



# San Diego Philanthropy

San Diego Chapter, Inc.

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## PRESIDENT'S MESSAGE

Roderick Reinhart, CFRE

### San Diego AFP Chapter Receives Honors

AFP's annual Chapter Ten Star Award honors those chapters that have accomplished many of the key objectives outlined in AFP's strategic plan. The award encourages chapters to perform specific activities designed to increase professionalism within fundraising, and public awareness of the importance of philanthropy.

Only 20 of the 170 AFP chapters worldwide were recognized with the coveted Ten Star Award in 2002, and I'm proud to report that the AFP San Diego chapter was one of those chapters.

This award is testament to the fact that the programs and services we are offering locally to our members are of the highest quality and in line with what's current and what's needed.

This is the second year in a row that we have received the Ten Star Award.

My hat is off to our Immediate Past President, Dennis Smith, Ph.D., CFRE, for his outstanding two years of leadership as chapter President, and all of the AFP San Diego Chapter board members who contributed so much of their time and talent to make this award a reality. Congratulations to all!



## NATIONAL PHILANTHROPY DAY LUNCHEON - NOV. 12! CONGRATULATIONS TO SAN DIEGO HONOREES!

Outstanding Philanthropist  
Leonard and Edith Polster

Outstanding Philanthropic Organization  
Price Charities

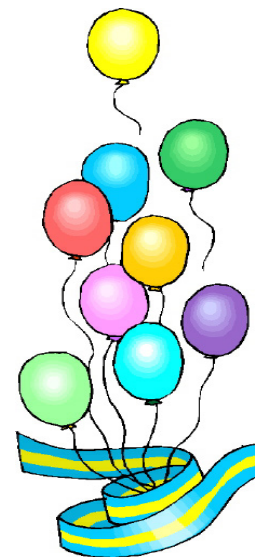
Outstanding Philanthropist Organization  
Rubio's Fresh Mexican Grill

Outstanding Development Volunteer  
Robert Horsman

Outstanding Organizational Volunteer  
James Dawe

Outstanding Youth/Student Volunteer  
Olivia Jacobs and Miranda Greenberg

Outstanding Development Professionals:  
Gordon (Zeke) Knight  
William R. Lewis, CFRE



The Association of  
Fundraising Professionals,  
San Diego Chapter, Inc.

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(888) 3-AFP-AFP  
office@afpsd.org  
www.afpsd.org

## FUNDRAISING 101 BENEFITS ALL!



The Fundraising 101 Workshop on September 12, 2003 introduced us to basic fundraising concepts and the integral components of a solid development program. Renowned presenter, Frank Hall, FAHP, led the workshop, which included a discussion of Increasing Funds in Tough Times during the luncheon program. Over 100 attended the workshop and 190 attended the luncheon program. We all thank Mr. Hall for sharing his insights with us!

## MARK YOUR CALENDAR NOW!

### Chapter Meeting: December 5, 2003

#### **New Models in Philanthropy - Right Here in San Diego!**

A Panel Discussion on New and  
Innovative Approaches to Funding

Does the concept of people with common interests getting together, pooling their financial resources and making strategic charitable contributions work? What are the advantages, and what are the problems?

Come learn how three different models of group philanthropy have successfully engaged new (and existing) donors in this latest trend in charitable giving. You'll hear first hand from the founders of three different San Diego-based groups relatively new to our community. See the web site for complete details: [www.afpsd.org](http://www.afpsd.org)

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## GOVERNMENT RELATIONS UPDATE

WASHINGTON (AFP eWire - Sept. 22, 2003)

The U.S. House of Representatives passed H.R. 7, the Charitable Giving Act, Wednesday afternoon, September 17.

The vote was nearly unanimous, with only 13 representatives voting against H.R. 7. These "no votes" were cast mostly by Representatives concerned about the current budget deficit. The bill is estimated to cost approximately \$12 billion; the current federal budget deficit is now over \$450 billion.

The Senate has already passed its version of H.R. 7, the Charity Aid, Recovery and Empowerment Act. The House and Senate will now go to a conference committee (made up of select members of the Senate Finance Committee and House Ways and Means Committee) to iron out the differences between the two bills.

H.R. 7 contains a number of new fundraising provisions such as the IRA Rollover provision and Non-itemized Deduction. The House version of the IRA provisions sets the age at 70 for which a donor can roll over funds from an IRA to a charity. However, the Senate version has the age at 59.

On the House floor, there was little discussion of the foundation payout provision. Under H.R. 7, certain administrative expenses will no longer be allowed to be counted towards the five percent payout required for private foundations. These expenses include:

- "Any administrative expense which is not directly attributable to direct charitable activities, grant selection activities, grant monitoring and administrative activities, compliance with Federal, state or local law, or further public accountability of the private foundation."
- "Any compensation paid to a person who is considered a disqualified person to the extent that such compensation exceeds an annual rate of \$100,000."
- "Any expenses incurred for transportation by air unless such transportation is regularly-scheduled coach-class commercial air transportation."

The Senate CARE Act does not include any provision related to foundations.

## DON'T MISS OUT ON YOUR AFP BENEFITS

### Local Chapter Benefits

- ✓ Networking Opportunities
- ✓ Monthly Chapter Meetings
- ✓ Online Member's Directory
- ✓ Mentoring Program
- ✓ Scholarship Opportunities
- ✓ San Diego Philanthropy Newsletter
- ✓ Discounted fees at events
- ✓ Volunteer Opportunities

- ✓ National Philanthropy Day
- ✓ Fundraising Conference
- ✓ Educational Workshops
- ✓ Local Professional Opportunities

### International Benefits

- ✓ Involvement
- ✓ Professional Development
- ✓ Continuing Education
- ✓ Approval Program

- ✓ CFRE/ACFRE Certification
- ✓ Fundraising Resource Center
- ✓ Ethics
- ✓ Professional Opportunities Postings
- ✓ Advocacy/Public Service
- ✓ Discounted Rates for Programs
- ✓ Fax-On-Demand Resources
- ✓ AFP Bookworks
- ✓ Audioconference Series

## WELCOME TO OUR NEW MEMBERS SINCE APRIL 2003

Kausar Ahmad, KNA Consultants  
 Mary Lou Aleskie, La Jolla Chamber Music Society  
 Cora Bagley, Poway Unified School District  
 Joshua Baxt, Scripps Foundation for Medicine and Science  
 Vincent Blocker, La Jolla Music Society  
 Dr. Bruce Braciszewski Ph.D., Classroom of the Future Foundation  
 Margy Brookes, Sushi Performance & Visual Art  
 Jessie Brooks, SDSU, Development Dept  
 Andrea Case, Scripps Memorial Hospital  
 Cheri DeQuattro, STAR/PAL  
 Shelly Dew, The Elizabeth Hospice  
 Donald Ehrlich, Community Campership Council  
 Malinda Engerer, Cardiovascular Disease Foundation  
 Elaine Evans, Community Campership of San Diego  
 Kathy Farmer, Fdn. to Advance Music Education  
 Irene Frank, Poway Unified School District Fdn.  
 Carl Fredericks, Carl & Christina Fredericks Fdn.  
 Lailani Frericks, The Union of Pan Asian Communities  
 Mauricio Gonzalez, Border View YMCA  
 Jay Hill, San Diego Public Library  
 Cara Hollander, San Diego Performing Arts League  
 Margot Howard, San Diego Public Library  
 Margaret Iwanaga-Penrose, The Union of Pan Asian Communities  
 Lillian Justice, Mexican American Neighbor Org.  
 Melanie Keating, YMCA Youth & Family Services  
 Kristin Kennedy, Wisconsin Humane Society  
 Kim Knouse, Volunteer San Diego  
 David Koos, Cell Bio-Systems, Inc.  
 Jeremy Kraut-Ordovery, California Western School of Law  
 Seth Adam Kritzik

Kendra Lee, Sidney Kimmel Cancer Center  
 Lisa Lipsey, Fraternity House, Inc.  
 Jennifer Mahoney, Casa de Amparo  
 Leane Marchese, ElderHelp of San Diego  
 Steve Marken, Tri-City Hospital Foundation  
 Luke Martin, YMCA Youth & Family Services  
 Regina Meyer  
 Eric Meyer, San Diego Symphony  
 Erin Miserlis, Center for Community Solutions  
 Gary Neiger, Escondido Humane Society  
 Christine Norell, Scripps Foundation for Medicine and Science  
 Stacy Pfeiffer, InterVarsity  
 Laurie Sanderson, Sidney Kimmel Cancer Center  
 Cathy Sang, Cathy Sang  
 Elizabeth Schiff, San Diego Natural History Museum  
 Holly Simonette  
 Ashley Sokol, Neighborhood Healthcare  
 Thelest Stewart, Autism Society of America  
 Donald Stump, San Diego Youth & Community Services  
 Dawn Tol, Mama's Kitchen  
 Tim Truitt, CFRE, Truitt & Associates  
 Dana Tully, Bell Gardens Farm  
 Shannon Wagner, Being Alive San Diego AIDS Services  
 Catherine Waters, International Cooperative Nursery School  
 Kathy West, Epilepsy Foundation of San Diego County  
 Dawn Yepez  
 Deborah Young  
 Leia Ziolkowski, National University



## CONGRATULATIONS TO OUR 2003 SCHOLARSHIP AWARDEES!

### Survey Course

- Marni Hayman, CFRE, National Wildlife Federation
- Erich Foeckler, St. Madeleine Sophie's Center
- Linda Sisti, Senior Community Center
- Katherine Karpe, Casa de Amparo
- Joy Chesbrough-Berry, Point Loma Nazarene University

### Chamberlain

- Karmyn Laverghetta, Floresta USA, Inc.

### International Conference

- Karen Amoroso, CFRE, Sidney Kimmel Cancer Center
- Deborah Stanley, Casa de Amparo
- Eduardo Valtierra, Global Education Through Music
- Karen Anisko, Jacobs Center for Nonprofit Innovation
- Zoneice Jones, Jacobs Center for Nonprofit Innovation
- Diane Moss, Jacobs Center for Nonprofit Innovation

### CFRE Exam Subsidies

- Marni Hayman, CFRE, National Wildlife Federation
- Karen Amoroso, CFRE, Sidney Kimmel Cancer Center
- Erich Foeckler, CFRE, St. Madeleine Sophie's Center

### Fundraising Day 101

- Rachelle Lisby, Bethel Seminary San Diego
- Laura Luce, OM Naso
- Cathy Sang
- Nancy Batterman, Community Options
- Kim Kleintob, Boys & Girls Clubs of Greater San Diego
- Renee Herrell, The Linfield Foundation, Inc.
- Candace Schuler
- Deborah Young
- Melanie Keating, YMCA Youth & Family Svcs.
- Holly Simonette
- Cara Hollander, San Diego Performing Arts League
- Jennifer Mahoney, Casa de Amparo

## CHECK OUT OUR PROFESSIONAL OPPORTUNITIES NOW POSTED ON WEB SITE ([www.afpsd.org](http://www.afpsd.org))

Fresh Start Surgical Gifts, Executive Dir.

The Old Globe, Special Events Manager

Scripps Foundation for Medicine and Science, Annual Giving Coordinator



Los Angeles Jewish Home for the Aging, Capital Campaign Director

Mt. Helix Park Foundation, Executive Dir.

Archdiocese of Los Angeles - Cathedral, Executive Director of Development

The Elizabeth Hospice, Senior Development Officer

Point Loma Nazarene University, Associate Director of the University Fund

Voices for Children, Grant Writer

The Alzheimer's Association, Special Events Coordinator

Agency for Jewish Education of San Diego County, Fundraising Director

## EMAIL NOTICES

Don't miss our email notices! If you are not receiving them, send your email address to: ([office@afpsd.org](mailto:office@afpsd.org))



## THE PROFESSIONAL PARTNER PROGRAM

The Professional Partner Program (PPP) is a member benefit of the San Diego Chapter of AFP. The program is designed to help newer professionals in their career development by matching them with more senior AFP members. **The purpose of the Professional Partner Program is to:**

- Strengthen the skills of newer AFP members with less than three years in Development or those who have assumed new job responsibilities.
- Develop a pool of skilled Mentors
- Increase the capacity of not-for-profit organizations to establish and maintain effective Development programs.
- Increase the pool of talent within the Development field.

The individuals being mentored are called Associates. Those offering their mentoring services are referred to as Mentors.

Mentors are matched to Associates based on compatibility of need, skills and interests as determined in their respective applications. The key ingredient for successful mentoring is the quality and strength of the relationship that develops between the two parties. It is not simply a matter of Mentors instructing or responding to casual questions.

Both parties may apply to be considered for the Professional Partner Program by completing a short application process and agreeing to the following requirements:

### Associates

- Be a member in good standing of the San Diego Chapter of AFP for 3 years or less
- Be currently employed in a not-for-profit organization
- Be a newcomer to the development field or new to a development or executive job

- Commit to participate for one full calendar year
- Be responsible for communicating goals to the Mentor
- Meet with the assigned Mentor regularly at mutually agreed-upon times
- Complete assignments agreed to with the Mentor
- Call the assigned Mentor at agreed upon times
- Be willing to complete a program evaluation

### Mentors

- Possess a minimum of five years of Development experience
- Commit to participate in the program for one full calendar year
- Commit to assist the Associate in accomplishing agreed-upon goals
- Meet with the assigned Associate regularly as mutually agreed-upon
- Schedule regular phone conversations with the Associate
- Contact the assigned Committee member for assistance in resolving concerns or challenges as necessary.
- Be willing to complete program evaluations

Visit the web site ([afpsd.org](http://afpsd.org)) for complete details of the program and qualifications. On December 5th, at 10:30 am prior to the Chapter Meeting, we will have a Professional Partner Program orientation at the Handlery Hotel.

Applications for a Mentor or an Associate may be obtained from any AFP chapter meeting or on the AFP San Diego Chapter's web site ([afpsd.org](http://afpsd.org)). The deadline for receiving applications in the AFP office is November 28.

Terri Rodgers, CFRE, and Brian Bowden, CFRE,  
Professional Partner Program Co-Chairs,  
Board of Directors