



Fundraising matters

Quarterly Newsletter for the Utah Society of Fund Raisers

April 2005

Major Gifts Fund Raising
Thursday, April 14, 2005 • Little America Hotel
Registration begins at 11:30 am • Program starts at noon
Cost: \$25 for members • \$30 for non-members

Presenter: Beth Herman

What is a Major Gift? A major gift is a contribution that someone makes at a substantially higher level than other donors in a given organization. This type of gift is variable from organization to organization, and depending on the size of your annual budget, it could range from \$10,000 to \$100,000 or even be more than \$1,000,000. Regardless of the amount, a major gift usually is in the top 5 to 10 percent of all individual gifts contributed to your organization.

In a recent article on major gift fund raising from *CASE Currents*, author Jennifer Sachs Dahnert describes an unfortunate prospect meeting that ended in disaster. Many things can go right or wrong when we are working with a prospect for a major gifts ask. So, how do we prepare for the best possible outcome?

Presenter Beth Herman, vice president of advancement at Washington College in Chesterton, Maryland, and a national consultant, will speak about her years of experience soliciting major gifts. She will describe the major problems we encounter and provide positive, practical ways to maximize not only the gift but the relationship that we are trying to establish. Through concrete language that we can each use and many examples of what went right and what went wrong, Beth will focus on how we can be more effective in our higher level fund raising activities.

Don't miss this opportunity to learn specific strategies and scenarios for making an ask and how to craft your message in the language of the donor...a little something for everyone involved in major gift fund raising!

RSVP online at USFR.org or call Amberlie Phillips, USFR Administrator at (801) 355-1929

Please leave number of people attending, names, organization and phone number.

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Calendar **Events**

April 2005

- | | | |
|----|--|--|
| 2 | United Way of Salt Lake
Ballet West | What Matters 5K Fun Run
Evening of Elegance |
| 7 | Children's Aid Society | Birthday Gala: Celebrating 95 Years of Helping Children |
| 9 | Juan Diego Catholic High School
National Multiple Sclerosis Society,
Utah State Chapter | The Gala at Juan Diego
MS Walk |
| 14 | Boys & Girls Clubs of Greater Salt Lake
Utah Society of Fund Raisers
The Deseret Foundation | Dinner & Auction
Quarterly Luncheon
Legacy of Life Dinner and Tribute |
| 15 | Realms of Inquiry School | The Nature of Realms Dinner and Auction |
| 16 | St. Francis Xavier School
Kostopulos Dream Foundation | From The Heart Auction and Dinner
Send a Kid to Camp Dinner and Auction |
| 22 | Rape Recovery Center | An Evening with the Arts |
| 23 | Prevent Child Abuse Utah | Annual Fundraising Dinner |
| 27 | Utah Heritage Foundation | Memorial House Grand Opening |
| 29 | Utah Museum of Natural History | Gala Fundraiser |
| 30 | American Heart Association
Make-A-Wish Foundation | 2005 Heart Ball & Symposium
Team Up for Wishes |

May 2005

- | | | |
|----|--|--|
| 3 | The Road Home | One by One Breakfast |
| 4 | Pioneer Theatre Company | 2005 Bravo! Award Gala |
| 5 | Utah Society of Fund Raisers | Fund Raising Basics and Beyond Conference |
| 6 | Redeemer Lutheran School | Art in the Park |
| 7 | The Madeleine Choir School | Annual Spring Auction |
| 12 | Utah Nonprofits Association | UNA Biennial Conference on Nonprofit
Accountability |
| 14 | Candlelighters for Childhood Cancer | Light of Our Lives Las Vegas Style |
| 15 | City of Hope New Millennium Chapter | Food for Hope |
| 21 | Utah Youth Village
Utah Heritage Foundation | Dillard's Fashion Show and Luncheon
34th Annual Historic Homes Tour |

June 2005

- | | | |
|----|--|--|
| 2 | United Way of Salt Lake | Utah Saves Kick-off |
| 3 | National Multiple Sclerosis Society,
Utah State Chapter | MS Celebrity Golf Classic |
| 4 | David Eccles School of Business
Human Rights Campaign | Dean's Dinner
HRC 1st Annual Dinner |
| 11 | Utah Museum of Fine Arts | Utah Museum of Fine Arts Gala |
| 13 | The Deseret Foundation | 8th Annual AMICUS Open Golf Tournament |
| 18 | American Lung Foundation of Utah | Asthma Walk |
| 21 | Ogden Nature Center | Sunshine Breakfast |
| 25 | National Multiple Sclerosis Society,
Utah State Chapter | Utah's MS 150 Bike Tour |
| 28 | Kingsbury Hall | Fundraiser |

July 2005

- | | | |
|----|--------------------------------|--------------------------------|
| 11 | University Hospital Foundation | Stars and Pars Golf Tournament |
|----|--------------------------------|--------------------------------|

The USFR calendar includes all postings submitted to USFR.org through March 10, 2005. To post your fund raising event to the USFR statewide events calendar, log on to our website at USFR.org



Fundraising Matters is the quarterly newsletter of the **Utah Society of Fund Raisers (USFR)** and is published in January, April, July, and October as a service to its members.

USFR is a professional organization committed to serving the fundraising profession in Utah through education, annual conferences, networking opportunities, trend updates, and many other services. Annual **USFR** membership dues are \$40.00. For more information about how you and your organization can benefit through membership in **USFR**, log on to our website at

USFR.org

Articles, information and photographs from members are welcome. Copy and sponsorship deadlines are the 1st of December, March, June, and September. Direct all newsletter inquiries and submissions to jen@frcgroup.com.

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Nancy Michalko
USFR President

President's Message

We are well on our way through the winter as we welcome the first signs of spring emerging. A big question on all of our minds is whether our fund raising has reached the level we want it to be at this time of the year. We see signs of struggle with some of our sister organizations and some indication of donor fatigue; but just as spring appears, we are beginning to see the foundation for new gifts in the near future.

As your member organization, we want to partner with you through the good times as well as the struggles and life changes, to assist you in perfecting your skills. We continue to hope that your USFR organization continues to serve you well.

In May, USFR will offer a course for those of you who are new to our profession. The "Fund Raising Basics and Beyond" course is a wonderful way to get an overview of the entire fund raising profession. If you are considering this workshop, sign up as soon as possible, as we anticipate a full house. I guarantee that you will make important contacts with professionals who may serve as future mentors and who will continue to offer you assistance long after the workshop is over.

I have been serving on USFR's board for nearly one year. At this time I would like to publicly recognize Jen Parsons-Soran, who compiles this newsletter. We hear your comments that it looks great and has become a useful tool for you, and we give Jen the credit. She not only writes, edits and provides the layout for the newsletter, but she encourages us to think about what is relevant and important to you, our USFR members.

May this spring season bring new life to you and the organizations you serve. We will see you at our April luncheon on major gifts and at our upcoming workshop for new fund raisers.

Happy Spring!

Nancy

A Donor's Perspective: It's All About the Glory!

By Sharon Smith, Telethon Chair for Primary Children's Medical Center

Albert Schweitzer said, "I don't know what your destiny will be, but one thing I do know: the only ones among you who will be really happy are those who have sought and found how to serve." From personal experience, I know his statement to be true.

Sometimes I hear people say, "You volunteer? You must have plenty of time!" Nothing could be further from the truth! I *make* time to serve because I believe in the cause or causes that I am working for. It would be so easy to just get out my checkbook and write a contribution – and believe me, my husband and children wish at times I would!

Why do I do what I do? It's simple: It's all about the glory! No! I'm not referring to the rubber chicken dinners, the plaques, the flowers, or the words of praise. **It's the glory of knowing that I make a difference in a child's life...** that maybe because of the countless times I've loaded and unloaded my car of flyers and posters or the times that I've driven 250 miles to speak to 10 Wal-Mart cashiers...that maybe I've inspired others to give their time and money to make a difference, too!

What do I want in return? I serve organizations that not only need me, but respect my time. I don't want to be a figurehead. I want to be recognized as someone who can lead, who can make decisions, and will be given the appropriate support and tools to carry out a responsible assignment. If I'm going to give my precious time, I share it with those who need it and won't waste it.

I'm proud to give back to my community. The glory I seek is what Albert Schweitzer referred to...finding happiness through serving others.

Sharon Smith is a former Chairwoman for the Festival of Trees and the current Telethon Chair for Primary Children's Medical Center. She also serves in the PTA and Healing Hands for Haiti.

On the *Move*

Joyce Albrecht became first lady of Utah State University on February 2, 2005, when her husband, Dr. Stan L. Albrecht, was named the 15th President of USU. Joyce will trade her position as associate vice president for university advancement to a part-time role as director of stewardship. Joyce came to USU in 1999 as director of development services and was later named associate vice president for university advancement. Previously she worked in development at the University of Florida and served for 25 years as the administrative assistant for the College of Family, Home and Social Sciences at BYU.

Shannon Farner is serving as the interim community development manager for the future Children's Museum Discovery Center at The Gateway. In this role, she is assisting with the capital campaign and developing community relationships with past donors of The Children's Museum of Utah and future supporters of the CMDC. Previously, she worked for SLOC and as an organizational management consultant.

Amy Hansen has been selected to lead the Salt Lake Chapter of March of Dimes as their executive director. Amy has most recently served as development director for Boys & Girls Clubs of Greater Salt Lake and Utah Heritage Foundation.

Phyllis Hockett, CFRE is the associate vice president of advancement at Westminster College. Previously, Phyllis was a co-founder and partner of Pathway Associates LLC, a fundraising consulting company. She joins Westminster as part of their capital campaign management team.

Margaret Hunt has been appointed by Governor Jon Huntsman, Jr., as executive director of the Utah Arts Council. Her new responsibilities include oversight of the activities of the Utah Arts Council as well as statewide arts advocacy and community partnerships. Previously, she worked for FRCI and as director of community and economic development for Salt Lake City.

Marcia Knorr was named chief administrative officer for Youth Impact where she is responsible for fund raising, public relations, oversight of all staff and program related issues. Youth Impact provides an afterschool program for Ogden's inner city youth ages 10-18, providing a safe, nurturing environment for at risk youth. She previously served 9 years at the Utah Schools for the Deaf and the Blind as the alternative resource coordinator.

Mary Migliorelli is the new program officer at the Utah office of The Fieldstone Foundation. The mission of the Foundation is to provide grants, leadership development and service to nonprofit organizations working to support people in our communities. The Foundation participates in the community by making monetary grants to non-profit organizations and by providing leadership training for non-profit CEOs.

Amberlie Phillips is the new development director for Community Services Council. In this position, she will oversee fund raising for all four of CSC programs: Utah Food Bank, Lifecare Bank, 211 Info Bank and Ability Bank. She previously served as a development officer for Ballet West.

Jeannie Simmonds was recently named campaign manager for Utah State University's upcoming comprehensive campaign. She previously served as director of annual giving at USU, and prior to that worked in the Special Collections Division of the University Libraries as both the university archivist and state document specialist at USU. She has served as business manager for the former information learning resources department and in several capacities as a fund raiser. Jeannie is a CFRE.

Kurt Simpson was appointed to serve as executive director for the American Heart Association, Utah Division. The AHA works each day to advance cardiovascular research, spreading lifesaving knowledge and helping all Americans live longer, healthier lives. Prior to working with AHA, Simpson served as executive director of the Catholic Foundation of Utah since 1991. He is also a former vice president and board member of USFR.

Lee Roderick has been named director of annual giving at USU. Most recently he served as special assistant to former USU President Kermit Hall. Lee has an extensive background in communications, including more than a decade in Washington, D.C., as the bureau chief for Scripps League Newspapers and president of the National Press Club. In 1990, Lee returned to Utah to become news director at KSL Television. He holds a B.S. from Utah State and an M.A. from George Washington University.

Dana Tumpowsky has been appointed the new director of alumni and parent relations at Westminster College. She previously served in the public relations, development and communications departments as well as teaching Spanish as an adjunct professor at Westminster College from 1983 to 1999. Since then, Dana was the public relations manager for the Salt Lake City Public Library System.

Angela Wilcox is the new director of corporate giving at Westminster College. She previously served fifteen years with the University of Utah, most recently as major gifts officer and also served at KUED-TV television as the manager of foundation giving & corporate development.

Highlights from the February Luncheon

Secrets of Successful Social Entrepreneurs

By Mary Migliorelli, USFR Secretary

We live in a society where most Americans don't go around barn-raising or harvesting crops together anymore. But there are new American heroes emerging all around us, the "social entrepreneurs" who conceive, organize, manage and assume the risks of an enterprise for the good of society.

Michael Glauser, author of *The Business of Heart*, began his presentation with a series of compelling stories of everyday Americans who saw the needs in their communities, felt compassion and took action — the "See It, Feel It, Do It" pattern that launches organizations that make a lasting difference. Successful social ventures like Delancey Street, Suitcases for Kids, the Komen Breast Cancer Foundation and the Children's Miracle Network have a combination of compassion and long-term vision that transforms both giver and receiver, and renews the community at large.

What are the keys to building successful nonprofit organizations?

1. **Proclaim your passion!** When Mike Glauser organized a luncheon to raise one million dollars to create Ensign Peak Park, no one donated. (*Yes, our entire USFR audience gasped.*) So, Mike started over with individual phone calls "to meet me at this street," and he would walk to the top with the prospective donor to experience the journey and the view. "They have to see it, feel it, be touched by it, and experience it to want to get involved."
2. **Keep your focus.** Look for opportunities, like the youngster who made sure every child in foster care would receive a suitcase of their own, and would never have to carry their clothes and belongings in a garbage bag again.
3. **Work with tenacity.** Bob Macauley of AmeriCares had a plane full of supplies en route to earthquake victims in Armenia even before he had obtained the necessary landing permits. Bob's advice: "If you want to do something important, someone will always tell you nine reasons why you can't do it. Just mow 'em down and make things happen!"
4. **Build the right team.** Choose the people with the most passion for your cause, with the right team consciousness, who can check their egos at the door.
5. **Leave your ego behind.** Remember: It's not about you.
6. **Create a low cost system.** Decentralize, using grassroots structures instead of one large central office. Recycle constantly, and partner with existing organizations rather than re-create the wheel.
7. **Generate your own revenue.**
8. **Apply best practices.** "Get in bed with business" in every good sense of the word. (*We're all adults here. Profit is not necessarily a dirty word.*)

The challenge is yours. You are cleared for take-off. Proclaim your passion and get that plane on the runway and into the air. By the time you're ready, we'll have a landing permit for you.



Michael Glauser and Phyllis Hockett, USFR VP of Programs.



Your Calendars...

Watch for these upcoming training opportunities

Utah Society of Fund Raisers

April 14 Major Gift Fund Raising
 May 5 Fund Raising: Basics and Beyond
 Visit www.usfr.org for more information

Utah Nonprofits Association

April 19 Public Relations for Nonprofits
 May 12 Biennial Conference on Nonprofit Accountability
 Visit www.utahnonprofits.org for more information

Fund Raising Basics and Beyond

May 5, 2005 • 9 a.m. to 4:30 p.m.

Little America Hotel

Have you been in the development field for less than two years?

*Are you a current student considering a career in the
deeply rewarding profession of fund raising?*

Are you a volunteer who wants a better understanding of the development process?

*Are you a member of your organization's program staff who wants to help the
development staff build more capacity for your constituents?*

If you can answer "yes" to any of these questions, then the Fund Raising Basic and Beyond mini-conference is designed specifically for you. During the day, local development professionals will present overviews on:

- Finding and Cultivating Major Gift Donors
- Finding Corporate, Foundation, and Government Funding Sources
- Writing Compelling Proposals
- Conducting Mass Solicitation
- Planting Seeds: Marketing Planned Gifts
- Running Productive Special Events
- Managing Volunteers
- Producing a Marketing Image and Strategy
- Bringing it All Together: Creating a Development Plan and Setting Goals

Please encourage colleagues who may be interested to sign up for this valuable conference that is only offered every other year.

**Fund Raising Basics and Beyond
Mini-Conference for Newcomers to Development**

May 5, 2005

Registration begins at 8:30 a.m.

Little America Hotel

\$50 USFR Members

\$75 Nonmembers

Special student offer: A limited number of scholarships covering all or a portion of the registration fee are available to currently enrolled college and university students. For information and to apply online, go to www.usfr.org.

For more information, contact Jeffrey D. Driggs at jeff.driggs@admin.utah.edu

*Practical Advice***Five Practices to Keep Your Development Office Humming**

Like a well-tuned engine, a smoothly functioning Development Office should move along efficiently, advancing prospects from one stage of the solicitation process to another. Yet without periodic tune-ups, even the most well organized office can start losing steam and eventually stall out. *Try these simple steps to help keep your fund raising engine tuned up and get the best results possible.*

1. **Develop a Plan for the Year:** Do you know how many appeals you are going to mail during the year and to which categories of donors you are going to send? Lay out a schedule for the year including all development activities. For major donors, set a target number of meetings for each month. Above all, set monetary goals for each category based on last year's results and lay-out strategies for reaching these goals this year. Remember the adage, those who fail to plan...
2. **Drop Inactive Donors:** Are you consistently mailing to donors who haven't given in several years, hoping that they will change their minds? Marking donors who haven't given in a period of 3-5 years as inactive is a great way to prune your mailing costs. Plus, you can always try to reach them "one last time" to see if they are still interested in hearing from you.
3. **Mail to LYBUNT (gave last year but not this year) Donors:** Reengage the interest of donors who didn't give in 2004, but gave in 2003. Thank them for their past support and ask for their feedback about why they didn't participate in 2004. Ask, "Did you forget them?" and then let the donors know that you didn't. Remember, small donors can grow into big donors with the right cultivation.
4. **Rate your Donors According to Capacity and Affinity:** Consider using a wealth identification service to help identify donors who have the capacity to make larger gifts and utilize this information in targeting the ask amount in your appeals. Besides looking at the financial capacity of your donors, rate donors in terms of their affinity. Do you have donors who have been giving \$25.00 in response to every mailing? Donors who have given \$100-\$250 consistently for the past three years? Do you know who these people are? Perhaps they have the capacity to make a larger gift – if they are asked appropriately. Offer your best performing annual fund donors the opportunity to make a special one-time gift for a new project that has been matched to their interests.
5. **Make Sure you Give People a Variety of Ways to Donate:** Does your organization have a planned giving program? Do you have a bequest society? Does your website allow visitors to make donations? What about giving circles? What works for one donor may not work for another, so it is important to offer donors options that fit their inclinations.

By Elliot Kipnis, 02/18/05. Reprinted with permission from *onPhilanthropy* (www.onphilanthropy.com) © Copyright Changing Our World, Inc. 1999-2005.

Highlights from the USFR Professionalism Series Workshop

High-Speed Success: The Best and Brightest New Ideas in Online Giving

by Alicia Geesman, assistant director of annual giving, University of Utah

The second workshop in USFR's Professionalism Series presented by Robert Burdenski, an internationally-recognized fundraising consultant whose career spans more than 17 years, on February 10 offered attendees practical advice about the fastest-growing revenue stream in non-profit fundraising: the Internet.

The many ideas Bob presented include:

- E-mail pledge confirmations/reminders with link to "Pay Now."
- E-mail Thank-You messages that include a report on how donations were used.
- Provide links to matching gift sites that list employers who match charitable gifts.
- E-mailed communications should include many links within your Web site, so prospects can surf your site and learn more about your organization.

- E-solicitations should accommodate all levels of computer capabilities from simple text letters to flash video to streaming video.
- Flash and video appeals can create a deeper emotional reaction with changing images and music.
- E-mail Listserv groups allow donors to connect with those having similar interests, which sustains donor affinity and feelings of a strong donor community.

Bob also showed several examples of flash and video appeals, most available for viewing in "Bob's Briefcase" section of the www.bobburdenski.com web site. For other exciting flash appeals, visit http://www2.davidson.edu/giving/AF04/AF04_TopTen.asp or <http://www.johnshopkins.edu/movie/movie.html>.



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Membership News

We are delighted to now have a record 375 members of the Utah Society of Fund Raisers (USFR).

As a USFR member please take advantage of the fabulous training and professional development opportunities available to you. Upcoming opportunities include our Spring luncheon presentation and the "Fund Raising Basics and Beyond" mini-conference in May. Visit our website at www.USFR.org for dates and details. USFR members receive significant discounts on these trainings and presentations — and networking with colleagues at USFR events can be very beneficial as we can learn so much from one another. Feel welcome to contact me via email at cromano@ywca.com or at 537.8614 with any suggestions regarding *your* membership.

Carrie Romano
USFR VP of Membership

The Utah Society of Fund Raisers (USFR)

is a professional organization committed to serving the fundraising profession in Utah through education, annual conferences, networking opportunities, trend updates, and many others services. For more information about how you and your organization can benefit through membership in USFR, log on to our website at www.usfr.org