsibilities.
- Have each officer create transition binders with all of the information about that position included.
- Maintain good records for your successor.

### **2.2. The Collegiate Accord Process**

All chapters, both professional and collegiate must comply with the annual AFP Board-directed Accord process, commonly referred to as the Chapter Accord. This is a report that provides the required documentation necessary for AFP to maintain its IRS group exemption, as well as to communicate to the board the contributions chapters are making in carrying out the AFP vision and mission. This process ensures that all collegiate chapters remain active and all leadership positions are filed.

The deadline for receipt of the Collegiate Chapter Accord documents is April 30. AFP staff will send out email reminders about the deadline to all chapter presidents and Faculty Advisors. Required accord documents are located at: <http://www.afpnet.org/Audiences/ChapterNewsDetail.cfm?ItemNumber=2575>.

### **2.3. Resources from your AFP Professional Chapter**

Your local professional chapter is your go-to resource for many resources for your collegiate chapter. Your chapter leaders are encouraged to develop a close working relationship with your Professional Chapter Advisor, who will be your liaison to the board of the professional chapter.

- Involve your Professional Chapter Advisor in as many of your chapter activities as possible, so that she/he may be able to suggest ways the professional chapter can be of support, and will be able to seek that support on your behalf.
- The professional chapter will be a great source for many of your programming ideas and presenters. See Sections 4.4 and 4.6.
- The professional chapter may be a source of funding for your chapter for programming, scholarships and travel to conferences. It is recommended that if the professional chapter offers financial support to the collegiate chapter, that a letter of agreement, outlining the expectations of the collegiate chapter be signed by both the professional chapter president and the collegiate chapter president. (Sample letter: **Appendix 6.2**).

### **2.4 Resources from AFP IHQ**

AFP offers many resources for collegiate members and chapters. Chapter leaders are encouraged to talk with their Faculty Advisor and Professional Chapter Advisor for recommendations of resources that will of specific help to the chapter leadership.

- A quarterly collegiate chapter newsletter, “Foundations in Fundraising” includes general information, new tools, what’s going on at AFP. a feature on a collegiate chapter and copies of all forms with deadlines. (Sample Content: **Appendix 6.3**).
- Collegiate leadership calls are held at least once each semester so that chapter leaders can be on a conference call together to learn about what each chapter is doing, share successes and seek solutions to challenges.
- The AFP website ([www.afpnet.org](http://www.afpnet.org)) offers a wealth of information for collegiate members on almost every topic about fundraising and leadership.
- There is a complete list of AFP resources on Page 12 of this toolkit.
- The AFP Collegiate Chapter Linked-In Group offers members an opportunity to connect with student members across the U. S. (<https://www.linkedin.com/grps/Collegiate-Chapters-Hosted-AFP-2449311/about?>)

## **2.5. Your Personalized Chapter Handbook**

- Use the handbook created by the AFP University of North Florida Collegiate Chapter as a model to copy and edit for your chapter. ( **Appendix 6.4**).

## **2.6. Strategic Planning**

Strategic planning is looking at where you want your chapter to be in a few years' time. It is determining what the chapter should look like, what it will be accomplishing and its place on campus in the future. It is important to not only create an operational plan for the current year, but also to have a strategic plan in place with longer term goals for the chapter. A sample plan from the AFP Collegiate Chapter at UNF Chapter is included. (**Appendix 6.5**).

## **3. Opportunities for Collegiate Members**

There are many opportunities that collegiate members can take advantage to increase your knowledge of fundraising, give you practical experience, help you learn about professional practices in the field, develop contacts and mentors, meet other collegiate members around the country and even earn the Collegiate Certificate in Fundraising.

### **3.1. International Conference on Fundraising**

- The AFP International Fundraising Conference is held each spring and brings more than 4,000 fundraising professionals together to discuss, teach and learn about new development issues and techniques. It offers more than 150 educational sessions designed to serve the needs of participants from entry level fundraisers to highly experienced professionals. The exhibit Hall features more than 300 exhibitors.
- Each collegiate chapter is offered one free conference registration, and in recent years, there have been travel grants available as well.
- Collegiate students are always offered deeply discounted registration fees.
- A special meeting of all collegiate attendees is held at every conference, as well as several sessions designed for young professionals.
- Collegiate members are invited to join young professionals at all of their social events.

### **3.2. Collegiate Leadership Conference**

- The inaugural Collegiate Leadership Conference took place in May of 2015, through a special grant from the Edyth Bush Charitable Foundation.
- The Leadership Conference goal is to encourage students continuing commitment to a career in the nonprofit sector as the next generation of leaders and professional fundraisers who will build the capacity of philanthropy.

- AFP plans to continue to offer this conference on an annual or biannual basis.

### **3.3. Collegiate Certificate in Fundraising**

- Members of AFP collegiate chapters can further their knowledge of the nonprofit sector by working toward the AFP Collegiate Certificate of Fundraising. (<http://www.afpnet.org//Audiences/ChapterNewsDetail.cfm?ItemNumber=2575>)
- Completion of the certificate will demonstrate a comprehensive understanding of fundraising and a commitment to ethical and effective fundraising practices.
- Certificate requires earning 100 points with minimum requirements in the areas of education, professional practice, ethics and chapter involvement, as well as a written statement and meeting with the faculty advisor.

### **3.4. Volunteering at professional chapter events**

- National Philanthropy Day is a special day set aside on the 15th of November (although celebrated on various days in November by most chapters), to recognize the great contributions of philanthropy and those who are active in the philanthropic community, to enrich our world. As a major community event in most cities, working at National Philanthropy Day (NPD) is a rewarding and inspiring opportunity for collegiate members.
- Local Educational Conferences. Many chapters host an annual educational conference with outstanding presenters and many sessions. Collegiate member volunteers can often take advantage of the education offered at no cost by volunteering to help with local conferences.

### **3.5. AFP Webinars**

- AFP offers its chapters and members a comprehensive series of webinars on every conceivable fundraising and nonprofit leadership topic. Most professional chapters offer some or all of these to their members, and collegiate members may attend these webinars at local locations, or may arrange to present one or more at their college or university. Video recordings of webinars are also available. (<http://www.afpnet.org/Professional/ProgramDetail.cfm?itemnumber=4030&navItemNumber=552>)

## **4. Ideas That Work from Other Collegiate Chapters**

The AFP Collegiate Chapters have come up with many creative ideas for approaching many of your ongoing activities and programs. Below are suggestions from other chapters that you may want to consider.

#### **4.1. Acquiring New Members**

- Host information tables at the club/organization fair or club fest on campus or during other appropriate events.
- Arm all officers with an “elevator speech” about what the AFP collegiate chapter is about, or business cards to hand out when they meet interested people.
- Set up a recruitment table at the Student Union during the first month of classes.
- Host a National Philanthropy Day table on campus to raise awareness,
- Create a chapter website to refer people to.
- Send out an e-newsletter with upcoming events, member news, information from the professional chapter and relevant nonprofit industry news.
- Promote the chapter on the university radio or television station and the student newspaper.
- Host a speaker series open to all on campus to find interested students.
- Ask to visit appropriate classes (business, fundraising, nonprofit management, finance) to make a brief presentation.
- Find out if it would be possible to include a letter of invitation in the admissions or transfer packets sent to new students.
- Encourage the appropriate academic program faculty to use the AFP chapter as a part of its recruiting efforts.
- Consider co-membership with another similar on-campus organization, such that if a student joins one, they are automatically a member of the other.
- Build cohorts of members who join at the same time to create and strengthen relationships.
- Have a Refer-a-Friend program to influence members’ peers to join the chapter. Example: Set a goal for each officer or member to refer at least 2-4 members to the Chapter each academic year, with awards given to the person with the top number of referrals.

#### **4.2. Member Benefits to Talk About**

- The focus of membership is leadership, professional development, networking and learning.
- Being a member will help build your resume.
- You will have the opportunity to earn the Certificate in Fundraising that will help you get a job when you graduate.
- Having knowledge of nonprofit organizations can have a benefit across many industries.
- Most positions within a nonprofit require some knowledge of fundraising.
- You will have opportunities to network with professionals in the field.
- You will be able to attend fundraising workshops and other learning opportunities.



- You will have access to internships and job shadowing opportunities.
- You will be able to attend professional AFP program meetings.
- You will gain board service experience.
- You will gain hands-on fundraising experience.
- You will meet new people and make new friends.

#### **4.3. Working with Your University or College**

- Use faculty and advisors in relevant departments to help promote membership because they will know the best candidates or those who might have the most interest. Relevant departments include:
  - Political Science
  - Public Administration
  - Non-profit Management
  - Public Health
  - Business
  - Public Relations/Marketing/Graphic Design
  - Communications
  - English
  - Social Work
  - Psychology
  - Fine Arts/Arts & Museum Management
  - Sociology
  - International and Public Affairs
- Ask faculty in relevant departments or classes if you or an officer can make a brief presentation during class, or can distribute information about membership.
- Schedule a time to meet with relevant university/college leadership or offices so that they understand what AFP stands for, what it does and how it has a positive impact on the university/college.
- Ask your faculty advisor or professional chapter advisor to facilitate relationship-building with local nonprofits willing to offer internships, to shadow a professional or to allow collegiate chapter members to sit in on their board meetings.
- Talk with your institutions's development staff to see if they are willing to help facilitate educational programming.

#### **4.4. Working With your Local AFP Chapter**

- Ask your local AFP Chapter to offer special low-level rates for collegiate members to attend professional luncheons and educational programs.
- Ask if a student member can sit on the board of the professional chapter.

- Maintain a close relationship with the Professional Chapter Advisor, and the professional chapter president so that collegiate chapter needs will be regularly communicated to the professional chapter board.
- Use the professional chapter board as a resource for identifying experts to facilitate workshops, small conferences, educational programs, or forums open to your university's entire student body. Events like this will help in recruiting additional members who will see the value in membership.
- Talk with your Professional Chapter Advisor and professional chapter leadership about available scholarships, including for membership, local meetings or conferences or the International Conference.
- Ask if your members can participate in National Philanthropy Day (NPD) by helping with set-up and registration and attend the event.
- Suggest to the professional chapter that they provide one-on-one mentors for members.
- Ask your sponsorship professional chapter to provide mock interviews for graduating seniors as well as help with resumes.
- Work with the local professional chapter to seek out internships for members.
- Ask your local chapter to host a speed-mentoring program for students wanting to learn more about nonprofit organizations.
- Ask your local chapter for a line item in their budget for support for the collegiate chapter.

#### **4.5. Working With Other Campus Organizations**

- Collaborate with other like-minded organizations to host recruitment tables or special events.
- Speak at Pan-Hellenic Council meetings - most sororities and fraternities must be engaged in some sort of philanthropic activity, and they may need your help.
- Speak at University Senate meetings.
- Piggyback on the university or college's annual fundraising events or student philanthropy week.
- Open a selection of your workshops and programming to other organizations or the entire student body to recruit new members.
- Make sure that the Student Affairs and Student Life offices knows about the collegiate chapter and its purpose. They may be very helpful in sending potential members to you.
- Ensure that chapter events are listed on the college/university calendar.

#### **4.6 Programming**

- Set a goal of being a Collegiate Ten-Star chapter and develop programs to meet that goal. (<http://www.afpnet.org/Audiences/ChapterNewsDetail.cfm?ItemNumber=24114>)
- Invite a panel of speakers on a specific topic and invite non-member students to attend.
- Work with the professional chapter and the institution's development office to provide speakers.
- Ask the professional chapter to organize a resume review and a mock interview session.
- Invite development professionals from local nonprofit organizations to speak about their organizations and their fundraising efforts.
- If you have graduates of the student chapter who are living and working in the community, invite them to serve as mentors to the chapter, or as a speaker to talk about how their experience helped them professionally.
- Consider working with the professional chapter to host a job shadowing day.
- Arrange with the professional chapter for members to attend some monthly chapter presentations.
- Suggest to the professional chapter board that each offer "Coffee with an AFP Board Member".
- Reach out to local high schools using the AFP Careers in Fundraising Toolkit to talk about fundraising as a career option to think about before going to college.
- Create a "Champions in Philanthropy Award" for National Philanthropy Day (NPD) on campus, where students can nominate student groups to be recognized for their philanthropy work.

#### **4.7 Philanthropy Projects**

- Join a national campus philanthropy, such as the competitive water balloon fights that raise money for the Cure Cancer Foundation, Relay for Life in support of St. Jude's, the Polar Plunge for Special Olympics, Read for Life or a partnership with an Autism Speaks chapter.
- Ask for RFPs from other student organizations and/or greek organizations wanting to raise money or from small local nonprofits for consulting support from AFP collegiate chapter members.
- Collaborate with a local nonprofit, such as a food pantry, a children's service organization or other by providing volunteer support for their programs or fundraising event.
- Consider managing a direct mail campaign to ask for support for scholarships.
- Create a fundraising page on your chapter website that outlines your case for support and makes it possible for others to contribute.

- Approach a local organization, such as the community foundation or Junior League to collaborate with the collegiate chapter and professional chapter on a series about local philanthropy.
- Volunteer to work in the university or college's development office.

## 5. Resources

Following are a series of print/online resources to help you organize, execute and support the management, operations and activities of your collegiate chapter. And do not hesitate to reach out to our AFP advisors listed below with questions!

### 5.1 Online Resources

#### **Association of Fundraising Professionals** ([www.afpnet.org](http://www.afpnet.org))

This may well be your first (and only) online stop for resources for your collegiate chapter. The AFP Resource Center, available to members, offers a broad assortment of professional development information, readings and materials.

#### **Association Forum** (<http://www.associationforum.org/Resources>)

Check out their link to many free online resources relating to chapter functions ranging from management to membership.

#### **Association Metrics** (<http://www.associationmetrics.com/free-resources>)

This link will take you to several downloadable white-papers on topics related to member recruitment, retention and engagement.

#### **Roberts' Rules of Order** (<http://www.dvc.edu/student-services/student-life/pdfs/Roberts-rules-SDSU.pdf>)

This link downloads a very nice RRO "cheat sheet" to help you maintain proper parliamentary procedures during meetings. A procedural "life-saver"!

### 5.2 Books and Literature

*Membership Essentials: Recruitment, Retention, Roles, Responsibilities, and Resources*, by ASAE & The Center Membership Section Council (Author), Sheri Jacobs (Editor)

*The Art of Membership: How to Attract, Retain and Cement Member Loyalty*, by Sheri Jacobs

*199 Ideas: Membership Recruitment and Retention* by [ASAE & The Center's Membership Section Council](#) (Author)

*The Volunteer Management Handbook: Leadership Strategies for Success*, by Tracy Connors

*Into the Heart of Meetings: Basic Principles of Meeting Design*, by Eric de Groot and Mike van der Vijver

*Organizing Special Events and Conferences: A Practical Guide for Busy Volunteers and Staff*, by [Darcy Champion Devney](#)

### **5.3 AFP Advisors and Support Services**

**Taryn Gold**, Director Chapter Administration: [tgold@afpnet.org](mailto:tgold@afpnet.org), 800-666-3863x452

**Pat Bjorhovde**, Coordinator Collegiate Chapter Program: [pat@bjorhovde.com](mailto:pat@bjorhovde.com), 520-299-4315

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### 6.1 Sample Collegiate Chapter Leader Job Descriptions

#### **President**

The President shall be the chief elected officer of the chapter. He/she shall preside at all meetings of the chapter and shall be an executive officer of all committees.

As the chapter's chief elected officer, the President shall be responsible for all chapter business. He/she shall:

- Appoint chapter officers and standing and temporary chairs. If there are two people vying for the same position, the **Advisor will pick** the best qualified or there will be a vote.
- Call special meetings as necessary (monthly or bi-monthly)
- Conduct the business of the chapter in consultation with the advisors
- Have a general knowledge of and responsibility for the supervision of Chapter business
- Prepare the agenda with other officers for all regular meetings and the Annual Meeting
- Act as spokesperson for the collegiate chapter; relay elevator speech
- Communicate with AFP Board of Directors, YIP Chair and Nonprofit Center of Jacksonville
- Complete accord materials before April 15 deadline to AFP IHQ

#### **Vice President**

- Act as President in his/her absence or if the President is not able to fulfill his/her duties
- Acquaint himself/herself with all the duties of the President and other officers, duties of all committees, chapter bylaws, and operating procedures
- Perform duties as assigned by the President

#### **Secretary**

- Prepare and distribute accurate minutes of all meetings of the chapter to all members
- Maintain chapter files of correspondence and program materials. Provide copies of the latest versions of these documents to all officers
- Prepare, with President/Vice President, member meeting/conference call agendas

- Other duties as assigned by the President

### **Treasurer**

The Treasurer shall be the fiscal officer for the chapter and is responsible for all funds, as outlined in the Chapter Bylaws.

- Maintain all financial records, collect debts, make payments as authorized with YIP Chair
- Provide the President with financial information needed from chapter records for the annual report
- Assist in preparation of the annual budget and monitor chapter expenditures
- Meet with President/Advisor/YIP Chair for budget review on a yearly basis
- Work with President/Advisor to prepare operating budget proposal to AFP Board each November in preparation for December board retreat

### **Membership/Recruitment VP**

- Report to the Chapter President at regular intervals
- Prepare and execute a membership recruitment/retention plan
- Promote cultural diversity in membership
- Send out Welcome messages to all new members
- Act as liaison between the Collegiate Chapter President and Professional Chapter on membership matters
- Develop a program to welcome new members and encourage their participation in chapter activities
- Create appropriate certificates/awards/recognition for members
- Collaborate with IHQ to receive appropriate recruiting materials each term

### **Social Events/Corporate Sponsor VP**

- Assist the President and Vice President in planning and organizing events, contacting potential sponsors, attending conferences and retreats, building relationships with current corporate sponsors, and building intercollegiate relations
- Follow Program Timeline
- Responsible for increasing donor renewal and retention rate
- Responsible for implementation and execution of fundraising events, workshops, socials
- Works with Professional Chapter's Social Chair, if applicable

### **Alumni Chapter Relations VP**

- Continue relations with graduates and Alumni Advisors (if applicable)
- Invite them to all AFP events and keep them abreast of chapter activities/projects
- Track successful alumni of AFP chapter and where they are in their careers (success stories)

### **Communications VP**

- Email all members about upcoming meetings/events/projects
- Regularly check AFP email account: (chapter email address)
- Update AFP Facebook page
- Works with Communication Chair of Professional Chapter as it relates to press releases, print

### **Faculty or Staff Advisor**

The Faculty/Staff Advisor for the AFP Collegiate Chapter performs the following:

- Creates a communications link to keep them abreast of happenings within the professional chapter, visa versa
- Provides mentorship and guidance to collegiate chapter initiatives and strategic development of the collegiate chapter
- Assists other faculty/staff advisors to hold up the mission and vision of the AFP Collegiate Chapter at (University.College) and program goals
- Guides the chapter in the development of professional business-like procedures, and meeting content
- Keeps on file a list of all collegiate chapter members
- Provides a central file for official materials
- Attends chapter meetings/events if applicable
- Notifies the Professional Chapter of important events within the chapter; as well as concerns, problems and any changes that affect the chapter's performance
- Serves as a mentor for the President as she /he may need advice pertaining to ethics
- Informs members of internship opportunities or projects that will enhance their career

### **Committees**

- **Chapter Executive Committee**: shall be composed of all the Collegiate Chapter Officers. The Executive Committee's duties may include setting the agenda and overview of the operations and budget of the Chapter. This committee will meet on a need basis.
- **Youth in Philanthropy (YIP) Committee**: is a committee of the (Professional Chapter) that supports the collegiate chapters. One representative from our collegiate chapter will be present at each meeting. The YIP Committee serves to build initiatives to educate students about philanthropy, professionalism, and guidance through their career goals.



## 6.2 Sample Grant Letter from the Professional Chapter

Date  
Collegiate Chapter  
Faculty Advisor  
Address  
City, State, ZIP

Dear \_\_\_\_\_,

On behalf of the Association of Fundraising Professionals (AFP) \_\_\_\_\_ Chapter, we are happy to be the sponsoring chapter for the \_\_\_\_\_ Collegiate Chapter.

As your professional chapter sponsor, we are here to help you as mentors, to help guide with chapter programs, to help with financial support and to assist in any leadership transitions.

In reviewing the document, How to Start and Collegiate Chapter, as well as the Collegiate Chapter Toolkit, a collegiate chapter is required to have at least 10 chapter members. To qualify as a member, students must be enrolled in a degree-granting, certificate or diploma program at an accredited college or university. Part-time graduate students are eligible unless they are working full-time in a fundraising capacity for a nonprofit organization, in which case they are expected to join the professional AFP chapter. In order to maintain an active collegiate chapter status, the collegiate chapter must sustain a minimum of 10 members.

The \_\_\_\_\_ Collegiate Chapter should meet on a regular basis, preferably monthly or at least quarterly. Each collegiate chapter must hold at least one official meeting each year to be designated the Annual Meeting for the purpose of electing chapter officers and approving chapter advisors.

Each Collegiate Chapter must comply with the annual AFP Board-directed Accord process, commonly referred to as Chapter Accord. Though most activities may take place between August and April, the fiscal year for a collegiate chapter is July 1 to June 30. Collegiate chapters will be required to provide the following information to AFP Headquarters by April 15<sup>th</sup> to end their year:

- Report of chapter activities during the current president's term of office
- Chapter program schedule for the ending year
- Budget or statement of the year's revenue & expenses as of March 31<sup>st</sup>
- Conformance to Bylaws signed by the incoming president (current president-elect)
- Affiliation Agreement or Affiliation Agreement Review signed by the incoming president (current president-elect)
- Chapter Leadership Form for the upcoming academic year.

In addition, the AFP \_\_\_\_\_ Chapter will award the \_\_\_\_\_ Collegiate College, a grant of \$\_\_\_\_\_ in \_\_\_\_\_ of this year. The professional chapter has budgeted these funds for the current year. However, the collegiate chapter will be required to provide a written report from the Faculty Advisor and Collegiate Chapter President on the status of the collegiate chapter, the activities the collegiate chapter has been engaged in, how funds from the \_\_\_\_\_ Chapter were used to support the collegiate chapter, what programs were presented, and what philanthropic event the collegiate chapter undertook. This report must be received by the Professional Chapter Advisor to be presented to the AFP \_\_\_\_\_ Chapter Board, either at the end of this academic year, or no later than September 15 of next year. No additional funds will be provided to the collegiate chapter unless this report is received.

We would also like to include information about the collegiate chapter in the professional chapter’s monthly newsletter. The Professional Chapter Advisor shares all information about the collegiate chapter with board members and the chapter membership.

Once again, members of the AFP \_\_\_\_\_ Chapter are here to help you in any way possible. Please do not hesitate to call or email your Professional Chapter Advisor, \_\_\_\_\_, at telephone number \_\_\_\_\_ or email at \_\_\_\_\_.

On behalf of the board of directors, we’re looking forward to great things from the \_\_\_\_\_ Collegiate Chapter!

Sincerely,

Name  
 Position (AFP Chapter President or AFP Chapter Membership Chair)  
 AFP \_\_\_\_\_ Chapter

NOTE: This document must be signed by both parties.

\_\_\_\_\_  
 Name Date  
 AFP Chapter Representative  
 AFP \_\_\_\_\_ Chapter

\_\_\_\_\_  
 Name Date  
 Collegiate Chapter Facility Advisor  
 \_\_\_\_\_ Collegiate Chapter

**6.3 Sample Contents of Monthly Collegiate Chapter Newsletter**



# Foundations

In Fundraising

## October 2015

Greetings, Collegiate Chapter Members!

As you prepare for the year, I want to provide you with a review of available AFP International support. Some of the below items I'd like to highlight are information about IHQ resources and the Collegiate Certificate Program. You'll also find information about the 2016 AFP International Conference on Fundraising in Boston, MA.

I've heard lots of great reports from chapters regarding new member recruitment, interesting chapter projects and chapter successes. If there is anything you would like to share with other collegiate chapter members, please contact me, and I will include this information in future newsletters.

I look forward to talking with you - thank you for all you do for AFP!

Sincerely,

Taryn R. Gold, MPA  
Director, Chapter Administration

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## Contents

- [Update Your Contact Information](#)
- **2016 AFP International Conference**
- **Collegiate Certificate Program**
- **IHQ Collegiate Chapter Resources for Chapter Leaders**

## 6.4 Sample: University of Florida Collegiate Chapter Handbook (2011-2012)

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**TO ACHIEVE YOUR DREAMS, REMEMBER YOUR ABC'S**

**ATTITUDE IS EVERYTHING**

**BELIEVE IN YOURSELF**

**CCARE ABOUT YOURSELF**

**DON'T GIVE UP AND DON'T GIVE IN**

**ENJOY LIFE TODAY**

**FAMILY AND FRIENDS ARE MOST IMPORTANT**

**GOD FIRST AND YOU'LL NEVER COME IN SECOND**

**HANG ON TO YOUR DREAMS**

**IGNORE THOSE WHO TRY TO DISCOURAGE YOU**

**JUST DO IT**

**KEEP TRYING NO MATTER HOW HARD IT SEEMS**

**LOVE YOURSELF FIRST AND MOST**

**MAKE IT HAPPEN**

**NEVER LIE, CHEAT, OR STEAL**

**OPEN YOUR HEART AND EYES**

**PRACTICE MAKES IMPROVEMENT**

**QUITTERS NEVER WIN AND WINNERS NEVER QUIT**

**READ, STUDY, AND LEARN ABOUT EVERYTHING IMPORTANT TO YOU**

**STOP PROCRASTINATING**

**TAKE CONTROL OF YOUR DESTINY**

**UNDERSTAND YOURSELF AND THEN LOOK TO BE UNDERSTOOD**

**VISUALIZE IT**

**WANT IT MORE THAN ANYTHING**

**XCELLERATE YOUR EFFORTS**

**YOU ARE UNIQUE OF ALL GOD'S CREATIONS, NOTHING CAN REPLACE YOU**

**ZERO IN ON YOUR TARGET, AND GO FOR IT!!!**

## Collegiate Chapter

### **Core Purpose**

To expose undergraduate and graduate students to fundraising as a profession, the importance of philanthropy and the vital role of ethics in professional practice.

### **Vision Statement**

Involvement in an AFP collegiate chapter will instill in students the rewards of professional fundraising as a career path and motivate them to pursue it as a career after graduation, as well as highlight the critical role philanthropy plays in our society.

### **Mission Statement**

The AFP collegiate chapters allow students to identify a cause to support, learn and apply ethical fundraising principles, and support the cause in which they believe, giving them a solid base of understanding and welcoming them into philanthropic and fundraising communities. The core activities to fulfill this mission include education, real life fundraising experience, mentoring and networking.

### **What is AFP?**

The Association of Fundraising Professionals (AFP) represents over 30,000 members in more than 217 chapters around the world. AFP works to advance philanthropy through advocacy, research, education, and certification programs. AFP believes that to guarantee human freedom and social creativity, people must have the right to freely and voluntarily form organizations to meet perceived needs, advocate causes, and seek funds to support these activities. To guarantee these rights, AFP's purposes are to:

- **Foster** development and growth of fundraising professionals committed to preserving and enhancing philanthropy;
- **Establish** and enforce a code of ethics and professional practices;
- **Require** member adherence to a professional code of ethical standards and practices;
- **Provide** training opportunities for fundraising professionals;
- **Implement** programs that ensure cultural and social diversity in our membership and leadership;
- **Collect**, research, publish and disseminate historical, managerial and technical information on philanthropy and philanthropic fundraising;
- **Promote** public understanding of philanthropy and philanthropic fundraising;
- **Conduct** activities that maintain and develop legislation favorable to philanthropy;
- **Enlist**, organize and support members to achieve our purposes;
- **Foster** international cooperation, knowledge exchange and education among fundraising professionals worldwide;
- **Use** all necessary and proper means to accomplish our purposes;
- **Provide** a valid and reliable certification program for fundraising professionals.

### **Who is Eligible for Membership?**

Membership of this chapter is open to all students who are working full or part-time toward a graduate or undergraduate degree at UNF and surrounding Universities, who are A&S fee-paying students in good standing with their

University, and who demonstrate an interest in learning about philanthropy, institutional advancement and the nonprofit industry.

**\*\*Recent graduates may apply for membership at the collegiate level within one year of their commencement.**

### **How often do we meet?**

Collegiate chapters meet on a regular monthly basis including a designated Annual Meeting for the purpose of electing chapter officers and approving chapter advisors. A Summer Retreat is also held to discuss current year accomplishments, develop program timeline for the upcoming year and set reasonable and reachable goals/expectations. The Executive Board meets on a need basis.

### **Who runs the chapter?**

Each chapter must elect officers and appoint committees to conduct local business. The Executive Officers of the Chapters shall be President, Vice President, Treasurer, Secretary, Membership/Recruitment VP, Communications VP, Social Event/Corporate Sponsorship VP, and Alumni Chapter Relations VP. All officers shall serve without compensation.

The length of the term will be from May until April of the following year. Any officer may resign at any time by serving written notice to the Chapter President or Chapter Secretary. Such resignation will take effect at the specified time. In case of resignation prior to completion of term, an individual may be selected by the remaining Chapter officers to complete the expired term. All officers must turn over to their successor all chapter records and/or property immediately upon completion of term or resignation prior to completion of term.

## **Roles and Responsibilities of Chapter**

### **President**

The President shall be the chief elected officer of the chapter. He/she shall preside at all meetings of the chapter and shall be an executive officer of all committees.

As the chapter's chief elected officer, the President shall be responsible for all chapter business. He/she shall:

- Appoint chapter officers and standing and temporary chairs. If there are two people vying for the same position, the **Advisor will pick** the best qualified or there will be a vote.
- Call special meetings as necessary (monthly or bi-monthly)
- Conduct the business of the chapter in consultation with the advisors
- Have a general knowledge of and responsibility for the supervision of Chapter business
- Prepare the agenda with other officers for all regular meetings and the Annual Meeting
- Act as spokesperson for the collegiate chapter; relay elevator speech
- Communicate with AFP Board of Directors, YIP Chair and Nonprofit Center of Jacksonville
- Complete accord materials before April 15 deadline to AFP IHQ

**Vice President**

- Act as President in his/her absence or if the President is not able to fulfill his/her duties
- Acquaint himself/herself with all the duties of the President and other officers, duties of all committees, chapter bylaws, and operating procedures
- Perform duties as assigned by the President

**Secretary**

- Prepare and distribute accurate minutes of all meetings of the chapter to all members
- Maintain chapter files of correspondence and program materials. Provide copies of the latest versions of these documents to all officers
- Prepare, with President/Vice President, member meeting/conference call agendas
- Other duties as assigned by the President

**Treasurer**

The Treasurer shall be the fiscal officer for the chapter and is responsible for all funds, as outlined in the Chapter Bylaws.

- Maintain all financial records, collect debts, make payments as authorized with YIP Chair
- Provide the President with financial information needed from chapter records for the annual report
- Assist in preparation of the annual budget and monitor chapter expenditures
- Meet with President/Advisor/YIP Chair for budget review on a yearly basis
- Work with President/Advisor to prepare operating budget proposal to AFP Board each November in preparation for December board retreat

**Membership/Recruitment VP**

- Report to the Chapter President at regular intervals
- Prepare and execute a membership recruitment/retention plan
- Promote cultural diversity in membership
- Send out Welcome messages to all new members
- Act as liaison between the Chapter President and AFP Florida First Coast Chapter on membership matters
- Develop a program to welcome new members and encourage their participation in chapter activities
- Create appropriate certificates/awards/recognition for members
- Collaborate with IHQ to receive appropriate recruiting materials each term

**Social Events/Corporate Sponsor VP**

- Assist the President and Vice President in planning and organizing events, contacting potential sponsors, attending conferences and retreats, building relationships with current corporate sponsors, and building intercollegiate relations
- Follow Program Timeline
- Responsible for increasing donor renewal and retention rate
- Responsible for implementation and execution of fundraising events, workshops, socials
- Works with Social Chair of AFP First Coast Chapter Board member



### **Alumni Chapter Relations VP**

- Continue relations with graduates and Alumni Advisors
- Invite them to all AFP events and keep them abreast of chapter activities/projects
- Track successful alumni of AFP chapter and where they are in their careers (success stories)

### **Communications VP**

- Email all members about upcoming meetings/events/projects
- Regularly check AFP email account: [afclub@unf.edu](mailto:afclub@unf.edu)
- Update AFP Facebook page
- Works with Communication Chair of AFP First Coast Chapter as is relates to press releases, print

### **Faculty or Staff Advisor**

The Faculty/Staff Advisor for the AFP Collegiate Chapter perform the following:

- Creating a communications link to keep them abreast of happenings within the professional chapter, visa versa
- Providing mentorship and guidance to collegiate chapter initiatives and strategic development of the collegiate chapter
- Assist other faculty/staff advisors to hold up the mission and vision of the AFP Collegiate Chapter at UNF and program goals
- Guide the chapter in the development of professional business-like procedures, and meeting content
- Keep on file a list of all collegiate chapter members
- Provide a central file for official materials
- Attend chapter meetings/events if applicable
- Notify the AFP Florida First Coast Chapter of important events within the chapter; as well as concerns, problems and any changes that affect the chapter's performance
- Serve as a mentor for the President as she /he may need advice pertaining to ethics
- Inform members of internship opportunities or projects that will enhance their career

### **Committees**

- **Chapter Executive Board Committee**: shall be composed of all the Collegiate Chapter Officers. The Executive Board Committee's duties may include setting the agenda and overview of the operations and budget of the Chapter. This committee will meet on a need basis.
- **Youth in Philanthropy (YIP) Committee**: is a committee of the First Coast Chapter that supports the collegiate chapters. One representative from our collegiate chapter will be present at each meeting. The YIP Committee serves to build initiatives to educate students about philanthropy, professionalism, and guidance through their career goals.

## **Philanthropy**

One of the primary roles of the collegiate chapter is to enter into the philanthropic process by choosing a project in the local community or on campus. It is up to the chapter to decide what the project will be.

- 1. Identify** – Research philanthropic causes of interest around your university campus or within the local community. Once you have identified some issues that the chapter is interested in as a cause, invite representatives from the organization to come in and speak with the students about their needs.
- 2. Select** – As a chapter, select the philanthropic project that you would like to raise money for. Do you want to give final approval to the board? Or to a group vote?
- 3. Begin** – Once the charity or project is identified, create a “Case for Support” that outlines the needs of the charity or project, and establishes a goal of how much money is needed. Develop a budget of anticipated revenue as well as expenses that will be required to conduct the project.
- 4. Fundraising** – Determine what kinds of fundraising strategies the chapter will engage in to raise the money for the project. More than one strategy may be required. Topics for your chapter meetings can be geared toward different types of fundraising strategies that will help you raise money.
- 5. Celebrate** – Once you have met your goal, have a celebration where the chapter can present the donation to the charity or project.

## Chapter Events and Programs

### Projects

Our AFP Collegiate Chapter engages in different fundraising initiatives on and off-campus. Several include: Big Fun Foundation, UNF Student Philanthropy Program/Council (SPC), Faculty Staff Campaigns, and helping other campus organizations, Greek Life, and additional local organizations.

### Job Shadowing

It is important for our collegiate members to gain first-hand experience in the non-profit sector. You will have an opportunity as a mentee to shadow non-profit, fundraising professionals in the Florida First Coast area on donor visits, learn how to write gift agreements, grants or proposals, and even sit in on a board meeting or a luncheon. The Job Shadowing application and requirements are included in the appendix.

### Conferences

The First Coast Chapter often offers scholarships to students who desire to learn more about fundraising. This gives students the opportunity to meet and learn side by side with top fundraising executives. ***Conferences attended are Planet Philanthropy, one-day local workshops and the AFP International Conference.*** Talk with your chapter advisor about upcoming conferences and scholarships.

### Club Fairs

UNF has two club fairs throughout the year where booths are setup for all the various clubs on campus and member recruitment takes place. AFP always has a booth with marketing materials and members available to answer questions. This is also a great opportunity to meet other clubs that will want to fundraise with you in the future.

### Chapter Meetings

Meetings should be held at the same time, on the same day every month. Meetings should not exceed an hour unless there is more business for the

executives to discuss after the meeting. An agenda will be drawn up for each meeting. Committee meetings and socializing will follow.

### **Skydiving**

Our Collegiate Chapter believes it is important to “Take the Leap and Dive into Action” everyday. We hold an annual skydiving event to give our students the opportunity to mix, mingle, network, and jump out of a plane with our successful UNF alumni, faculty, staff and students. This once-in-a-lifetime experience teaches students what they can accomplish and how they can develop after college and our alumni/friends enjoy helping them along their journey, making their dreams a reality.

### **Speakers**

Professional speakers can be a great educational asset. Make sure to research speakers before committing to an engagement. When you secure a speaker, state specifically who you are and what you’re asking of them. Remember the following tips:

- Give the speaker an idea of expected attendance and member interest
- Give a brief overview of your chapter’s philanthropy project so the speaker can tailor his remarks to help with the project
- Suggest what you think the chapter would find interesting and helpful
- Ask what would interest him/her most in addressing your group
- Provide him/her with a number of speaking dates from which to choose
- Exchange contact information
- Send directions to the meeting as well as information regarding parking
- Take brief notes to use when introducing the speaker
- Send out a thank you letter within one week of the engagement
- Keep a dossier of speaker information and performance evaluations in your files for reference for future chapter presidents

### **Workshops**

An important part of chapter programming is educating members through workshops. Workshops are periodically offered throughout the year. Workshop Topics Include:

- Fundraising 101, Business/Corporate Sponsorships: How to Gain and Keep Them
- Let’s Market You: Enhancing Your Resume, Cover Letter, Portfolio (and Interview)

### **Peer Referral Program**

This program allows current members to educate their peers about the importance of joining AFP and what it can do for their college career and beyond. Each student will be measured on the number of friends/peers they refer to the Chapter. At the end of the year, the student who refers the most people will receive a prize along with a certificate of achievement.

### **Life Beyond Graduation**

So, you’ve graduated! And it is time to get on with your life. Your AFP membership does not stop here. Continue your involvement as a member of one of our hundreds of AFP chapters worldwide. Membership allows you to join in the “Introductory” member category as the next step in your AFP experience. Talk with your Collegiate Chapter Advisor for information to transfer you membership on a national or international level.

## **Annual Report Academic Year 2010-2011**

Throughout the year, we had six chapter meetings, two conference calls, four AFP luncheons and monthly web conferences. We accomplished several goals for the 2010-2011 year. Our students have been a key factor in the launch of UNF's first Student Philanthropy Council. Meetings with AFP and SPC were held in conjunction over the past year so that AFP members could share their knowledge and experience about recruitment and marketing with the SPC.

Throughout the year, AFP has participated in events on and off campus including the Faculty Staff Campaign Holiday Breakfast, National Philanthropy Day, Annual Massage Therapy UNF Faculty Staff Event, AFP Luncheons, and the Dunk the Dean Event. We were able to send four of our students to the 2011 Planet Philanthropy Conference held in Jacksonville, Fl. One of our students was also able to attend the International AFP Conference held in Chicago. We held the 'Business Sponsor: How to Gain and Keep Them' workshop in the spring. Our workshops are open to all students, alumni and UNF faculty and staff. It helps students develop and improve their skills for successfully choosing, converting and closing business sponsorships and gifts. Students that attend will leave with a better understanding for donor relations and how to overcome financial burdens within their specified club or organization.

Two AFP students have completed and received their Collegiate Fundraising Certificate. We currently have three other students working hard to attain their certificate.

This year we were able to send Yvette Kibwika to the AFP International Conference in Chicago, Illinois. She received a scholarship to attend this prestigious conference. She was joined by two other collegiate chapter students from Florida.

The fourth annual Skydiving event was held in Titusville, Florida at the Skydive Space Center on April 30, 2011. An all-day event, students from several difference FL colleges and universities attended as well as additional community members. The event was a success with students, friends and alumni jumping and socializing.

We currently have eight alumni advisors available for our members. These advisors are invited to all of our meetings and events. Having these advisors gives our members the opportunity to network with them and learn more about what to expect from life after college.

Each collegiate chapter nationally has a fundraising project to plan and execute either within their community or on campus. At UNF, the AFP students are actively involved in the Faculty and Staff Campaign, the Big Fun Foundation (BFF), and the Student Philanthropy Council. For the Faculty Staff Campaign, they help with the set-up and breakdown of events, advertising and promotions and engaging internal support from 2,000 faculty and staff. With a Big Fun Bucks Challenge, the students compete to see who raises the most dollars for the BFF. The students have been actively involved in the first year of the Student Philanthropy Council. They have helped plan the schedule of events for the coming year, as well as layout the campaign strategy. They have been active in tabling at Market Days and we will have our first student awareness event, Tag Day, on November 16, 2011.

This year, we are hopeful to send two students to the 2012 Planet Philanthropy Conference which will be held in Orlando, FL. We also hope to be able to send two students next year to the AFP International Conference 2012 in Vancouver, Canada. We will continue to help with the UNF Faculty Staff Campaign, Big Fun Foundation as well as other non-profit organizations in need, but our main focus will be to build

the Student Philanthropy Council at UNF. In addition, we have an active RFP with Dreams Come True and look forward to partnering with their fundraising team in executing their annual events.

**Ongoing**

<b>Programs</b>	<b>Projects</b>	<b>Events</b>	<b>Meetings</b>
<b>Job shadowing</b>	Acquire Stationary	Recruiting	YIP Committee
<b>Dues (\$35/year)</b>	MPA Students	Web Conferences - Monthly	Budget Reviews
<b>Internships</b>	Newsletter		
<b>Sponsorships</b>	Review Bylaws		

**August 2010**

**September 2010**

<b>Programs</b>	<b>Projects</b>	<b>Events</b>	<b>Meetings</b>
<b>Prepare for FS2011 kickoff</b>	Info Meeting – Promos	Club Fest	Monthly Chapter Meeting
	FacStaff Campaign – Letters and brochure		AFP Luncheon - SJCC
	Speed Networking Fundraiser Planning		Info Meeting
			Executive Meeting

**October 2010**

<b>Programs</b>	<b>Projects</b>	<b>Events</b>	<b>Meetings</b>
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<b>Corporate Sponsor Workshop</b>	Sponsors: Mellow Mushroom, FLATS at Kernan	FS2011 Campaign Kickoff	Monthly Chapter Meeting
		JAX Zoo Tour	AFP Luncheon - SJCC

**November 2010**

<b>Programs</b>	<b>Projects</b>	<b>Events</b>	<b>Meetings</b>
		Speed Networking Event	Monthly Chapter Meeting
			National Philanthropy Day – Nov 10

**December 2010**

<b>Programs</b>	<b>Projects</b>	<b>Events</b>	<b>Meetings</b>
	Spring Planning		Monthly Chapter Meeting
			AFP Luncheon - SJCC
			Executive Meeting

**January 2011**

<b>Programs</b>	<b>Projects</b>	<b>Events</b>	<b>Meetings</b>
<b>Alumni Advisors</b>	Spring Planning	Spring Bash	Monthly Chapter Meeting

<b>United Way Campaign Tour – Kim Kaye</b>	Help SPC with ‘TAG’ Day		AFP Luncheon - SJCC
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**February 2011**

<b>Programs</b>	<b>Projects</b>	<b>Events</b>	<b>Meetings</b>
<b>Clara White Mission Tour</b>		‘TAG’ Day at UNF (w SPC)	Monthly Chapter Meeting
<b>Dreams Come True Tour – Jimmy Kelly</b>			AFP Luncheon - SJCC
			Budget Overview

**March 2011**

<b>Programs</b>	<b>Projects</b>	<b>Events</b>	<b>Meetings</b>
<b>Officer Elections</b>	Spring Planning	FS2011 Massage Therapy Event – Everest University	Monthly Chapter Meeting
<b>Business Sponsor Workshop</b>	Promote Skydive Event		AFP Luncheon - SJCC

**April 2011**

<b>Programs</b>	<b>Projects</b>	<b>Events</b>	<b>Meetings</b>
<b>AFP Sponsors – Costabile Travel</b>	Accord Process Due to AFP IHQ – Chapter Services	AFP International Conference – Chicago, IL	Monthly Chapter Meeting

<b>Review Referral Program</b>	Annual Report to AFP President	Senior Send off	AFP Luncheon - SJCC
<b>Resume/ Professional Portfolio Workshop</b>	Promote Skydive Event	Dunk Event – Round 2	Executive Meeting
		Skydiving (day after commencement)	

**May 2011**

<b>Programs</b>	<b>Projects</b>	<b>Events</b>	<b>Meetings</b>
	Packet for Admissions/ Orientation	Banquet – Success and Accomplishments Overview (combined with SPC)	Monthly Chapter Meeting
	Fall Planning		AFP Luncheon - SJCC

<b>Annual (proposed) Budget for AFP Collegiate Chapter</b>			
<b>January 2011-December 2011</b>			
	<b>Cost Per Month</b>	<b>Cost Per Semester</b>	<b>Cost Per Year</b>
<b>Operating Expenses</b>			
<b>Intercollegiate Relations: Flagler, EWC, JU, FCCJ, UF, FSU</b>		\$200	\$400
<b>Recruiting Events: Club Fest, Info Mtgs, Spring Bash</b>		\$100	\$150
<b>Workshops (4)</b>		\$125	\$500
<b>YIP Committee</b>	\$10	\$50	\$100



<b>AFP Monthly Member Meetings (7)</b>	\$20		\$140
<b>Conferences/Professional Dev't</b>			\$500
<b>Business Sponsor Program</b>			\$50
<b>Reward Program/Awards/ Recognition</b>			\$250
<b>Total Operating Expenses</b>			<b>\$2,090</b>
<b>Proposed Sponsorship Dollars</b>		<b>Per Semester</b>	<b>Per Year</b>
These dollars are solicited to fund additional events, professional development and conference opportunities for our AFP Collegiate Members.			
FLATS at Kernan		\$250	\$500
Costabile Travel		\$50	\$100
Other Potential Sponsors		\$300	\$600
<b>Total Sponsorship Dollars</b>		<b>\$600</b>	<b>\$1,200</b>
<p>The AFP Collegiate Chapter at UNF is a stand alone student-led organization housed in the UNF Annual Giving Program within the Division of Institutional Advancement. It does not have to adhere to the Code of Bylaws set by Club Alliance, an agency of Student Government. The reason for its sole status is due to the caliber of the members and prestige of its programming and initiatives.</p>			

## A Donor Bill of Rights

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

*I. To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.*

*II. To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.*

*III. To have access to the organization's most recent financial statements.*

*IV. To be assured their gifts will be used for the purposes for which they were given.*

*V. To receive appropriate acknowledgement and recognition.*

*VI. To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.*

*VII. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.*

*VIII. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.*

*IX. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.*

*X. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.*

### DEVELOPED BY

AMERICAN ASSOCIATION OF FUND RAISING COUNSEL (AAFRC)  
ASSOCIATION FOR HEALTHCARE PHILANTHROPY (AHP)  
COUNCIL FOR ADVANCEMENT AND SUPPORT OF EDUCATION (CASE)  
ASSOCIATION OF FUNDRAISING PROFESSIONALS (AFP)

### ENDORSED BY

INDEPENDENT SECTOR  
NATIONAL CATHOLIC DEVELOPMENT CONFERENCE (NCDC)  
NATIONAL COMMITTEE ON PLANNED GIVING (NCPG)  
COUNCIL FOR RESOURCE DEVELOPMENT (CRD)  
UNITED WAY OF AMERICA

# 2011-2012 Collegiate Chapter Members

(List of member names, emails, telephone numbers)

(List of Alumni Advisors names, companies, emails)

(List of Advisors: Faculty & Professional Chapter)

(AFP IHQ Chapter Services)

## AFP Collegiate Chapters

(List of Collegiate Chapters, Location, Advisor, Email, Telephone)

### MEMBERSHIP FORM 2011-2012

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Status: \_\_\_\_\_ Anticipated Graduation

Year: \_\_\_\_\_

Local Address:

\_\_\_\_\_

\_\_\_\_\_

Phone: \_\_\_\_\_

N#: \_\_\_\_\_ Email: \_\_\_\_\_

Major: \_\_\_\_\_ Minor: \_\_\_\_\_

Referred By: \_\_\_\_\_

**Other Club/Organizations Affiliations (internal to UNF and outside of UNF):**

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Are you passionate about UNF? Why?**

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**Why do you want to be a part of AFP?**

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**Which workshops would you attend? (Check all that apply)**

Fundraising *101* & Business Sponsorships: How to **Gain** and **Keep** Them

Let's Market *YOU*: Enhancing Your Resume, Cover Letter, Portfolio (& Interview)

*LIFE* after Graduation: Where will Your College Degree Take *YOU*?

PLEASE RETURN TO CLAIRE MILLER  
UNF ANNUAL GIVING  
BLDG. 60, ROOM 2202

I STATE THAT I MEET THE QUALIFICATIONS TO TAKE PART IN THE AFP FIRST COAST COLLEGIATE CHAPTER JOB SHADOWING PROGRAM. AS A MENTOR, I AM A MEMBER OF AFP. AS A STUDENT, I AM INVOLVED WITH A COLLEGIATE CHAPTER OF AFP. I UNDERSTAND THAT MY RESPONSIBILITIES INCLUDE BUT ARE NOT LIMITED TO:

**Mentor Expectations**

- Job shadowing opportunity should be half or full-day opportunity or time agreed upon by both student and Mentor.
- Mentor should provide meaningful opportunity for student to learn more about the First Coast Non- Profit Sector as well as pursuing career in Non-Profit/Development & Fundraising.
- Suggested Activities include:
  - Site tour of business or organization
  - Introduction to Development team and Organization team (illustration of structure of organization and “how it works”)

- Overview of goal(s) and mission of organization
- Participation in on-site\* donor or prospect meeting (confidentiality form provided to student in Job Shadowing packet)
- Review resume & career goals with student & offer pointers
- Q&A session with student
- Depending on length of shadowing opportunity, discuss plans for lunch ahead of time with your student.
- Consider providing small info packet or take-away for student
- Provide feedback to coordinators for use in refining program.

**Student Expectations**

- Have researched Mentor organization prior to shadowing.
- Dress professionally (Business Professional attire; Business Casual if approved by Mentor).
- Come prepared with list of questions for Mentor (about organization and fundraising, careers in non-profit, etc).
- Bring notepad, writing utensils, resume & list of career goals.
- Student is responsible for confirming meeting date, time, and place prior to shadowing. Depending on length of shadowing opportunity, discuss plans for lunch ahead of time with your Mentor.
- Provide feedback to coordinators for use in refining program.

SIGNATURE \_\_\_\_\_

DATE \_\_\_\_\_

Complete form and mail to:  
**(Professional Chapter Advisor contact information)**

## Job Shadowing Request Form

Date \_\_\_\_\_

The AFP First Coast Collegiate Chapter job shadowing program will match students interested in learning more about careers in non-profit with a professional mentor. Shadowing opportunities are for half-day or one-day sessions. Mentors must belong to AFP to participate in the program. Students are encouraged to be a member of a First Coast Collegiate Chapter. Please complete the information below to help us match you appropriately with a mentor.

Name \_\_\_\_\_

Email \_\_\_\_\_

College/University \_\_\_\_\_ Year & Major \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ Zip \_\_\_\_\_

Work Phone \_\_\_\_\_ Home phone \_\_\_\_\_

### Agency type:

\_\_\_\_\_ Arts/Cultural

\_\_\_\_\_ Health

\_\_\_\_\_ Higher Education

\_\_\_\_\_ Social Service

\_\_\_\_\_ Other (Specify) \_\_\_\_\_

Please check the topics of particular interest to you:

- Annual Fund/Giving
- Direct Mail
- Special Events
- Donor Prospecting
- Donor Database Management
- Moves Management
- Major Gifts
- Planned Giving
- Volunteer Management
- Board Development
- Other. Please List \_\_\_\_\_

Identify previous volunteer, fundraising or other nonprofit experience:

Complete form and mail to:  
(Professional Chapter Advisor)

## **6.5 Sample Collegiate Chapter Strategic Plan**

The mission of the Association of Fundraising Professionals (AFP) Collegiate Chapter at UNF is to educate young professionals about the nonprofit industry with an emphasis on ethical fundraising practices and career development. This mission is our intention for and direction in all decisions made by the Executive Officer team. The components of this strategic plan for the 2014-5 academic year were adopted on January 24<sup>th</sup>, 2014. This strategic plan is an internal document not meant to replace the Bylaws but to enhance the clarity of officer responsibilities and chapter goals for the 2014-2015 academic year.

### **Branding**

The Association of Fundraising Professionals (AFP) Florida First Coast Collegiate Chapter at UNF is the formal name for the chapter. It is referred to in short as the Association of Fundraising Professionals Collegiate Chapter at UNF. It is a nationally recognized chapter for its excellence and achievements. We will keep our brand strong through the following action steps:

- 1) Always refer to the chapter by one name: The Association of Fundraising Professionals Collegiate Chapter at UNF.
- 2) Never refer to the chapter as a student club.
- 3) Always make decisions with integrity and honesty and to the best of our ability so that the leaders of this chapter are known for their quality of work. This includes not rushing through our work and always editing the things we write.

### **Officer Role and Responsibilities**

The leadership of the AFP chapter have agreed to the below officer responsibilities to support our mission in a more successful and direct way this next academic year.

#### **President: (Name)**

The President shall be the chief elected officer of the chapter. He/she shall preside at all meetings of the chapter and shall be an executive officer of all committees. As the chapter's chief elected officer, the President shall be responsible for all chapter business. He/she shall:

- Appoint chapter officers and standing and temporary chairs. If there are two people running for the same position, the Advisor will pick the best qualified or there will be a vote. The responsibilities of any officer roles that are not filled will be filled by the chapter President.

- Call special meetings as necessary (monthly or bi-monthly).
- Conduct the business of the chapter in consultation with the advisors.
- Have a general knowledge of and responsibility for the supervision of chapter business.
- Prepare the agenda with other officers for all regular executive officer meetings and the Annual Accord Meeting.
- Communicate with AFP Board of Directors, YIP Chair and Nonprofit Center of Jacksonville.
- Complete accord materials before April 15 deadline to AFP IHQ.
- Hold officers responsible for their responsibilities.
- Recruit new members.
- Fundraise for the chapter as an individual and participate in fundraisers with the leadership team.
- Supervise the composition of the semester program timeline and calendar to be submit on the annual accord. Distribute it to all members as well as update it when changes are needed.

**Vice President: (Name)**

- Act as President in his/her absence or if the President is not able to fulfill his/her duties.
- Acquaint himself/herself with all the duties of the President and other officers, duties of all committees, chapter bylaws, and operating procedures.
- Compose the Program Calendar for the year to be used in the annual accord process and to help keep track of officer attendance and member attendance at events.
- Manage the distribution of flyers/or posters for on-campus events to the appropriate representative in the office of Student Government and/or Student Affairs. The printing of flyers will be done for free at the office of Annual Giving with our advisor: Claire Burn's permission.
- Perform duties as assigned by the President including facilitating meetings and preparing the agendas in her absence.
- Appoint chapter officers and standing and temporary chairs. If there are two people running for the same position, the Advisor will pick the best qualified or there will be a vote. The responsibilities of any officer roles that are not filled will be filled by the chapter President.



- Recruit new members.
- Fundraise for the chapter as an individual and participate in fundraisers with the leadership team.
- Distribute and compose officer binders at the beginning of each officer's term. Update binders every year. It is our goal by the end of the year to format these officer binders so they are not all generically the same but are tailored to each officer's role in the chapter to ensure they receive an binder that is written specifically so they will be able to achieve the most success possible as: i.e. Secretary.

**Secretary: (Name)**

- Prepare and distribute accurate minutes of all meetings of the chapter to all members.
- Maintain chapter files with copies of meeting minutes in the AFP office binder. This includes an electronic copy of all meeting minutes to be filed at the AFP computer in the Executive Student Assistant office computer at the office of Annual Giving at UNF.
- Other duties as assigned by the President.
- Appoint chapter officers and standing and temporary chairs. If there are two people running for the same position, the Advisor will pick the best qualified or there will be a vote. The responsibilities of any officer roles that are not filled will be filled by the chapter President.
- Fundraise for the chapter as an individual and participate in fundraisers with the leadership team.
- Recruit members.

**Treasurer: (Name)**

- The Treasurer shall be the fiscal officer for the chapter and is responsible for all funds, as outlined in the Chapter Bylaws.
- When possible, report to the Executive Officers at the monthly meeting about the current financial statements.
- Maintain all financial records, collect debts, make payments as authorized with the Youth in Philanthropy Chair.
- Provide the President with financial information needed from chapter records for the annual report.
- Assist in preparation of the annual budget and monitor chapter expenditures.

- Meet with President/Advisor/YIP Chair for budget review on a yearly basis.
- Work with President/Advisor to prepare operating budget proposal to AFP Board each November in preparation for December board retreat.
- Assist with fundraising and membership recruitment.

**Membership/Recruitment VP: (Name)**

- Report to the Executive Officers at each monthly meeting about new membership updates.
- Prepare and execute a membership recruitment/retention plan.
- Promote cultural diversity in membership.
- Send out welcome messages to all new members.
- Act as liaison between the UNF chapter and AFP Florida First Coast Chapter on membership and other matters.
- Appoint chapter officers and standing and temporary chairs. If there are two people running for the same position, the Advisor will pick the best qualified or there will be a vote. The responsibilities of any officer roles that are not filled will be filled by the chapter President.
- Develop a welcome packet modeled after the officer binder to welcome new members and encourage their participation in chapter activities.
- Create appropriate certificates/awards/recognition for members.
- Collaborate with IHQ to receive appropriate recruiting materials each term.
- Fundraise for the chapter as an individual and participate in fundraisers with the leadership team.
- Recruit members.

**Social Events/Corporate Sponsor VP: (Name)**

- Report to the Executive Officers at the monthly meeting an update on up and coming social and fundraising events.
- Serve as the point of contact for these events.
- Manages event publications and advertisements on Osprey Update and the UNF Calendar
- These events will be used to recruit new members, build team camaraderie with current executive officers and build intercollegiate chapter relations. These events are in addition to the monthly general members meeting and

executive officer meeting. They may take place at the same time and location of the Florida First Coast Chapter events.

- Follow program timeline outlined by the Vice President. One monthly meeting of members and executive leaders in addition to a meeting of only executive leaders will happen every month. A tour of a local nonprofit will be scheduled and led by the development staff at that nonprofit at least once a month.
- Appoint chapter officers and standing and temporary chairs. If there are two people running for the same position, the Advisor will pick the best qualified or there will be a vote. The responsibilities of any officer roles that are not filled will be filled by the chapter President.
- Works with Social Chair of AFP First Coast Chapter Board member when necessary.
- Recruit members.
- Fundraise for the chapter as an individual and participate in fundraisers with the leadership team.

#### **Alumni Chapter Relations VP: (Name)**

- Report to the Executive Officers yearly on her progress connecting with alumni of the chapter.
- Continue relations with current graduates and Alumni Advisors.
- Invite alumni to all AFP events and keep them abreast of chapter activities/projects.
- Track successful alumni of AFP chapter and where they are in their careers (success stories). Summarize this research in a small report for the Annual Accord Review.
- Recruit members.
- Appoint chapter officers and standing and temporary chairs. If there are two people running for the same position, the Advisor will pick the best qualified or there will be a vote. The responsibilities of any officer roles that are not filled will be filled by the chapter President.
- Fundraise for the chapter as an individual and participate in fundraisers with the leadership team.

#### **Communications VP: (Name)**

- Report to Executive Officers at the monthly meetings about communication issues.

- Update AFP Facebook page.
- Assist the Vice President in the distribution of marketing materials on campus.
- Communicate our events to the Flagler chapter
- Works with Communication Chair of AFP First Coast Chapter as is relates to press releases, print.
- Fundraise for the chapter as an individual and participate in fundraisers with the leadership team.
- Recruit members.
- Appoint chapter officers and standing and temporary chairs. If there are two people running for the same position, the Advisor will pick the best qualified or there will be a vote. The responsibilities of any officer roles that are not filled will be filled by the chapter President.

#### **Faculty or Staff Advisor: (Name)**

- Whenever possible, they will attend the Executive Officer monthly meetings, general membership meetings, and workshops sponsored by the AFP First Coast Chapter.
- Create and develop a communications link to keep student members abreast of happenings within the professional chapter, and vice versa.
- Providing mentorship and guidance to collegiate chapter initiatives and strategic development of the collegiate chapter.
- Assist other faculty/staff advisors to hold up the mission and vision of the AFP Collegiate Chapter at UNF and program goals.
- Guide the chapter in the development of professional business-like procedures, and meeting content.
- Provide a central file for official materials.
- Serve as a mentor for the President as she /he may need advice pertaining to ethics.
- Inform members of internship opportunities or projects that will enhance their career.

#### **Committees**

- Chapter Executive Board Committee: shall be composed of all the Collegiate Chapter Officers. The Executive Board Committee's duties may include setting the agenda and overview of the operations and budget of the Chapter. This

committee will meet once a month as a team to have conversations about current issues and goals. A separate agenda for this meeting will be written by the President of the chapter.

- Youth in Philanthropy (YIP) Committee: is a committee of the First Coast Chapter that supports the collegiate chapters. One representative from our collegiate chapter will be present at each meeting. The YIP Committee serves to build initiatives to educate students about philanthropy, professionalism, and guidance through their career goals.

## **Marketing**

Marketing of the AFP Collegiate Chapter at UNF will be done through the following action steps:

- 1) On-campus tools will be used for the majority of the chapter's advertising because there is not funding to pay for advertising. On campus tools include the Osprey Update, posters and hand-outs which can be put on assigned bulletin boards in 70 copies at a time. The Osprey Update can only be used for on-campus events and fundraisers. Events and announcements can be made at: <https://webapps.unf.edu/ospreyupdate/>. The policy for flyers on campus is: Five of these copies are delivered to SGA where those leaders post four of them and keep one of them for our file. The other 65 copies get delivered to the UNF Housing Department for distribution in the housing facilities on campus.
- 2) The chapter is in the need of an updated brochure and though a design has been chosen, there is not funding to print it or hire a graphic designer to add the finish touches. The leadership team will reach out to contacts they have in the printing industry in order to find a designer that could assist us with the design and printing as an in-kind gift or at a reduced cost.
- 3) The AFP Collegiate Chapter at UNF will continue to participate in events with the larger AFP Chapter at the First Coast in order to be a positive presence of the young leaders of tomorrow in front of the Executive and Development professionals working in the field today. Dell Robison has been chosen to represent the chapter in front of the First Coast chapter board. Her purpose is to educate those members on our activities, growth, and needs.
- 4) The AFP Collegiate Chapter at UNF will participate on the leadership team for an upcoming fair on campus sponsored by the UNF Career Center. This Volunteer Fair will take place on March 11<sup>th</sup> from 12-4pm in the Student Union Plaza. As part of the leadership team, the AFP chapter will find the lunch partner and sponsor for the event as well as receive a free table at the event to use for promotional opportunities as well as advertisement as members of the leadership team at the event and on all promotional materials for the event.

5) Participate in more young professionals networking groups in the area as a team and also individually.

6) Business cards for the new officers are needed but because of the lack of funding, our Youth in Philanthropy Chair and advisor: Lyndse Costabile will investigate using Vista Print in January 2014 that offers free business cards.

### **Fundraising**

The leadership team of the AFP Collegiate Chapter at UNF has a fundraising **goal of \$2,000** for 2014. To accomplish this goal, we will perform the following action steps:

1) We will continue partnering with the Jaguars Foundation and the Nonprofit Center of NE Florida in the Give and Go fundraising opportunity in 2014.

2) We have decided to partner with Basca in selling products made by the clients that come to their woodshop to learn the carpentry trade. These products that we will sell range from flower boxes to benches. There will be no up-front money but we will pay for the products we sell out of the money we make. It will be our responsibility to set the products at a price that will be profitable to us.

3) The leadership team has decided to no longer participate in the electronics recycling drive or the old text book drive through World Books because they produced only small monetary funds. We feel our time is better spent on opportunities that will raise larger amounts of money instead of just \$10-\$20 at a time.

4) All fundraised checks or cash will be given directly to Lyndse or Claire and not mailed to the P.O. Box address after January 1, 2014. This change is meant to save time and improve record keeping of money raised.

5) The executive leadership chairs are committed to applying for community grants to produce funding for chapter scholarships and needs. The Northeast Florida Donors Forum Directory is currently one of the tools the chapter is using to find appropriate donors for these grant applications. Whenever an officer commits to a grant application it is in their responsibility to notify all other officers and chapter advisors including Lyndse Costabile and Claire Burns of their work. This is so they can be mentored through the process and also to improve communication and accountability.

### **Tours and Collaboration with local Nonprofit Organizations**

Several RFP's have been received for 2014, but it was decided by the Executive Officers of the AFP Collegiate Chapter at UNF to focus on the relationships and partnerships we have with the American Red Cross and Basca. Beverly has set

up our first nonprofit tour on January 24<sup>th</sup> at 10am-12pm at the American Red Cross. It is in our intention to hold one tour of a nonprofit per month and invite the general student body to come with us in order to attract new members and foster a culture of support for local nonprofits on campus at UNF. These tours will be held on the 3<sup>rd</sup> Friday of the month from 10-12pm. Though we will tour other nonprofits, BASCA and the American Red Cross will be our main partners.

### **Meetings and Events**

The officers of the AFP Chapter at UNF will use the following meetings and events to accomplish their goals of membership recruitment, membership education, and increase the communication, openness and accountability of officers through these action steps:

- 1) General monthly meetings of the executive officers of the AFP chapter at UNF will occur on the 3<sup>rd</sup> Monday night of the month from 7:45pm-8:30pm in the UNF library. January 20, 2014 is the first meeting night of the year.
- 2) General member meetings will occur on the 4<sup>th</sup> Monday night of the month from 7:45-8:15pm in the UNF library. January 27, 2014 is the first meeting night of the year.
- 3) We will sponsor at least one tour a month of a local nonprofit organization.
- 4) Members and Executive Officers will attend events and meetings sponsored by the Florida First Coast chapter as often as possible.

### **7. Acknowledgements**

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