

V O I C E



News of the Long Island Chapter of the Association of Fundraising Professionals

The Association of Fundraising Professionals (AFP), which represents more than 30,000 members in 197 chapters throughout the world, advances philanthropy through advocacy, research, education and certification programs. AFP fosters the professional development of fundraising professionals and promotes ethical standards in the fundraising profession.

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AFPLI Reaches Out

by Mary Garrote, Co-chair, AFPLI Diversity Committee

AFPLI's Diversity Committee held its premiere "Networking Social" on June 11th. A good time was had by all who attended; the conversation, networking, and raffle prize added up to a winning combination for fun! The location, along with the appetizers, was graciously donated compliments of Mr. Frank Cammarata, General Manager of Ciao Baby Restaurant and Lounge on Sunrise Highway, Massapequa Park. Thanks again for your hospitality, Frank, from all the members of AFPLI's Diversity Committee and the Board of Directors!

This event was the first of its kind for AFPLI, as they welcomed experienced, as well as, inexpe-

rienced fundraisers, career-changers, and individuals new to the non-profit industry. It was an opportunity for over 60 attendees to learn the variety of services and educational opportunities AFPLI has to offer it members. Informal conversations regarding AFPLI's educational workshops, mentoring, scholarship, monthly job postings, and certification opportunities in the fundraising field were discussed.

Patrice Frank, Board President individually greeted all who attended. Mary Garrote and Kathy Brand, Diversity Co-Chairs and AFPLI Board Members, along with the members of the Diversity Committee and Board, were on hand to

answer questions and welcome our visitors.

Please visit our website at www.afpli.org for details on our next AFPLI networking event scheduled for October.



Patrice Frank, Kathy Brand, and Mary Garrote

AFPLI MONTHLY PROFESSIONAL DEVELOPMENT BREAKFAST MEETING

\$300 SPONSORSHIP

Exclusive sponsorship of individual monthly will provide you with the following visibility:

- Your company name on meeting announcement flyer mailing to AFPLI membership
- Your company name on AFPLI C-event email invitation to AFPLI membership
- Your company name/logo on AFPLI website for your sponsorship month, with link to your website
- Two tickets to professional breakfast meeting
- Your company banner displayed at meeting
- Display table for your company materials
- Opportunity to address meeting attendees (approximately 2 minutes)

2009 Chapter Board

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Patrice Frank
*Usdan Center for the Creative
and Performing Arts*

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The Cenacle Sisters

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Family Service League

Mary Garrote
Girl Scouts of Suffolk County

Marsha Gittleman
UCP of Greater Suffolk

Alan Kelly
Hofstra University

Charles D. Kimpel, CFRE
Philanthropic Consulting Service

Nancy Mariano
Friends of Karen, Inc.

James E. Meyer
Greco Planning, Inc.

Paule Pachter
Long Island Cares

Lester Scheinfeld
Habitat for Humanity – Suffolk

Robert Taylor
Lambrides, Lamos, Taylor LLP

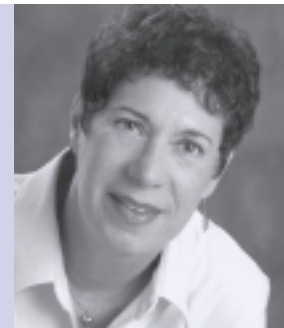
Barbara Travis
*National Multiple Sclerosis
Society – LI Chapter*

Judith Lach Veeck
*Cornell Cooperative Extension
– Suffolk County*

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A Message from the President

by Patrice Frank
*Director of Development,
Usdan Center for the Creative and Performing Arts*



Dear Friends and Colleagues,

Consumer confidence is improving. The housing market is improving. The economy is improving. Does this mean we are out of the woods and the challenges of this recession are gone? No, but I am so pleased to finally be able to say there are glimmers of light on the horizon and we need to be poised and ready to address our new normal.

Through education, networking and collegiality, AFPLI will help you respond to the demands of what is likely to be a more cautious and conservative — certainly a different — philanthropic environment.

Our Education Committee and Philanthropy Day Committee, always on the forefront of knowing what is of current interest, will identify critical issues with which we must become familiar. They will seek and invite experts to provide us with tools and information to help us with the new challenges of fundraising. You need merely to attend our educational events or even better, join one of the committees and help shape our upcoming programs.

Collegiality is defined as “shared power and authority vested among colleagues”. I am proud that our chapter exemplifies that definition. If you are new to the profession, you can be comfortable to call upon the most senior AFPLI professional for advice, instruction and support. If you don’t know a member who has the expertise that you need, you can be comfortable to call the office and be directed to the right person. We are all partners in the business of raising money and have a vested interest in enhancing each other and the profession.

Our networking should not be limited to other fundraisers. It is important to develop collegial relationships with our funders as well — especially now when neither they nor we can take anything for granted. Pick up the phone, invite them for coffee, share what is happening in your agency even if it is not exactly what you want them to hear. They, too, are our partners in the business of raising money and have already made an investment in the future of your agency.

Our events are educational and also an opportunity to network with our colleagues, prospective funders and vendors. There is nothing more conducive to beginning a positive relationship and subsequent friendship than nibbling on a bagel or sipping a glass of wine together talking about the things we have in common. We are all stewards of this not-for-profit community and together we will make it better.

Summer is a busy time for us. I hope it is also a successful time for you.

Sincerely,

Patrice Frank

Editor

Judi Veeck

Graphic Designer

Ellen Fleury

**“There is nothing wrong with you that reincarnation won’t cure.”
Jack E. Leonard**

I love the above quote as so many of us have had to reinvent ourselves during our careers. Certainly in these economic times, having some flexibility and a willingness to learn new skill sets is paramount for success. As I jump on my favorite band wagon of Planned Giving, even if you are not full time in the Planned Giving arena, there are skills you can learn which will help you to be successful in your fundraising efforts. To that end, I look at the recent estimates by the Federal Reserve which suggests that there is over \$3 trillion in IRAs and over \$12 trillion in cumulative qualified plans. This is often referred to as the inter-generational wealth transfer. Obviously the numbers are lower than they were three to five years ago, but they are still significant and beg the question — *Why aren’t fundraisers focused on developing gifts from these IRA and qualified plan accounts?* The answer is usually a lack of understanding of the techniques found within gift planning which would open up a donor(s) to the idea of giving from their IRA and/or qualified plan. Remember there are techniques which will help a charity, lower income and/or estate taxes, and further leave more for the heirs.

Recently, there was a less than favorable article about Charitable Gift Annuities in the Wall Street Journal which was titled “Donors Find Gift Annuities Can Stop Giving.” Many from the fundraising community responded to the article expressing great displeasure and offering factual information which would help show that the authors greatly overstated the risk. I am paraphrasing a few of Frank Minton’s comments, but simply put, the authors missed an opportunity for a fair and balanced report on Charitable Gift Annuities. The authors used as examples two mid-western charities which are not at all typical of the bulk of national charities and indeed one of them is suspected of not even being a charity. The three most cogent points were:

- There was no distinction between risks to the charity versus risk to the donor, meaning even if the pool of funds exhausts itself, the charity’s general accounts may pay the donor.
- A non factual statement that as many as 8 out of 10 accounts are under water. Please be aware that the states require additional funds be placed in reserve accounts when funds dip below required levels.



* Yes, some charities do reinsure all or a portion of their annuities, but that is usually a good thing as they work with highly rated companies.

If anyone needs a copy of the original article or the full response from Frank Minton just contact me. The American Council on Gift Annuities (ACGA) did not change rates of returns for CGAs at their June 18th, 2009 meeting. The last point on this topic is that there are also two responses, one by Conrad Teitel, ACGA, and the other by the Partnership for Philanthropic Planning which articulate the faults with the Wall Street Journal article and if anyone wants copies of the articles just contact me.

I recently worked on an estate plan with an individual who had a sizeable net worth. The one concern he had was to be assured of total transparency in dealing with him. Bad news, good news, whatever — he wanted to know. I was struck by his statement as I always try to be completely open in my dealings and of course realized how important total transparency is in gift planning. I have often said to fundraisers to “sell the sizzle of planned gifts but leave selling the steak to experts.” The reason is specifically so that the donor has all the answers they need and that the answers are factual.



James E. Meyer is Partner,
Greco Planning Group, Inc.

New Members

Corinne Albertina

AHRC Suffolk
2900 Veterans Memorial Hwy.
Bohemia, NY 11716

Christopher Banks

Brookhaven Memorial Hospital
Medical Center
101 Hospital Road
Patchogue, NY 11772

Patrick Berlinquette

United Cerebral Palsy of Nassau
380 Washington Ave.
Roosevelt, NY 11575

Idalia Boczek

141 Southdown Road
Huntington, NY 11743-2544

Dominique Cendales**Regina Gorney**

Molloy College
1000 Hempstead Ave
P O Box 5002
Rockville Centre, NY 11571-5002

Marilyn Grande

72 Ostend Avenue
Island Park, NY 11558

Karen Harris

100 Sunset Blvd.
Massapequa, NY 11758

Brenda Litzsky

ClearVision Optical
425 Rabro Drive
Suite 2
Hauppauge, NY 11788

Myrna Memoli

30 Anchorage Road
Port Washington NY 11050

Krista Miller

The Stony Brook School
1 Chapman Parkway
Stony Brook, NY 11790

Amy Pilott

15 Neil Court
Oceanside, NY 11572

Robert Raylman

Gift of Life International, Inc.
475 Northern Blvd.
Great Neck, NY 11021

George Rehn

286 Main Street
East Setauket, NY 11733-2815

Mary Scanio

Molloy College
1000 Hempstead Ave.
P O Box 5002
Rockville Centre, NY 11571

Michelle Serrado

AHRC Suffolk
2900 Veterans Memorial Hwy.
Bohemia, NY 11716

Karen Signoracci Suero

Karen Signoracci Suero, Ltd.
311 Latham Road
Mineola, NY 11501

Mindy Ferrentino Wolfile

Neptune Marketing LLC
P O Box 1166
Long Beach, NY 11561

Please register in advance for monthly meetings!

Now, More Than Ever: Philanthropy Day 2009

by Fran Karliner, Philanthropy Day Chair

If it's summer, then can Philanthropy Day 2009 be far behind? Not according to the Philanthropy Day Committee that has been planning, arranging and scheduling all the activities that make up this Long Island-wide event!

Scheduled for Friday, November 20th at the Long Island Marriott in Uniondale, this day-long conference will bring together more than 600 fundraisers, volunteers, executive directors, board members, and corporate and community partners. It will provide opportunities for you to learn new concepts from the experts, reinforce skills, observe new trends, network with colleagues, meet or get reacquainted with vendors, and honor those who have demonstrated their commitment to philanthropy. It will be a day devoted to "Good People, Good Causes."

Educational tracks, which will run throughout the day, will include workshops for those new to the development field as well as workshops geared for the senior level professional. And, brand-new this year will be an innovative session titled, "The Ask, The Gift and The Why," a real world version of the major gifts process. This friendly competition offers participants the opportunity to secure a "major gift" contribution (\$3,000 to the winning presentation and \$1,000 each to two runners-up) for their organization. Of course, more detailed information about this and all the other workshops and the day's activities are available on www.philanthropyday.org, as well as the registration brochure that will be in the mail to you right after Labor Day.

(CONTINUED ON NEXT PAGE)

Alan J. Kelly



“Remember your role as a fundraiser and always keep your eye on the ball (‘funding’).”

JOB TITLE: *Vice President for Development and Alumni Affairs, Hofstra University*

HOW LONG AT PRESENT POSITION? *4 years*

PREVIOUS POSITION: *Operational Vice President, CCS Co. Inc., 9 years*

EDUCATIONAL DEGREES/PROFESSIONAL CERTIFICATES:

BA, University of Scranton, 1996

MOST MEMORABLE MENTOR: *Brian Nevins – Senior Vice President and Managing Director, CCS Co. Inc. – Worked with Brian for four years+ in Boston on multiple projects*

MOST INTERESTING FUNDRAISING EXPERIENCE: *Navigating this recession; Serving as Executive Director of the Archdiocese of Boston’s \$300 million capital campaign during a very trying time (2001-2003); Being involved in Medical School start up.*

MOST MEMORABLE FUNDRAISING DISASTER (OR MOST EMBARRASSING MOMENT): *no comment!*

BEST ADVICE: *Enjoy and respect this profession – Development professionals are responsible for raising billions of dollars annually for incredible initiatives. Remember your role as a fundraiser and always keep your eye on the ball (‘funding’).*

(CONTINUED FROM PREVIOUS PAGE)

Philanthropy Day also provides the opportunity to recognize and honor those who have demonstrated outstanding philanthropic achievements. After careful deliberations by the Awards Committee, led by this year’s Chair, Pat Chambers Daly, AFPLI will honor, at the Awards Luncheon, these deserving and committed community leaders:

- Outstanding Fundraising Executive: **Jaclynne M. Jacobs**
- Outstanding Fundraising Volunteer: **Mindy Alpert**
- The Horace Hagedorn Outstanding Philanthropist Award: **Robert Donno**
- Outstanding Corporation: **CA, Inc.**
- Gilbert Tilles Award: **James E. Meyer**
- Leaders of Tomorrow: **Sean, Ryan & Kyle Haber**

The day begins early with check-in starting at 7:00 a.m. An orientation session is provided for first-time attendees and is followed with a Keynote Address. This year’s speaker is Robbe Healy, ACFRE, Chair of the Executive Committee of AFP International. In addition, you will also have the opportunity to schedule individual sessions in career development and mentoring.

With the economic turmoil that we find ourselves in the midst of and its effects on the not-for-profit sector; as we find ourselves needing to do more with less; as we listen to and hear about the “changing landscape of philanthropy”; this year, *more than ever*, Philanthropy Day will provide you with the information, education and resources to help you grow as a professional and increase and strengthen your expertise.

Save the date now...Friday, November 20th...Uniondale Marriott...see you there!

Direct Mail is Still Alive and Kicking

by James R. Rennert, CFRE, AFPLI Immediate Past President

Contrary to what you may have heard, direct mail fundraising is not dead. Sure you are raising money through some tried and true methods such as major and planned gifts, grants, and special events. And sure, you are now trying to raise money on your website and through social networking — all fine and good. But don't forget about raising money through the mail. Direct Mail fundraising is still a highly effective way to raise funds.

Here's a refresher course on the basics of direct mail fundraising.

Elements of a Direct Mail Appeal Package

- Mailing List
- Carrier Envelope
- Letter
- Enclosure
- Reply Device
- Reply Envelope

Use the following tips to ensure a good response:

- Use white or buff paper
- Use black or blue ink
- Short paragraphs only; two or three sentences
- Ask and ask again; in the body of the letter and in the P.S.
- Tell a story about one constituent; a compelling story about one constituent gets the best response
- Get an emotional response; you want the donor to become emotionally involved in the story
- Signed by one person; preferably the top dog or a constituent
- Tone; one person writing to an old friend
- Limit underlining and boldface; these tactics are now outdated
- Opening paragraph needs to be compelling and make the reader read on: "Mary walked into the shelter looking like she had been run over by a freight train. She was dirty, her clothes were torn, her eyes were red, and her hair was a tangled mess."
- Why do we matter — the case for support; make the case that yours is the organization that can solve the problem
- Reply Envelope should be a Courtesy Reply Envelope (CRE) which requires the donor to affix a stamp. A Business Reply Envelopes (BRE) is not as effective because it already has postage—making the donor think you have enough money to cover such a cost.
- Carrier Envelope should be a simple #10 with no teaser copy. Crazy shapes and teaser copy are also outdated and tip the donor off that this is a fundraising letter.
- Include mission statement; always include this somewhere in the package
- Personalization; if your database has the software capability, personalize your letters with the actual name of the donor, not "Dear Friend."

Renewing Existing Donors

- Try to get them to upgrade; ask for a larger gift this time
- Thank them for previous gift
- Monthly giving program; ask the donor to give monthly automatically through their checking account or credit card
- Use these tools for evaluation: Recency; when was the last gift? Frequency; how often do they give? Amount; how much do they give?

Acquiring New Donors

- When renting lists you can expect a 1-3% response rate
- You'll be lucky to break even
- Add these new donors to your in-house list
- List selection; select lists that whose subscribers are compatible with your donor profile

Acknowledgements

- Acknowledge within 48 hours
- Acknowledge every gift no matter the size
- Phone calls and notes to major gift donors

Evaluation

Use this 9-Point Performance Index* to evaluate the effectiveness of your program:

Basic Data Required

Number of donors = Number of donors responding with gifts
Gross revenue = Gross contributions
Expenses = Fundraising costs

Performance Measurements

Percent participation = Divide participants by total solicitations
Average gift size = Divide income received by participants
Net income = Subtract expenses from income received
Average cost per gift = Divide expenses by participants
Fundraising cost = Divide expenses by income received
Return on expense = Divide net income by expenses; multiply by 100 for percentage

* *Fund Raising—Evaluating and Managing the Fund Development Process*, James M. Greenfield, ACFRE, FAHP, 1999 John Wiley & Sons



James R. Rennert, CFRE is Province Director of Development, The Cenacle Sisters

An Open Letter to all AFPLI Chapter Members



Dear Fellow Member,

It's that time when we, once again, ask every member of AFPLI to consider helping others as well as to benefit themselves. Yes, the Every Member Campaign is upon us, and we need your support.

Here's why it is important and how YOU can benefit.

The National picture: YOUR support funds initiatives that

- benefit the entire membership
- increase accessibility to educational opportunities
- conduct innovative research that helps YOU do a better job
- help influence public and institutional opinion of fundraising.

The Local picture:

- When we reach our Chapter goal we will receive back 25% of what we raise.
- Most of that money provides scholarships and tuition reimbursement for Chapter sponsored or approved programs such as those offered through the Fundraising Certificate program at Molloy College.

Last year our Chapter was able to provide:

- 6 memberships in AFP
- 27 Philanthropy Day scholarships
- 9 course scholarships at Molloy
- total allocations for 2008 were \$10,105, all of which went to Chapter members.
- 1 complete Advanced Course scholarship
- 1 Chamberlain Scholarship to the International Conference
- \$2,650 in tuition reimbursement

So when you are asked to give, don't forget **there are direct benefits available to YOU.**

Our campaign began with the Chapter Board, and I am delighted to report that every Board member has made a gift or pledge with the average being nearly \$150.

You will receive a call from a representative of Rufolo-Cody a firm that is providing pro bono service to AFP International to help with the EMC. The phone campaign is scheduled to begin in mid July. You will receive an email prior to the call, so please be prepared to respond as generously as you can.

We offer recognition for every gift, by including donors' names on the Scroll of Honor which is distributed and displayed at Philanthropy Day. There are numerous levels of recognition, starting with gifts up to \$50, all the way up to our \$1,000 donors.

Think of it this way: We ask you to **give what you can** so you can ask us to **give you what you need.**

Please join me in supporting this important effort of the AFP Foundation for Philanthropy, which is geared to enhancing your career and advancing fundraising performance worldwide.

Sincerely,

Charlie

Charles D. Kimpel, CFRE
Foundation Development Chair
Long Island Chapter, AFP

Calendar

AUGUST						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

SEPTEMBER						
S	M	T	W	T	F	S
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5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

OCTOBER						
S	M	T	W	T	F	S
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4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

August

14
8:30 AM Philanthropy Day Meeting

19
6:30 PM Your Career in Development & Fundraising Course

September

11
8:00 AM AFPLI Board Meeting

17
6:30 PM "The Art & Science of Acquiring Major Gifts" course begins

22
8:00 AM Professional Education Meeting "Campaigns – How-To and When-To"

22
6:30 AM "The Business of Raising Money for the Non-Profit Sector" course begins

25
8:30 AM Philanthropy Day Meeting

October

2
8:00 AM AFPLI Board Meeting

20
8:00 AM Professional Education Meeting "Recruitment, Retention & Moving Ahead in Your Career"

30
4:00 PM Philanthropy Day Meeting



For further information and reservations please call the AFPLI office 631/249-5008.

Due to rising costs, the reservation and cancellation policies for monthly educational meetings will be strictly enforced. Cancellations received after the cut-off date cannot be credited or carried over. If you make a reservation and don't show, you will be billed, since guarantees to the hotel must be met. Please help us maintain monthly meeting costs.

AFPLI

VOICE

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Long Island Chapter
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