



PhilanTopics

Association of Fundraising Professionals

February 2010

Board of Directors

PRESIDENT

Mark Roberts, CFRE 309-674-8730

PRESIDENT-ELECT

Kristen Berchtold 309-688-8671

PAST PRESIDENT/GOVERNANCE

April Gould, CFRE 309-655-1653

TREASURER

Michael J. Maginn 309-671-2144

TREASURER

BreeAnn Hohulin 309-694-5578

SECRETARY

Beth Gilbert 309-692-7631

MEMBERSHIP SERVICES

Robin Ballard 309-694-8511

PROFESSIONAL ADVANCEMENT

Open Position

EXTERNAL AFFAIRS

Rich Draeger, CFRE 309-655-1348

NEWSLETTER EDITOR

Kimberly Weeks, CFRE 309-688-8671

EVERY MEMBER CAMPAIGN

Nicole Campen
nicolep42@comcast.net

GOVERNMENT RELATIONS

Roger Meyer, CFRE 309-655-4874

DIVERSITY

Vikki Baptiste 309-829-0691

DIRECTORS

Jeff Parmenter 309-637-1771

Shelly Smith, CFRE 309-677-3091

Dennis Steele 309-693-8291

Julie Witte 309-686-1177

NEWSLETTER QUESTIONS?

Kimberly Weeks, CFRE 309-688-8671
kweeks@girlscouts-gsci.org

MEETING RESERVATIONS?

Beth Gilbert 309-692-7631
bgilbert@peoriaymca.org

ADDRESS/CONTACT CHANGES?

Heather Wolbeck
hjwolbeck@sbcglobal.net

Trends in Philanthropy for 2010

Presented by Rebecca Hunter, CFRE

Even though Rebecca Hunter, CFRE, owns a real crystal ball, **no one** knows for certain what philanthropy will look like in this new decade. One thing **IS** for sure: if we plan the work and work the plan, we'll do the best we possibly can on behalf of our organizations.

That said, Rebecca will scour the philanthropic world in advance of her Wednesday, February 10, 2010, interactive presentation, and promises to share with the Central Illinois Chapter of AFP the latest information she can find.

What good will that do, you may ask?

Knowledge is power. You, as a professional involved in raising money for a nonprofit organization, need to be well-armed with facts, statistics and expert opinions so that you can help your board, volunteers, supervisor and colleagues to better understand the new reality in the world of giving.

In the meantime, here are several of Rebecca's truisms to fend off the madding hordes:

- *Actions made in fear are almost always destructive.*
- *In crisis comes opportunity.*
- *Treat donors right, regardless of anything!*
- *Worrying is not thinking; complaining is not action.*

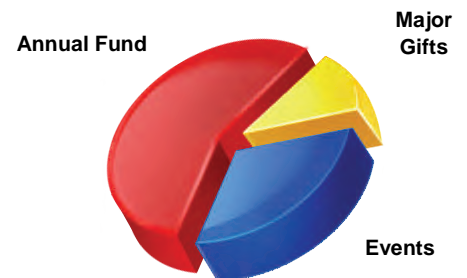
Finally:

- *Worrying is not a fundraising strategy (compliments of Campbell & Company, Inc.).*

Rebecca is currently the chief development officer for the Cancer Wellness Center in Northbrook, Illinois. She has been a CFRE since 1991 and was designated as a Master Teacher by AFP and the Indiana University Center on Philanthropy in 2000. This year, she was elected to the Board of the Chicago Chapter of AFP and is chairing its Review Course Committee, in addition to

servicing as a mentor. Rebecca has been an adjunct faculty member of North Park University's master's degree and certificate programs in nonprofit management. In former lives, she has been the founding executive director of the Foundation of the American Thoracic Society and the Pana Community Hospital Foundation. A veteran of 17 capital and major gift campaigns, she cut her teeth in fundraising at Washington University in St. Louis and led the first-ever capital campaign at Southern Illinois University Carbondale for its College of Business in 1989 – which launched on the date of the stock market's worst crash in history.

With an undergraduate degree in journalism and a master's degree in organizational communication & leadership dynamics, Rebecca's one and only career has been in attracting philanthropy to worthy organizations as a professional since 1981 and volunteer since 1972.



The February 10 AFP Chapter meeting will be held at the Best Western Ashland House located at 201 E. Ashland Street in Morton. The cost is \$15 for AFP members and \$20 for guests. Registration begins at 11:30 a.m., lunch at 11:45 a.m. and the program begins promptly at noon.

Directions From Bloomington: Take I-74 West towards Peoria. Then take Exit 102 and proceed for half a block. Take the first right at the stoplight. The Ashland House is on the left side just past the Cracker Barrel Restaurant.

Reservations: To RSVP, contact Beth Gilbert at peoriaymca.org. Reservations are due by February 5. A registration form is



Please contact Kimberly Weeks at kweeks@girlscouts-gsci.org if you no longer wish to subscribe to this newsletter.

Estate Tax Retroactivity?

Legislative update on Estate Taxes as reported by Crescendo.

Prior to leaving Washington in December, the House of Representatives passed an estate tax freeze. The House plan would freeze the estate exemption at \$3.5 million and the estate tax rate at 45%. However, the Senate was unable to come to a compromise. By December, the Democratic proposal was to accept the House estate tax freeze, while the Republicans generally were supporting an exemption of \$5 million and an estate tax rate of 35%.

If Congress does not act during 2010, then the estate and generation skipping transfer tax will be repealed for 2010 and will be restored on January 1, 2011. At that time there will be a \$1 million estate exemption (as indexed for inflation) and a 55% estate rate. Speculation among the estate planning bar now centers on whether the Senate will be able to pass an estate tax bill during 2010 and whether that bill will be retroactive.

It appears to be difficult for the Senate to act quickly on estate taxes. While Senate Finance Chair Max Baucus (D-MT) has indicated that he would like to proceed, the rules of the Senate and politics of an election year make progress very difficult. Under the Senate rules, passing a controversial bill requires 60 votes. While there are 60 Democratic Senators, several are facing difficult elections and are not willing to vote for a freeze, or perhaps even a compromise. If a Senator facing a difficult re-election campaign votes for a freeze or compromise, his or her opponent will be likely to advocate repeal of the tax and gain votes.

In election years, the Senate normally acts by June. During the fall, those Senators who are running in competitive races are very reluctant to face controversial issues. For this reason, it is quite possible that the Senate will miss the May-June window for legislation and will then need to address the estate tax issue in a "lame duck" session. Therefore, the estate tax compromise legislation may not be completed until December 2010.

If legislation is deferred until late in 2010, will it be constitutional? The lead case approving retroactive taxation is *United States v. Carlton*, 512 U.S. 26 (1994). Mr. Carlton was the executor for Mrs. Day, who was an heiress from the Keck family. Carlton discovered that the Sec. 2057 estate tax deduction for half of the sale value of securities to an ESOP did not require ownership on date of death. He purchased MCI shares for \$10.7 million and sold them to the MCI ESOP. Carlton then claimed an estate deduction of \$5.3 million.

Congress recognized the obvious problem in the law and amended Sec. 2057 retroactively to close that loophole.

On an appeal to the Supreme Court, the retroactive tax legislation was upheld. The court determined that retroactive tax legislation can be "rationally related to a legitimate legislative interest." The retroactive tax legislation is permissible if it is enacted to correct an error or mistake in tax code, there is a reasonably short time and there is notice or reasonable expectation on the part of the taxpayer that the change could be made.

Trends in Philanthropy for 2010

Presented by Rebecca Hunter, CFRE

**Wednesday, February 10 - Best Western Ashland House, Morton
 Registration at 11:30 a.m., Lunch at 11:45 a.m., Program 12:00 p.m.**

Name: _____ Organization: _____
 Address: _____ City/State/Zip: _____
 Phone: _____ E-Mail: _____

\$15 per AFP member \$20 per guest Amount Enclosed \$ _____

To make your reservations for the February meeting, contact Beth Gilbert at bgilbert@peoriaymca.org.

Please send this form with a check marked "February" payable to: **AFP Central Illinois Chapter**

Central Illinois AFP, P.O. Box 5323, Peoria, IL 61601

RESERVATIONS ARE DUE BY February 5.



**VICE PRESIDENT FOR UNIVERSITY ADVANCEMENT and Executive Director of
Illinois State University Foundation**

Illinois State University invites nominations and applications for the position of Vice President for University Advancement.

Illinois State is a campus of almost 21,000 students. Founded in 1857, Illinois State is a coeducational, residential university that emphasizes undergraduate study. Its 34 academic departments in 6 colleges offer 63 undergraduate programs in more than 160 fields of study. The Graduate School coordinates 38 master's, 2 specialists, and 7 doctoral programs.

Illinois State University is located in the twin-city community of Bloomington-Normal, with a population of approximately 125,000 and is within easy driving distance of the financial and business centers in Chicago, St. Louis and Indianapolis. *Expansion Management Magazine* rated Bloomington-Normal as one of 72 metro areas with a five star quality of life, giving the community high rankings in such areas as standard of living, quality of schools and traffic and commute. In their most current rankings, *Forbes* ranked Bloomington-Normal as No. 20th in its list of the Smartest Cities in America.

The Vice President is the chief development officer of Illinois State University, responsible for building and leading a professional staff in managing all fund-raising activities for the University including the annual fund, major and planned giving, and campaigns. The Vice President also directs the marketing efforts, events management, and community relations of the University. The Vice President is responsible for leadership, coordination and oversight of the offices of Development, Alumni Relations, Donor and Information Services, and University Marketing and Communications, including Printing and Mail Services. The Vice President is the Executive Director of the Illinois State University Foundation and is responsible for management of all its operations at the new Alumni Center and off-site properties at Ewing Cultural Center and the Chicago Office.

As a senior officer of Illinois State University, the Vice President reports directly to the President. In the capacity of Executive Director of the Illinois State University Foundation, the position also reports to the Foundation Board of Directors. The Foundation is the private fund-raising and gift-management organization for Illinois State University. This position supervises more than 80 full time professional and administrative staff along with support staff.

The successful candidate will possess a minimum of a Bachelor's degree from an accredited college or university. A terminal degree is desired. A proven record of significant experience in senior administrative leadership positions and success in development is desired, preferably in a higher education setting. Further, successful candidates must have experience in setting and achieving goals, staff development and supervision, and working with and motivating volunteers. Strong verbal and written communication skills are also essential.

TO APPLY

The Search Committee will accept confidential applications and nominations until the position is filled. Candidate screening will begin immediately. For best consideration, applications and nominations should be provided by February 12, 2010. An application should include a letter describing relevant experiences and interest in the position, a resume, and the names of at least five references with titles, addresses, business telephone numbers and e-mail addresses. Greenwood/Asher & Associates, an executive search firm, is assisting the University in the search.

Applications, nominations, and inquiries may be directed to: Dr. Jan Greenwood or Dr. Betty Turner Asher

Greenwood/Asher & Associates, Inc., 42 Business Center Drive, Suite 206, Miramar Beach, FL 32550

Phone: 850 650 2277 t Fax: 850 650 2272 E-mail: jangreenwood@greenwoodsearch.com

bettyasher@greenwoodsearch.com

For more information, please visit our website at <http://www.ilstu.edu/>

ISU is an affirmative action university encouraging diversity.

Membership Update

Robin L.T. Ballard



On behalf of the AFP Board of Directors we would like to welcome the following new member who joined AFP in December:

Pamela Ann Beckett

Foundation Regional Director
Lutheran Life Communities
Pleasant View Luther Home
505 College Ave.
Ottawa, IL 61350

Phone: (815) 587-1021

FAX: (815) 434-1135

pbeckett@lutheranlifecommunities.org

AFP members – please remember to bring your business card to each chapter meeting so you can enter into the drawing for a cool gift and the **Member Spotlight**.

If you or someone you know would like information on becoming an AFP member, please contact me (309) 694-8511 or rballard@icc.edu and I will be happy to send information or talk with you about it.

Looking For A Job?

Be sure to visit the AFP Job Center at www.afpnet.org/JobCenter/. This is a fantastic tool for both job seekers and employers who are seeking committed fundraising professionals. The site also has up-to-date news articles that relate to job hunting, career security, and today's economy.

Perhaps you are not yet ready to look for a new job, but are starting to think about what your next step up the ladder may be. Here's a tip: check the job postings to see what qualifications employers desire for that particular position. For example, you may find that a Master's degree or a CFRE credential is typically preferred for your next position and begin making plans to acquire the qualifications you need.

***Members Only:
Do you have an
event in March you
would like to
promote?
Please submit your
information to
Kimberly at
[kweeks@girlscouts-
qsci.org](mailto:kweeks@girlscouts-qsci.org).***

Every Member Campaign Update

Pat Poppe



Thanks to those who donated to the Association of Fundraising Professional's Every Member Campaign. We reached our goal of \$2,200, so our Chapter will be receiving a portion of that to use for educational purposes.

Central Illinois Chapter Association of Fundraising Professionals Every Member Campaign – 2009

Blue Ribbon Category - \$1- \$49

Toni Bumingham
Gloria Dearborn
Bryce M. Dexter
John J. Gibson
Jerry D. Heller, CFRE
Susan Monroe
Jeff Parmenter
Stephanie Pickett
Patty R. Poppe
Rachel Sprenkle
John B. Wahlfeld
Linda Yoder

Bronze Medalist - \$50 - \$99

Larry Brinkman
April Gould, CFRE
Loren Obalil
Rosalie A. Park
Amy M. Sajko, CFRE
Shelly Smith, CFRE
Kimberly Weeks, CFRE

Silver Medalist - \$100 - \$249

Robin Ballard
Kristen Berchtold
Robert Gray
Joy D. Hutchcraft, CFRE
Michael J. Maginn
Roger A. Meyer, CFRE
Carole M. Ringer, CFRE

Gold Medalist - \$250 - \$999

Mark A. Roberts, CFRE
Dennis A. Steele

***In 1999, our Chapter received the Abel Hanson Award for communications.
The Central Illinois Chapter was the sole winner of the award that year.***

Member Spotlight

Kristen Berchtold, AFP Central Illinois Chapter President-Elect

Girl Scouts of Central Illinois



What are you responsible for at Girl Scouts of Central Illinois (GSCI)?

As Chief Development Officer, I am responsible for directing all of the fund development efforts that support over 20,000 girl members and 5,000 adult volunteers across the 38 county jurisdiction served by Girl Scouts of Central Illinois. This involves working with a staff of five who are located in five different offices; managing relationships with 28 different United Way organizations; directing our grant writing efforts, annual campaigns, donor relations and cultivation activities, and special events; as well as working with the Board Fund Development Committee.

What impresses you the most about GSCI?

I am continually astounded at the endless opportunities Girl Scouting provides for girls. They can participate in a career exploration programs, travel across the country or across the world, lead a community service project, develop an appreciation for the natural environment at camp, explore the arts or healthy living, learn financial literacy skills, and so much more. When Juliette Gordon Low founded the Girl Scout movement, she envisioned a place just for girls where they could reach out, try new things, and achieve their dreams. The issues faced by girls today are much more complex than they were in 1912, but Girl Scouting's vision to empower, encourage, challenge, and inspire remains just the same. Today Girl Scouting provides a safe, positive place for girls to learn and grow. They develop the courage to stand up for what they believe. They build the self-confidence they need to make wise, healthy decisions and repel negative influences and peer pressure. They learn to relate to and care for others and take action to improve the world. They develop leadership skills and discover how to work together as a team to set, and achieve, their goals. Girl Scouts of Central Illinois is dedicated to reaching out to all girls ages 5-17. We invest tremendous resources to provide opportunities to those girls who are most in need of Girl Scouting's positive influence.

How did you get your start in fundraising?

Like many fund development professionals I know, I got my start in fundraising in a roundabout way. I have a degree in marketing. A few years out of college I went to work for a not-for-profit organization that didn't have any fundraising staff. Fundraising activities were those "other duties as assigned" tacked on to my job description. I didn't a clue what I was doing, but I loved it and never looked back! In my next position, I was fortunate enough to work under the guidance of a seasoned fund development professional who taught me so much.

What is the best thing about your job?

It's never boring! Things move fast and there's always lots of stuff going on. Our staff are talented, dedicated, and fun. Our volunteers are caring and truly committed to the girls they work with. But the best thing about my job is knowing that I am doing my small part to equip girls with the skills and confidence they need to be the happy, healthy, successful leaders of tomorrow – what could be better than that!

How long have you been involved with AFP and what do you like about it?

I received a C. Wilson Schroeder Membership Scholarship and joined AFP in 2005. With AFP, I have found a group of gifted fundraising professionals who are dedicated to the advancement of the profession and to helping me make my organization successful. Even though we are technically "competitors", my AFP friends are always available and willing to answer questions, share information and resources, and provide feedback and input.

What is the best career advice you have ever received?

Let your passion shine through. Someone once told me that the most important quality for a fundraising professional to have was a true passion for the mission of their organization. Sincere and unbridled enthusiasm is contagious – donors and volunteers will feel it and be inspired by it - don't be afraid to let it show. If you don't have that kind of passion for the work your organization does, maybe it's time to find a new organization.

Describe your perfect day.

Oooh, that's a tough one! Central Illinois is my home and I love living here. However, I have to say my "perfect" day would involve being somewhere exotic and far, far away - maybe on safari in Africa, a villa in the Italian countryside, a cruise through the Greek Islands, a bungalow on a deserted tropical beach somewhere, the list goes on and on...