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SPECIAL ■ ALL ■ F 2004

SAN DIEGO Philanthropy

A NEWSLETTER PRODUCED BY THE ASSOCIATION OF FUNDRAISING PROFESSIONALS, SAN DIEGO CHAPTER

ANNOUNCING: National Philanthropy Day Awards Luncheon

2004 Honorees

Details

Tuesday, November 9, 2004

Marriott Hotel and Marina
333 West Harbor Dr.
San Diego, CA 92101

11:00 AM: Registration

11:00 - Noon: Reception
Honorees will be available to receive your congratulations

Noon - 1:30 PM: Luncheon and Awards Presentation

Registration Deadline: Oct. 29, 2004

Call to request an invitation:
888-323-7237 (tollfree)

Online Registration:
www.afpsd.org

CELEBRATION

National Philanthropy Day is celebrated across the nation every year to recognize the important role that philanthropy plays in enriching our communities. This celebration allows us to honor the individuals and organizations whose gifts of time, talent and treasures strengthen the diverse richness of the San Diego community.



This year's chair, Sharon LeeMaster, CFRE, The Alford Group, invites you to join the Association of Fundraising Professionals for San Diego's celebration of National Philanthropy Day.

Many thanks to Darlene Marcos Shiley and Donald P. Shiley, the honorary chairs for Philanthropy Day. Their Honorary Committee completed the selection process of honorees and wish to thank the many individuals and agencies who submitted nominations.

We extend a very special thanks to our sponsors, Sempra Energy, KGTV/ San Diego's 10, Union Bank of California, Qualcomm, San Diego Grantmakers, National University, San Diego Magazine, San Diego National Bank, and The Fieldstone Foundation.

Special Tributes
Joan B. Kroc
Helen K. Copley

Outstanding Philanthropic Organization
San Diego Women's Foundation

Outstanding Philanthropic Corporation
Cox Communications

Outstanding Organizational Volunteer
Katie Sullivan

Outstanding Youth/Student Volunteers
Alexis Tarbet
Gidget Schultz

Outstanding Development Volunteers
Yolanda Walther-Meade
Yolanda S. Walther-Meade

Outstanding Development Professional
Janie Anderson, CFRE

AFP MEMBERS' OWN WORDS

Over one year ago, I had an opportunity to speak to an AFP luncheon attendee about a job opportunity at San Diego Food Bank. It was helpful to me in my decision to pursue the opportunity and I've now been at the Food Bank for about a year and a half!

Maureen Polimadei

I am reminded of Frank R. Hall, who was the guest presenter at AFP's seminar last September. Mr. Hall confirmed several points I had been trying to make to our fundraising committee for some time. Specifically, "when to ask," and "working from a database" of information on donors. I had already used an existing donor base to raise over \$50,000 in direct mail campaigns, and his input confirmed that I was right on the track. THX

Ned Lee

AFP San Diego Chapter has given me a unique outlet to network with my colleagues and to collaborate on numerous fundraising and program efforts. This chapter offers many wonderful speakers and training sessions that have helped me and my development staff attain ideas and knowledge in enhancing our fundraising efforts. Thank you.

Britta Justesen, MIBA
Family Literacy Foundation

The AFP San Diego Chapter has helped me grow in my profession due to our members' and speakers' willingness to impart with new, different and creative techniques of fundraising through workshops and networking opportunities.

Kendra Lee
Sidney Kimmel Cancer Center Fdn.
(continued on page 4)

President's Message

BY
ELIZABETH
MORGANTE, CFRE



I used to be like most of you: a member in good standing of the AFP, attending as many luncheons and workshops as I possibly could, but due to my hectic schedule probably missing more than I actually made. (It's tough making time to spend two or more hours away from the office every month!) It wasn't until I joined the chapter board that I consistently attended more than the occasional AFP event, and boy am I glad I did.

Beyond the professional networking and social benefits of seeing colleagues on a consistent basis, the educational benefits of learning from such a variety of experts and masters in our field is beyond value. Last month's chapter luncheon was an excellent example of the wisdom

shared and gained to me valued at least 10 times the cost of the luncheon. Veteran fund raisers Blair Blum, Ann Campbell and Bill Littlejohn shared war stories and their take on the challenges and rewards of our profession. David Mitchell moderated by asking thought provoking questions and sharing his own thoughts. Those lucky enough to be there took away valuable information well worth the time and cost.

Prior to the lunch, a fantastic session on direct mail was presented by Wendy Katz. Feedback from attendees was overwhelmingly positive. You won't want to miss her next workshop which will be announced soon. Since professional

education is a major component of the AFP, I would like to thank all of our educational presenters this year and acknowledge Carole Fish and her fantastic education committee for organizing these valuable sessions. Do yourself a favor - make the time to attend our upcoming programs!

On a final note, I would like to acknowledge the efforts of Diane Prock who has served as our Chapter Administrator with professionalism and dedication since 1997. She was instrumental in the planning of our recent Professional Development Conference, produces this newsletter and our web page, and does countless tasks each day on our behalf. Diane has really helped our chapter achieve new heights.

EDUCATION IS FREEDOM!

Looking for the most up to date information on regional donors, where they live and what they are giving? Wondering whether Sarbanes Oxley Act of 2003 is going to impact you, your board and your nonprofit organization and the way you do business? Seeking hands-on instruction from fundraising experts on such programs as starting a planned giving program, a direct mail or major gift stewardship that creates results? This year's Education Committee has offered a year of outstanding speakers and topics but you don't have to be disappointed that you missed it. There is much more to come yet this year!. Our chapter meetings are generally held on the first Friday of each month (except for holidays). Come join us.

Watch for our program notices on the AFP website at www.afpsd.org or in the AFP email notices (if you aren't getting our email notices, email Diane Prock at office@afpsd.org and she will add you to our email.

MEMBERSHIP

Why Join AFP?

SUBMITTED BY
ERICH FOECKLER, CFRE
AFP VP, MEMBERSHIP

AFP is the only association representing the entire fundraising profession – and our numbers are growing! Why? Because AFP offers the best networking opportunities, an unwavering commitment to the highest ethical standards, and the most exciting and cutting-edge educational and professional advancement opportunities.

The association not only serves and represents the fundraising profession, but also advocates for and advances the role of philanthropy and volunteerism in society. AFP has responsibilities not only to its members and the profession, but also to donors and volunteers around the world, since it is only through the generosity of these individuals that philanthropy continues to thrive.

AFP represents over 25,000 members in 170 chapters throughout the world working to advance philanthropy through advocacy, research, education, and certification programs. Our members work with every conceivable type of group – health, education, social services, the environment, and arts, to name just a few – and are involved in every aspect of fundraising, including donor relations, board development, planned giving and special events.

Call Diane Prock today to get your membership application - 1-888-323-7237 or email her at office@afpsd.org.

AFP MAKING NEWS



5
AFP MEMBERS'
RESOURCES

AFP TO CONGRESS: PROHIBIT PERCENTAGE-BASED COMPENSATION!

One of the most important steps Congress can take in increasing public confidence in charities is to outlaw percentage-based compensation. AFP President and CEO Paulette V. Maehara, CFRE, CAE, told U.S. Senate Finance Chairman and key committee staff members at a July 22 roundtable on charity regulation.

The roundtable was set up by Finance Committee staff to hear feedback and comments regarding a discussion paper released by the committee in June. AFP was one of nearly 20 speakers at the roundtable, which was attended by more than 100 representatives from charities and regulatory agencies, including the Internal Revenue Service (IRS), Federal Trade Commission and state charity offices.

AFP noted in its written comments that the critical issue is sufficient funding for the IRS and other agencies. "In almost all cases, the current laws are sufficient; the

problems lie in enforcement. And if additional laws are needed, they should be fashioned to target wrongdoers without burdening legitimate charities."

Maehara noted that percentage-based compensation is flawed for several reasons, including:

- Charitable mission often becomes secondary to self-gain.
- Donor trust can be unalterably damaged.
- There is incentive for self-dealing to prevail over a donor's best interests.
- Percentage-based compensation can produce reward without merit.

"Few new initiatives could do as much to limit future fundraising abuses as outlawing percentage or commission-based fundraising," she said to the roundtable participants. She also urged Congress to pass S. 476, the Charity Aid, Recovery and Empowerment (CARE) Act.

SUBMITTED BY
ALAN KNOBLOCH, CFRE
AFP GOVERNMENT RELATIONS



1.

PROFESSIONAL ADVANCEMENT

Educational programs offered online and in classroom settings

2.

RESOURCE CENTER

A library with more than 3,200 reference works, of which you can request copies at no charge

3.

MEMBERSHIP DIRECTORY

An important networking and resource tool for more than 25,000 members

4.

ADVANCING PHILANTHROPY

A magazine that includes interviews, articles, current research and public policy information

5.

ANNUAL CONFERENCE

Offering more than 200 educational sessions, along with networking with nearly 4,000 other fundraising professionals

ArtsBusXpress: THE LITTLE ENGINE THAT COULD

When asked to serve as Executive Director of ArtsBusXpress last January, I knew that giving San Diego children "A Ride to the Arts" was an inspiring idea – and so simple: provide free transportation to connect school classrooms with arts and culture. I was an experienced arts manager who relished a challenge, but putting wheels under the ArtsBusXpress vision required accelerating my fundraising potential.

The Association of Fundraising Professionals offered just the ticket, and I quickly got on board with an on-line class, Seattle conference, published materials, chapter meetings, local workshops and professional development opportunities. Best of all were the new colleagues and role models I met. We were all headed in the same direction and united in our

professional commitment – great company for the road ahead.



Already I feel the momentum picking up as ArtsBusXpress volunteers respond to new fundraising concepts and ideas. AFP provides a strong framework to support my leadership: I know who to turn to with questions and where to go for answers. I relish the opportunities AFP offers to learn from others and to provide insight into the how and why of fundraising:

practical advice to grow a little engine into a big locomotive.

So here's to the success that lies just over the top of the hill, and – thanks to AFP – being able to say: I knew I could. I knew I could. I knew I could!

BY CHERYL BROWN,
EXECUTIVE DIRECTOR,
& AFP MEMBER



PLAN TO ATTEND:

AFP MONTHLY ORIENTATION



NEW
MEMBERS

Welcome

May - July 2004

JENNIFER BECKEY, FWE San Diego
CHRISTINA BOLANOS, Monarch
School Project

DEBRA CECIL

JUDY FORRESTER, San Diego
County Medical Society Foundation

LABRINA HARPER STRATTON,
UCSD School of Pharmacy

LORNA HIRAE-REESE, Project
Concern International

JAN HOOPER

NICHOLE KEITH

SARAH KHORASANEE, Pacific Safety
Council

LARIE PRESA, National University

MARK SACARIS, Traxion World
Medical, Inc.

MISTY SALMI-PENNINGTON, The
Jenna Druck Foundation

STEPHEN SANTORE, Compro Search

JEANNE SCHMELZER, CFRE, Netzel
Associates, Inc.

RICHARD STERN, San Diego Blood
Bank Foundation

ELIAS TERMAN, AuctionHandoff, LLC

LINDSAY TROWBRIDGE, Girl Scouts,
San Diego-Imperial Council

JEFF TYLER, Lamb's Players Theatre

JENNIFER WILLIAMSON, Golden
Care Workforce Institute

FOR MEMBERS AND PROSPECTIVE MEMBERS

We would like to invite you to join us for our AFP Orientation at 11:00 a.m. before every chapter meeting. For those AFP members who have never attended, or for those of you who are thinking about joining AFP, we strongly encourage you to attend. Come learn how you can take advantage of all that AFP has to offer.

Some of the topics discussed are: Who is AFP, what do we do, and what is a CFRE. The orientation is given by current AFP board members who are happy to answer any questions you may have. We hope to see you at the next orientation.

AFP MEMBERS' OWN WORDS (continued from page 2)

AFP-San Diego has provided Alpha Project with meaningful opportunities to recognize organizations that have supported not only Alpha Project, but other notable agencies throughout the county. AFP-San Diego's Philanthropy Day gives non-profits the opportunity to pay homage to people and organizations that make a difference in our programs, and ultimately our communities. Thank you for providing a forum in which we can formally thank those who give so much.

Kyla Winters
Alpha Project

AFP is a valuable resource to me and my colleagues here at St. Madeleine Sophie's Center. It offers great educational workshops---with scholarship opportunities for some of the smaller non-profit organizations such as ours---and the chance to network with other professionals in the field.

Jane Walstrom, CFRE
St. Madeleine Sophie's Center

TO GET INVOLVED: PLEASE CONTACT DIANE PROCK
AT 888-323-7237 OR EMAIL OFFICE@AFPSD.ORG



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