



# San Diego Philanthropy

San Diego Chapter, Inc.

## CALENDAR OF EVENTS

### June 3, 2004

Professional Development Conference

### July 9, 2004

SPECIAL Workshop (9:00 - 3:00 pm): Annual Giving Workshop by Wendy Katz.

Chapter Meeting (Noon - 1:30 pm): Senior Panel Presentation: Panel: Ann Campbell, Jim Langley, Blair Blum, Bill Littlejohn

### August DARK

### September 10

Workshop: Planned Giving  
Chapter Meeting: Rich Heinrich Memorial/Planned Giving

### October 1

Workshop: TBD  
Chapter Meeting: TBD

### November 12

National Philanthropy Day

### December 3

Chapter Meeting: Funders Panel, Bob Kelly, Julie Holdaway



## PRESIDENT'S MESSAGE

Elizabeth Morgante, CFRE

Dear San Diego Chapter,

As fund raising professionals in the not-for-profit sector we know all too well the value of volunteerism. Without it many of our organizations would not exist. A lot of us serve as volunteers for community organizations that are close to our hearts, in addition to the organizations where we work. I would like to suggest another option where we can all receive a direct return for our gift of time: Right here at our own AFP.



Volunteering for the AFP can mean many things:

1. Committee work (we've got lots to choose from!)
2. Mentoring (there is an unmet need to assist those new to the profession.)
3. Board positions (we're always looking for new blood!)
4. Conference and event planning (Professional Development Day, Philanthropy Day and the International Conference to name a few!)
5. Registration at monthly luncheons, workshops and events

Time commitments can range from a few hours a year to as much time as you've got to spare!

The benefits of volunteering with the AFP are:

1. Peer Networking (not only with local and national, but international professionals who can serve as future resources for jobs and assistance)
2. Advancing the Profession (as my boss likes to say: "The rising tide raises all ships." This will only help us in our philanthropic efforts.)
3. Lasting Friendships (You can never have too many friends. Plus, you can talk shop and they will get it!)

Some of you may feel you are already well connected in the industry or you are so busy raising money, there just isn't time to spare for the AFP. I say, please reconsider. Where would we be without this wonderful organization to help advocate our issues, celebrate our donors and educate the world about philanthropy? Isn't it time we gave back just a little to the profession that has been so good to us?

Yours in AFP,

Elizabeth Morgante, CFRE  
President, AFP, San Diego Chapter  
Vice President, Chief Development Officer, Sharp Grossmont Hospital

## 2004 BOARD MEMBERS

### Executive Committee:

President, **Elizabeth Morgante, CFRE**  
 President-Elect, **Donna Johnson, CFRE, CSPG**  
 Past President, **Roderick Reinhart, CFRE**  
 Secretary, **Rachel Jonte**  
 Treasurer, **Janie Anderson, CFRE**  
 VP, Community Affairs, **Cheryl Lane, CFRE**  
 VP, Membership, **Erich Foeckler, CFRE**  
 VP, Education, **Carole A. Fish, M.Ed., CFRE**

### Directors:

Diversity & Outreach Chair, **Rachel Jonte**  
 EMC Chair, **Roderick Reinhart, CFRE**  
 Ethics Chair, **Jennifer Svihus, CFRE**  
 Government Relations, **Alan Knobloch, CFRE**  
 Membership Chair, **Katherine Karpé, CFRE**  
 Mentorship Chair, **Karen Amoroso, CFRE**  
 Newsletter, **David Pierce**  
 Philanthropy Day Chair, **Sharon LeeMaster, CFRE**  
 Professional Dev. Conference Chair, **Linda Spuck**  
 Public Affairs / Awards, **James DeLauro, Ph.D**  
 Scholarship Chair, **Allen Baytop**  
 Youth Chair, **Karny Stefan**

### At Large Members:

**Charles Day, CFRE**  
**Amy Parrott**  
**Dr. Dennis P. Smith, CFRE**

### Ex-Officio

**San Diego Chair, AFP International**

### Board of Directors

**Colette Murray, JD, CFRE**



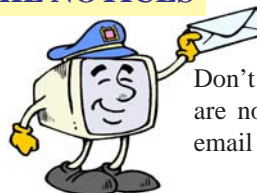
## MEMBERSHIP UPDATE

Our chapter here in San Diego continues to grow! Our new Membership Chair, Kathy Karpé, CFRE, has been conducting new member orientations. If anyone has colleagues who are interested in joining our chapter, please let Kathy know, and we will contact them.

We'd like to offer a warm welcome to our new members listed on page 7.

by Erich Foeckler, CFRE,  
 AFP, VP Membership

## EMAIL NOTICES



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

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## 2004 PROFESSIONAL DEVELOPMENT CONFERENCE (PDC)

June 3, 2004 - 8:00 - 4:30 PM

Following Your Compass: Pointing Your Organization toward Fundraising Success

**DON'T MISS THIS CONFERENCE!** Is your organization struggling to meet its financial needs? Are you looking for a new route to fundraising success? Does your fundraising career need a little direction?

If you answered yes to any of these questions, then you can't afford to miss the AFP San Diego Chapter 2004 Professional Development Conference! "Following Your Compass" promises an outstanding day of training, resource-gathering and networking with other non-profit professionals, volunteers, and Board members.

Our journey around the compass begins with a keynote address from Dr. Doug Lawson, author of GIVE TO LIVE: How Giving Can Change Your Life, and one of the most popular speakers at the annual AFP International Conference.

Seven break-out seminars featuring speakers from across the country will help point conference participants in the right direction, including:

- Utilizing Board, Staff and Volunteers to Raise Funds for Your Organization: Thomas W. Mesaros, CEO – The Alford Group, Seattle, WA
- Integrating the Internet into Your Annual Fund: Steve Rusk, Vice President – The Russ Reid Co., Pasadena, CA
- Strategic Planning for Development: Rev. John Hughes, Executive Director – METRO United Urban Ministry, and Faculty – USD Nonprofit Leadership and Management Program
- New Proven Ways to Raise Major Gifts: Dr. Doug Lawson, Founder – Douglas M. Lawson Associates, Inc., New York, NY
- Ensuring a Successful Capital Campaign: Carol Numrich, Fundraising Consultant, Los Angeles, CA
- Tools and Tips for Creating Unique and Successful Special Events: Laurel McFarlane, San Diego, CA
- Planned Giving: When That's Not All You Do, Alan Knobloch, CFRE – Phoenix, AZ

As if the above isn't enough to help you find your way in the challenging world of non-profit development, we are pleased to

announce that Paulette Maehara, President & CEO of the Association of Fundraising Professionals will be our luncheon speaker! Ms. Maehara will guide us through Current Trends in Philanthropy.

Also assisting your search for direction will be an exhibit hall packed with vendors offering a variety of resources to help ensure your organization's success. To make the exhibit hall fun as well as educational, we're organizing the first annual "Scavenger Hunt" complete with raffle prizes for those who visit each vendor!

How much does all this life-altering training cost? Only \$150! Register online today at [www.afpsd.org](http://www.afpsd.org). Don't delay – space is limited to 300 registrants, and after May 26th the price goes up to \$175. See conference details on page 8 and 9.

by Linda Spuck, PDC Chair

### Announcing the Advanced Professional Workshop!

In addition to all the other sessions at PDC, a very special half-day workshop is being offered for fundraisers with 8 or more years of experience. Rita Wasmuth, Senior Major Gifts Officer/National Initiative - American Red Cross, will offer a session entitled Taking Charge of Your Career. Following her presentation, a panel of San Diego's most successful fundraisers will share their experiences in securing mega-gifts. The panel includes: Blair Blum, President, San Diego Hospice Foundation, Bill Littlejohn, Senior Vice President, CEO, Sharp HealthCare Foundation, James Langley, UCSD, and Art Stillwell, Effective Consulting, Principal and former Project Director of The Salvation Army Ray and Joan Kroc Community Center.



## THE BENEFITS OF ATTAINING YOUR CFRE

What do ten percent of AFP members have in common? They are Certified Fundraising Executives (CFRE). Have you given any thought to joining this group? Today there are over 4,200 CFREs, of which over 2,600 are associated with AFP. The CFRE credential is designed for practitioners with at least five years of experience. To become a CFRE requires completion of an application documenting Education, Professional Practice, Performance, and Service. There is a \$385 application fee for AFP members.

Acceptance of the application allows you to sit for the CFRE examination, a 225 item multiple-choice examination, which tests your knowledge of fundraising theory and practice. Passing the exam entitles you to the designation CFRE, which you retain for three years. Names of new CFREs are posted on the CFRE web site ([www.cfre.org](http://www.cfre.org)). To retain the credential, CFREs are required to recertify every three years.

CFRE International, located in Alexandria, Va., administers the Certified Fundraising Executive credential. A thirteen-member board oversees the CFRE Program. The program is supported by thirteen participating organizations in the US, Canada, England, and Australia. CFRE certification is the only internationally recognized baseline credential for fundraising executives.

Why become a CFRE? Attaining the CFRE credential attests to your knowledge, skills, and achievements as a fundraising professional. It demonstrates to your peers, your employer, your donors, and the public your commitment to professional standards and the betterment of the profession. Becoming a CFRE may positively impact your bottom line. In the two most recent AFP Surveys of Compensation and Benefits, salaries reported by CFREs were higher than the average for all professionals responding to the survey questionnaire.

The CFRE credential was created in 1997 when the Association for Healthcare Philanthropy (AHP) and AFP merged their baseline credentialing programs. Through December 2000, the program operated under a separate Board as a component of AFP. In December of that year, the CFRE Program independently incorporated as CFRE International, and in October 2001, the Program staff relocated to its own offices in Alexandria.

Additional information on the CFRE credential is found on the

CFRE International website. Application forms can be downloaded in a number of formats. Even if you are new to the fundraising profession, it is never too early to begin thinking about obtaining the CFRE credential. It is suggested that you download an application now and begin to document your continuing education, professional, and volunteer activities. Then you will have an easy job of completing the application process when the time comes to file.

### Advanced Certified Fundraising Executive (ACFRE)

For those senior professionals who hold the CFRE credential and have recertified at least once, there is the ACFRE credential. To date, 66 individuals have attained this credential, the highest professional designation within AFP.

The ACFRE process begins with an application like the CFRE process. Again, Education, Professional Practice, Performance, and Service are documented. This is followed by an examination, the assembling of a professional portfolio, and, finally, an oral examination. The process can take over a year to complete, and costs \$1,100. New ACFREs are honored at the annual AFP International Conference on Fundraising. The attainment of the ACFRE credential represents a major accomplishment in a professional fundraiser's career.

Like the CFRE Program, a separate board consisting of four ACFREs and a public member oversees the ACFRE. Unlike CFRE International, the ACFRE credential operates completely within the framework of AFP.

For more information, call Jette Engstrom at (800) 666-3863, ext. 472.

From the CFRE Update, October 11, 2002  
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## MENTORS, PLEASE APPLY HERE

Over the last year, Terri Rodgers and Brian Bowden did a great job of establishing a mentoring program for our chapter. They both worked hard on giving a rather nebulous program some structure. Now, with your help, it's time to improve and expand the program again.

First, I'd like to share a few thoughts on what mentorship is. Next, I'll dispel a few myths about mentorship. Finally, I'd like to encourage you to become involved with the program.

### What is Mentorship?

Mentorship is a one-on-one, non-judgmental relationship in which an individual voluntarily gives time to support and encourage another. Mentors may help their partners with various skills relating to fundraising; however, the core skills that transcend fundraising are even more important, including attitude, leadership, confidence, communications, discipline and goal-setting.

### Myths of Mentorship

- It will take too much time –  
We will only meet as a group a couple of times and with email and telephones your time commitment should be minimal.



- Taking time to be a mentor will decrease my productivity.

Mentoring improves your productivity – talking about goals and leadership will clarify and focus on your own projects.

- The associates are the only ones to benefit from mentoring.

I think you'll find mentoring to be one of the most gratifying and rewarding experiences of your professional career.

It takes more than experience to become a mentor.

Motivation, communication and personal goal setting are critical and will be enhanced for both parties.

We have three associates that are looking for a helping hand in realizing their full potential. Please consider becoming a mentor.

To learn more call Karen Amoroso at 858-410-4163 or email [kamoroso@skcc.org](mailto:kamoroso@skcc.org).

by Karen Amoroso, AFP, Mentorship Chair

## 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
- ✓ Professional Dev. 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





## GOVERNMENT RELATIONS UPDATE

A bill has been introduced in the California Senate (S.B. 1262, the Nonprofit Integrity Act) that would create numerous new requirements for charities and charitable fundraisers. A hearing on the bill has been scheduled for the Senate Judiciary Committee.

Under current California law, charities, fundraisers and fundraising counsel (individuals or corporations who manage or assist charities with campaigns but never have control of the funds raised) are required to register with the Attorney General.

S.B. 1262 does not change the general process of registration and regulation, but makes significant modifications to various aspects of registration and solicitation and creates additional requirements for charities, fundraisers and fundraising counsel.

- S.B. 1262 revises and creates additional disclosures that charities and fundraisers would have to make during a solicitation, whether written or oral.
- Charities may only accept contributions for a charitable purpose that is expressed in the solicitation and that conforms to the charitable purpose expressed in the organization's articles of incorporation.
- Charities that receive or accrue gross revenue of \$500,000 or more in any fiscal year must prepare annual financial statements that are audited by an independent certified public accountant and must appoint an audit committee.
- Commercial fundraisers and fundraising counsel must file a copy of a contract with a charity with the Attorney General's office at least ten days before performing any services for that charity.
- A person convicted of a felony or misdemeanor involving dishonesty or arising from the conduct of a charitable solicitation is prohibited from acting as a commercial fundraiser.
- Commercial fundraisers and fundraising counsel are prohibited from performing services for chari-

ties without first registering with the Attorney General's office.

- Commercial fundraisers must file a copy of their annual financial report with the sheriff's office of every county in which they will solicit funds during a particular campaign.
- All contracts for services between a charitable organization and a fundraising counsel or fundraiser must contain specified provisions, disclosure and cancellation policies. Under the bill, all contracts must include a ten-day termination period during which charities can opt-out of the contract at no cost.
- Fundraisers and fundraising counsel must keep records of all activities related to a charity and its solicitations for ten years.

Representatives from AFP International spoke with the Attorney General's office and provided comments on a draft bill before the official legislation was introduced. While some of AFP's recommendations were included in the bill, there are still serious concerns about aspects of the bill. AFP will be providing comments to the Senate Judiciary Committee and will have representatives at an April 20 hearing about the bill.

For more information, contact [paffairs@afpnet.org](mailto:paffairs@afpnet.org)

With regard to the CARE Act, negotiations and developments continuing to swirl around the Charity Aid, Recovery and Empowerment (CARE) Act, the Association of Several weeks ago, Sens. Joseph Lieberman (D-Conn.) and Rick Santorum (R-Pa.) filed the CARE Act as an amendment to the JOBS bill that was to be considered by the Senate. Consideration of that bill continues, but a vote on the CARE Act amendment has yet to be scheduled. Concurrently, both the House and Senate continue to look at related charity issues, such as vehicle donation programs and contributions of intellectual property.

(continued on page 7)



## CONGRATULATIONS TO OUR 2004 SCHOLARSHIP AWARDEES!



### Chamberlain Scholarship

Leane Marchese, ElderHelp of San Diego

### International Conference Scholarships

Alon Banks, Amor Ministries

Jay Hill, San Diego Public Library

Anne Ricci, We Deliver Dreams Foundation

Laurie Sanderson, Sidney Kimmel Cancer Center

### Professional Development Conference Subsidies

Christina Bolanos, Monarch School Project

Laura Brommelsiek, Mercy Hospital Foundation

Cheryl Brown, ArtsBusXpress

Laura Felicetty, San Diego Council on Literacy

Kim Knouse Volunteer San Diego

Kendra Lee, Sidney Kimmel Cancer Center

Erica Monjaraz, Nativity Prep Academy

Ileana Ovalle, Public Solutions-Aquatic  
Adventures Science Education Fdn.

Tina Pope, Palomar Pomerado Health Foundation

Yvette Porter Moore, The Walter J. Porter Education &  
Community Fdn.

Cynthia Roth, Girl Scouts San Diego-Imperial Council

Jennifer Williamson, Golden Care Workforce Institute

## WELCOME TO OUR NEW MEMBERS

(From Jan. 1 through April 30, 2004)

**Katherine Benedict**, The Humane Society of the U.W.

**Cheryl Brown**, ArtsBusXpress

**Vincent Camarda**, New Outlook Foundation

**Katy Capshaw**

**Patti Cramer**

**Christine Deardorff**, San Diego Symphony

**Henry DeVries**, Henry DeVries Communi-  
cations

**Terrence Dwyer**, La Jolla Playhouse

**Trasie Farfan**

**Laura Felicetty**, San Diego Council on Literacy

**Stacy Goodman**, Sharp HealthCare Foundation

**Cheryl Houk**

**Sally Laviolette**, San Pasqual Academy

**Paula Lemire**, Thomas Jefferson School of Law

**Lisa Marvin**, The Salk Institute for Biological Studies

**Ileana Ovalle**, Public Solutions-Aquatic Adventures Science  
Education Fdn.

**Malissa Patocka**, Community Options

**Yvette Porter Moore**, The Walter J. Porter Education & Com-  
munity Fdn.

**Charlene Pryor**, Salk Institute for Biological Studies

**Cynthia Roth**, Girl Scouts San Diego-Imperial Council

**Lolly Sangster**, City of Carlsbad

**Sarah Shepard**, ElderHelp of San Diego

**Lindsay Trowbridge**, Girl Scouts, San Diego-Imperial Coun-  
cil

**Linda Valliant**, Canine Companions for Independence

**Carol Widmer**



## GOVERNMENT RELATIONS UPDATE

(continued from page 6)

According to Kyle Button, CFRE, chair of AFP's U.S. Government Relations Committee, a letter campaign now might help break the legislative logjam. "On one hand, it's good to see Congress focusing on charities for once," Button explained. "On the other, it's quite possible that the CARE Act could lose momentum if it gets bogged down in all of these other discussions. And given that 2004 is an election year, that could easily happen, which is why we need to move now."

Stay tuned for more information on how you can help push the Act forward. For more info about the CARE Act, please visit the CARE Act section on AFP's website.

submitted by Alan Knobloch, CFRE,  
AFP Government Relations

## PROFESSIONAL OPPORTUNITIES ONLINE

Don't forget to check the website [www.afpsd.org](http://www.afpsd.org) for recent professional opportunities. New listings are added regularly. Many opportunities are currently listed but the most recent listings include:

- Fundraising Professional - posted 5/11/04
- Assistant to the VP, Development & Alumni - posted 5/11/04
- Development Director - posted 4/28/04



# San Diego Philanthropy

San Diego Chapter, Inc.

## PROFESSIONAL DEVELOPMENT CONFERENCE AGENDA, June 3, 2004

Thursday, June 3, 2004			
7:00 - 8:30 am	<b>Registration and Continental Breakfast</b>		
8:30 - 9:15 am	<b>Morning Keynote</b> - How Giving Can Change Lives Douglas M. Lawson, Ph.D.		
9:15 - 9:30 am	Morning Break		
9:30 - 10:45 am	<b>Session A1:</b> Utilizing Board and Senior Staff as Fundraisers Thomas W. Mesaros, CFRE	<b>Session B1:</b> Ensuring a Successful Capital Campaign Carol Numrich, CFRE	<b>Session C1 (Advanced Professionals Only):</b> Taking Charge of Your Career Rita K. Wasmuth, CFRE
10:45 - 11:00 am	Mid-Morning Break		
11:00 - 12:15 pm	<b>Session A2:</b> New Proven Ways to Raise Major Gifts Douglas M. Lawson, Ph.D.	<b>Session B2:</b> Tools and Tips for Creating Unique and Successful Special Events Laurel McFarlane	<b>Session C2 (Advanced Professionals Only):</b> Panel Discussion on "Mega-Gifts" (Art Stillwell, Bill Littlejohn & Blair Blum)
12:15 - 1:00 pm	<b>Buffet Luncheon</b>		
1:00 - 1:45 pm	<b>Luncheon Keynote:</b> Current Trends in Philanthropy, Paulette Maehara, CFRE, CAE CEO, Association of Fundraising Professionals (AFP) <b>Special Tribute</b> for Colette Murray, JD, CFRE, Chair AFP International (see below) San Diego Chapter member who will be honored for many years of faithful leadership.		
1:45 - 2:00 pm	<b>Afternoon Break</b>		
2:00 - 3:15 pm	<b>Session A3:</b> Integrating the Internet into Your Annual Fund Steven Rusk, CFRE	<b>Session B3:</b> Planned Giving: When That's Not All You Do (Speaker TBA)	<b>Session C3:</b> Strategic Planning for Fundraising Success Rev. John Hughes, MSW
3:15 - 4:30 pm	Scavenger Hunt - Meet Our Exhibitors		

*Special Tribute:* Colette M. Murray, JD, CFRE, is chair of the Association of Fundraising Professionals (AFP) and a member of the San Diego Chapter. She is president and CEO of Paschal•Murray, a specialized executive search firm, former Chief Executive Officer of the Sharp HealthCare Foundation and Corporate Vice President for Philanthropy and Community Development at Henry Ford Health System, Detroit. She is a past president of the San Diego Downtown Breakfast Rotary, Detroit AFP Chapter, and CASE; serves on the Executive Women's Council, University Club; and awarded Santa Cruz Soroptimist Woman of the Year and the Father Hesburgh Award, a national honor presented by CASE (Council for the Advance and Support of Education).

*Advanced Professional Sessions:* Please note: Our Sessions C1 and C2 have been planned just for those professionals with 8+ years in fundraising.



## PROFESSIONAL DEVELOPMENT CONFERENCE COURSE DESCRIPTIONS

**A1: Utilizing Board and Senior Staff as Fundraisers** by Thomas W. Mesaros, CFRE

Effective fundraising is a team effort, requiring the assistance of board members, volunteers, and senior staff. This seminar will provide tips on training and motivating key individuals in order to build a more successful fundraising program for your organization.

**A2: New Proven Ways to Raise Major Gifts** by Douglas Lawson

One of the most popular seminars at this year's AFP International conference! Lawson provides practical tips on ways to build relationships with donors and prospects in order to raise major gifts. The seminar will include the 7 secrets of successful major gift fundraising today.

**A3: Integrating the Internet into your Annual Fund** by Steven Rusk, CFRE

Internet use has exploded over the last 10 years, and online gifts have increased dramatically, yet many non-profits have yet to develop a targeted internet strategy for their fundraising programs. Learn about the value of a planned Internet communications program as part of your Annual Fund, and develop practical tools for harnessing the power of this growing medium.

**B1: Ensuring a Successful Capital Campaign** by Carol Numrich, CFRE

This seminar will help those organizations contemplating or actually planning a capital campaign. It will also help those who need to "jump start" their current campaign! Participants will learn that techniques for a successful campaign are the same whether the goal is \$500,000 or \$10 million!

**B2: Tools and Tips for Creating Unique and Successful Special Events** by Laurel McFarlane

Is it getting harder to raise the funds you need from your special events? We will cover three key topics to help make your events successful and memorable: 1) techniques for creating unique and memorable events, 2) the value of using outside resources and 3) ways to find free publicity for your event.

**B3: Planned Giving When That's Not All You Do** by Alan Knobloch, CFRE

A successful planned giving program is not just for non-profit institutions with large development offices! Learn how your organization - no matter what its size -- can obtain planned gifts by using a few easy-to-implement techniques. If technical details such as CRATS, CRUTS and CGA's are keeping your organization from benefitting from the largest wealth transfer in American history, then this seminar will show you how some simple steps can dramatically increase future gifts.

**C1: Taking Charge of Your Career** (Advanced Professionals Only) by Rita K. Wasmuth, CFRE

An exploration of designing your career and working to achieve your ambitions while living a life that suits you. We will explore the macro trends that affect our field, the necessity of managing the expectations of those we work with and report to, and the necessity of securing personal/balancing time in this demanding environment.

**C2: Panel Discussion on "Mega-Gifts"** (Advanced Professionals Only) by Art Stillwell, Bill Littlejohn, Colette Murray, JD, CFRE, and Blair Blum

San Diego has been capitulated into the philanthropic limelight due to the news of several recent "mega-gifts." Hear the personal stories and anecdotes from seasoned fund raising professionals representing institutions who benefited from multi-million dollar donations. Learn first-hand exactly how these mega-gifts came about and how to better prepare your organization to ensure readiness for a mega-gift of your own!

**C3: Strategic Planning for Fundraising Success** by Rev. John Hughes, MSW

The popular phrase "Failure to plan is planning to fail" couldn't be more relevant for non-profit fundraising. Without a strategic, practical plan of action, fundraisers are likely to spend their time reacting to institutional and donor crises, rather than building a sustainable program.

Today's non-profit organizations have become quite skilled at developing overall strategic plans which often do not "trickle down" to the development department.



# San Diego Philanthropy

San Diego Chapter, Inc.

## PROFESSIONAL DEVELOPMENT CONFERENCE REGISTRATION FORM (Secure registration also available online at [www.AFPsd.org](http://www.AFPsd.org))

Payment must be included with registration. Please indicate your choices:	San Diego AFP Member	Non Member
<input type="checkbox"/> <b>EARLY BIRD</b> (Paid by 5/26/04)	\$150	\$175
<input type="checkbox"/> <b>Conference</b> (Paid after 5/26/04)	\$175	\$200
<input type="checkbox"/> <b>GROUP Discount</b> \$25 discount 3rd thru 10th attendees from the same organization may qualify. ** (see instructions in box to right)	Take \$25 off the appropriate fee above.	

**\*\*GROUP DISCOUNT INSTRUCTIONS:**  
If two staff pay for the full conference, 3rd thru 10th staff from the same organization may attend the full conference for a \$25 discount off their registration fee. All attendees must register at the same time and attach their business card to each form. Please submit a form for each attendee, their business card, and the payment all at one time. Due to administrative costs, we cannot match names to previously registered attendees - all attendees must register at the same time and include business cards. Sorry, but consultants contracting with an organization do not qualify for this discount.

**CANCELLATIONS:** Refund, minus \$25 admin fee, if written notice received by 5/26/04.

Please circle which sessions you will attend.

**Conference Sessions:** (circle one session per time slot)

9:30 - 10:45 ..... A1 B1

11:00 - 12:15 ..... A2 B2

2:00 - 3:15 ..... A3 B3 C3

**Advanced Sessions:**  Enter # years in nonprofit field (8+ yrs. required for sessions C1 & C2).

9:30 - 10:45 ..... C1

11:00 - 12:15 ..... C2

### TO REGISTER

**1** Internet:  
[www.AFPsd.org](http://www.AFPsd.org)

**2** Fax w/ credit card:  
(888) 423-7237

**3** Mail:  
AFP San Diego  
POB 27148  
San Diego, CA 92198

Questions?  
Call Diane Prock  
(888) 323-7237

Attendance limited to  
330 - register early!

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

AFP Member No. \_\_\_\_\_ Phone No. \_\_\_\_\_

Email: \_\_\_\_\_

Confirmations will be sent to your email address by 5/26/04. If you do not receive one by then, please contact us immediately.

Organization: \_\_\_\_\_

Street Address: \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Credit card #: \_\_\_\_\_ Exp. Date \_\_\_\_\_

Signature: \_\_\_\_\_

**Payment must be included with form. Registration processed on a first-come, first-served PAID basis. TAX ID: 33-005-0791**



# San Diego Philanthropy

San Diego Chapter, Inc.

## THANKS TO OUR PROFESSIONAL DEVELOPMENT CONFERENCE SPONSORS AND EXHIBITORS

### MEET OUR SPONSORS



### MEET OUR EXHIBITORS

