



San Diego Philanthropy

San Diego Chapter, Inc.

AFP San Diego 2003 Board

Executive Committee:

President

Roderick Reinhart, CFRE

President-Elect

Elizabeth Morgante, CFRE

Past President

Dennis Smith, Ph.D., CFRE

Secretary

Erich Foeckler

Treasurer

Janie Anderson, CFRE

VP, Community Affairs

Donna Johnson, CFRE, CSPG

VP, Membership

Cheryl Lane, CFRE

VP, Education - Sue Carter

Directors:

At-Large Member - Linda Spuck

CFRE Chair - Terri O. Rodgers, CFRE

Diversity & Outreach Chair

Erich Foeckler

EMC Chair

Dennis Smith, Ph.D., CFRE

Ethics Chair

Carole A. Fish, M.Ed., CFRE

Government Relations

Sandra Osborn

Membership Chair

Dan Denton, J.D., D.Min.

Newsletter/Media Relations

David Pierce

Philanthropy Day Chair

Linda Sisti

Professional Partner Co-Chairs

Brian Bowden, CFRE

Terri O. Rodgers, CFRE

Members:

Educational Program Team

Michael Jacobs, CFRE

Rachel Jonte

Alan Knobloch, CFRE

Ex-Officio National Board

Colette Murray, JD, CFRE

President's Message

WELCOME!

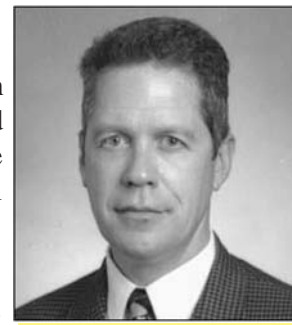
It's a pleasure to welcome you to a new year of AFP San Diego chapter programs and services. We have assembled a dynamic and experienced board of directors who have one clear goal in mind – to meet the professional development needs of our members!

To that end, we've put together an exciting lineup of monthly professional development programs, quarterly workshops on specific topics of interest, a new senior professional series, an all-day Fundraising 101 workshop for people new to the field, and the AFP Survey Course for mid-career folks. In other words, something for everyone!

I'm especially pleased that this year's board of directors has decided to offer more scholarships and subsidies to our members than at any other time in our history. We've already awarded six scholarships to local AFP members so they could attend the AFP International Conference on Fundraising, which was in Toronto in March. We will also be offering several additional scholarship opportunities for our members to participate in the AFP Survey Course in May and our Fundraising 101 workshop in September. In addition, we are engaged in a diversity outreach effort, the Colette M. Murray Fellows Program, [see accompanying article on page 6] which will provide full membership cost subsidies to five new AFP members for a period of two years.

We're proud to offer these opportunities to you, our members, to help foster your professional growth. We hope you'll take full advantage!

Roderick Reinhart, CFRE



A special note – our June 6th luncheon program will have a very special guest speaker (and a favorite colleague of mine), Patricia "Pat" Bjorhovde, CFRE. Pat serves as a member of the AFP International board of directors and is currently the Director of Development for the University of Arizona College of Fine Arts. Pat's luncheon topic will be "Youth in Philanthropy." Pat has recently authored a book on this timely subject and has graciously committed to making this appearance before our members to share her insights. If you're wondering who will be making gifts in the future, don't miss this important educational session!

Table of Contents

AFP San Diego 2003 Board	1
President's Message	1
Scholarship Programs Make A Difference	2
Mark Your Calendar Now!	2
Chapter's Funds Benefit Members	2
San Diego Hosts Survey Course	3, 6
Welcome to New Members	3
Student's Grant Center	4
Email Notices	4
Senior Development Program	5
Chapter Meeting Calendar	5
Colette M. Murray Fellows Pgm.	6
The Professional Partner Program	7



Scholarship Programs Really Make A Difference

Believing that participation in the AFP International Conference on Fundraising is an important step in a fundraising career, the San Diego Chapter is pleased to award scholarships to members who wish to go to their first conference.

The 2003 scholarship recipients were introduced at the February Chapter meeting. They are: Karen Amoroso, Karen Anisko, Zoniece A. Jones, Diane Moss, Deborah Stanley and Eduardo Valtierra.

Karmyn Laverghetta was named the 2003 Chamberlain Scholar, receiving \$500 from the chapter and \$500 from AFP International. The other awards were for \$750 each. The Chapter Board extends special thanks to the Jacobs Family Foundation, which is providing additional conference funding for several of the awardees.

These awards are made from funds that come from chapter events and dues and are a benefit of membership. Applications are accepted each November from members of the chapter who have never attended an AFP International Conference.

Janie Anderson, CFRE
Treasurer, Board of Directors

How The Chapter's Funds Benefit Members And The Community

An important element of stewardship is reporting how the money was used – and we want to report to YOU. Thanks to your dues and your attendance at our meetings, workshops and events such as Philanthropy Day and Spring Training, our chapter is able to provide significant benefits to you – the members of the chapter – and to members of the public wanting to know more about philanthropy and the best practices of fundraising. Here are benefits you are making possible in 2003:

- Scholarships to AFP International Conference - \$6,500
- Scholarships and subsidies for the CFRE exam, Survey Course & Fundraising 101 - \$2,275
- Education (including the mentor program, newsletter and non-food expenses of Chapter meetings and workshops) - \$9,240
- Outreach (including the Colette Murray Fellows and support for the new Baja California chapter) - \$4,225

The grand total is \$22,240. With your help, we are reaching out to new members, supporting professional development of our members and providing excellent and varied educational opportunities about all aspects of fundraising.

THANK YOU!

Janie Anderson, CFRE
Treasurer, Board of Directors

MARK YOUR CALENDAR NOW!

National Philanthropy Day

November 14, 2003, Wednesday
Sheraton Harbor Island

Fundraising 101 Special Day-Long Workshop

September 12, 2003, Friday
Handlery Hotel

Sr. Development Program: Learn How to Truly Measure the Impact You Make with Balanced Scorecard Workshop - Details coming soon, watch website at www.afpsd.org.

San Diego Philanthropy
Issue 1 - Spring 2003
Published Quarterly
AFP San Diego Chapter
POB 27184
San Diego, CA 92198



San Diego AFP Chapter Hosts Survey Course

The San Diego AFP Chapter is offering the Survey Course in Fundraising on May 9 and 10. The two-day program is presented in modules that touch on the essentials of fundraising, from identifying and involving donors to an overview of annual, planned and capital giving methods. Geared toward the intermediate-level fundraiser with three to five years of experience, the course will be presented by Mary Jean Gilbert and Dan Griffin, both Certified Fund Raising Executives (CFRE's) with successful consulting practices in Los Angeles.

The Survey Course will take place at Bethel Seminary in the San Diego State University area. The cost is \$350 to AFP members and \$425 to non-members; registration is underway until April 30.

A common question about the Survey Course is "will it prepare me for the CFRE exam?" CFRE International, an organization independent of AFP, does not sponsor or endorse any educational programs, and the Survey Course was not developed in conjunction with CFRE International. However, the course is a useful tool for learning and reviewing concepts that may be covered on the exam, which will be offered in San Diego on June 22.

Since many members could not travel to the AFP International Conference in Toronto, the Survey Course is a local and more affordable way to stay current on the best practices in fundraising. It promises to be a worthwhile program!

To help AFP members needing financial assistance, five scholarships of \$300 will be awarded from proceeds of the 2002 National Philanthropy Day.

Sue Carter, VP Education,
Board of Directors

Welcome To Our New 2003 Members

- Karen Anisko, Jacobs Center for Nonprofit Innovation
- Martha Baker, Home of Guiding Hands
- Sidney Baker, Project Concern International
- Barbara Boatman, Kintera, Inc.
- Victor Botello, Parent Institute
- David Bowers, California Western Law School
- Jack Chamberlain, The John O'Donnell Company
- Shirlee Croson, Christian Community Theatre
- Geri Danzig, Danzig Development Associates
- Teresa Davis, CFRE, Make-A-Wish Fdn. of San Diego
- Joseph Dini
- Rebecca Gaffney, San Diego Performing Arts League
- Judy Garrett
- Betsy Gordon, Alzheimer's Association
- Zoneice Jones, Jacobs Center for Nonprofit Innovation
- Annette Ketner, University of San Diego
- Rachelle Lisby, Bethel Seminary San Diego
- Marsha Lyon, St. Clare's Home
- Barbara Mandel Pache, Catalyst Network
- Diane Moss, Jacobs Center for Nonprofit Innovation
- Ingrid Prater, Mount Miguel Covenant Village
- Charles Robins, The Robins Family Foundation
- Sheila Ryba, American Heart Association
- Bonnie Steele
- Teresa Stivers, Child Abuse Prevention Fdn.
- Carol Williams, United Way
- Kyla Winters, Alpha Project





15-YEAR-OLD STUDENT TO START A GRANT CENTER AT WESTVIEW, A POWAY UNIFIED SCHOOL DISTRICT HIGH SCHOOL

With cuts in student programming at her school due to the budget crisis, a local high school student is taking matters into her own hands. Rachel Neumann, a sophomore at Westview, a new high school in the Poway Unified School District, is in the process of starting up a Grant Center in her school’s library. The center will be used as a resource for students, teachers, and administrators by providing a central location for finding additional funding for school programs.

As a Girl Scout, Neumann’s efforts to create the Grant Center stem from her goal to complete her Gold Award Project. The Girl Scout Gold Award is the highest and most prestigious award that a Girl Scout can earn. The project includes at least 50 hours of work, should meet an expressed need in the community, serve people beyond Girl Scouting, have a discernable result that will continue on, and meet all Safety-Wise guidelines.

“I am interested in making a difference that will have a lasting effect on my school,” said Neumann. “I hope that students, teachers, and staff will be able to use the center as a resource for years to come.”

With the ongoing budget cuts, local school programs are being cut. This is due to lack of funding and recent laws that restrict schools from asking parents to pay for their children’s extracurricular activities. For Westview, getting enough computers and basic supplies is a challenge with the budget crisis, let alone supplying funds for extracurricular programming. Merchant sponsorship, which has been generous with other district high schools, has also been spread thin with an additional high school now opened and looking for support.

Local merchant, Mark Abelkop, President of Poway Mitsubishi, has agreed to sponsor some of the initial start-up costs of the center. He has already donated a computer, digital camera, a palm pilot, and is offering a \$100 donation to Westview each time a “Westview Family” purchases a car from Poway Mitsubishi. “We want the community to feel like we are a part of them,” said Abelkop. “This is just one step toward building a lasting a relationship.”

Neumann’s goal is to have a grant center for students, teachers, and staff where they can find grants specific to the program(s) they would like to implement. The grant-seeker will then be matched with a student-volunteer grant-writer. Once the grant is received, the center will monitor the program and provide the necessary documentation for each grant. In the first year of operation, the goals include setting a procedure for needs analysis and prioritizing, to obtain at least two grants by the end of the semester, and to build awareness in the community about the program.

Neumann is still in need of supplies for the center, including a laptop since she will be working in several different areas. For more information or to make a donation, please contact Linda Neumann at (858) 573-9977.

Email Notices
Don’t miss our email notices!
If you are not receiving them,
send your email address to:
(office@afpsd.org)

The Senior Development Program: *A Fundraising Think Tank*

The Education Committee is introducing a Senior Development Program this year to enhance membership value to senior development professionals. The program's mission is:

- To provide an on-going forum for discussion of topical issues
- To provide an affinity group for senior development professionals
- To increase networking opportunities among senior development professionals

The Senior Development Program is offered to current members with a CFRE, or service on an AFP Board (chapter or national level) or 10 years of professional fundraising experience, and admission is free.

The sessions will usually be offered in the early morning and be comprised of a one-hour facilitated discussion based on readings and/or case studies that will be provided to participants prior to the session. Three programs are being developed for the year and will take place in July, September and November. Specific dates and discussion topics will be finalized and announced soon.

We would like to hear from interested senior development professionals about topics or issues they would like to have considered for future sessions. Also, please let us know if you would like to host or facilitate a Senior Development Program session. Vaughn Welty is the project coordinator and he can be reached at 619-283-6209.

2003 Chapter Meeting Calendar

All Chapter Meetings are held the first Friday of the month with exceptions for Holidays. We meet at the Handlery Hotel (950 Hotel Circle North). Please sure to check our web site for updates or changes.

May 2 - The Direct Response Fundraising Laboratory by Steven Rusk, CFRE

June 6 - Youth in Philanthropy by Pat BJORHOVDE, CFRE

July 11 - Fraud, Flakes and the Fun of Ethics Luncheon and Ethics Workshop by Bill J. Harrison, CFRE

August -DARK

September 12 - Special Fundraising 101 Presentation: Morning and Afternoon Fundraising 101 Workshop with luncheon presentation (Increasing Funds in Tough Times) by Frank Hall, FAHP

October 3 - Planned Giving, Panel Presenters TBA

November - DARK

December 5 - New Trends in Foundation Giving by Panel





The Colette M. Murray Fellows Program

The Colette M. Murray Fellows program is an outreach initiative to encourage diversity within our profession. It is intended to reach persons working with nonprofit organizations in San Diego County serving people of color and/or GLBT (Gay, Lesbian, Bi-sexual and Transgender) communities. The Chapter’s objective is to offer our educational resources and the collective professional expertise of our membership – in accessible and user-friendly formats— to assist individuals in building their organization’s capacity and professional fundraising skills.

The Chapter’s ultimate goal is to encourage greater numbers of persons from and/or persons serving culturally and ethnically diverse backgrounds to become active members of AFP San Diego, AFP International, and our profession. We believe that the result will be of significant mutual benefit, with the Chapter demonstrating AFP’s value to those not familiar with the Association, and with the Fellows

assisting AFP, both at the Chapter and International levels, to be more responsive to their needs and to those of the wider fundraising community.

Each of the participants is receiving AFP member scholarships and will assist at all chapter functions.

Please welcome each of the fellows the next time you attend a chapter function.

- Stacy Pfeiffer, Development Director for InterVarsity
- Mauricio Gonzalez, Executive Director for Border View YMCA
- Shannon Wagner, Executive Director for Being Alive San Diego
- Lisa Lipsey, Development Director for Fraternity House, Inc.
- Dawn Tol, Development Associate for Mama’s Kitchen

A SPECIAL EVENT! The Survey Course in Fundraising, May 9 & 10, 2003 by Mary Jean Gilbert, CFRE and Daniel T. Griffin, CFRE

The AFP Survey Course in Fundraising offers development professionals an opportunity to review the main components of a complete fund-raising program. It is a two-day, intensive program that focuses on the terminology, organization, and structure of a development operation. Topics include:

- * History of Philanthropy
- * Laying the Foundation for Fund Development
- * Defining an Integrated Development Program
- * Annual Giving & Fundraising Methods
- * Identifying, Involving, and Retaining Current and Prospective Donors
- * Capital Giving
- * Planned Giving
- * Making the Case
- * Volunteers and Staff: Roles, Responsibilities and Relationships

See the web site for complete details: www.afpsd.org. Registration deadline April 30, 2003!



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) for complete details of the program and qualifications. On May 2, 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. The deadline for receiving applications in the AFP office is April 30.

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