



Utah Society of Fund Raisers

Fundraising matters

Quarterly Newsletter for the Utah Society of Fund Raisers

September 2008

USFR FALL LUNCHEON

September 24, 2008

Marriott Center, 220 South State Street, Salt Lake City

Registration begins at 11:30 a.m.

Program Luncheon from 12:00- 1:30 p.m.

How to Build a Fund Raising Board

A strong, active, fund raising board – it’s something every nonprofit wants but few seem to achieve. For the opening luncheon of our 2008/09 program series, we’re bringing together two executive directors who have done just that— assembled fund raising boards that actually assume responsibility and work hard to achieve financial goals. And they are willing to share their secrets with you!



Franci Gillmor, Ronald McDonald House Charities: When Franci took the helm of Ronald McDonald House in 1996, the organization was teetering on the verge of bankruptcy. Today, the organization manages three facilities, operates totally in the black and has accumulated an amazing 12-month operating reserve. The secret, she will tell you, lies in the fund raising assistance of board members like May Bradley, who led board efforts that transformed a \$80,000 a year gala into the \$400,000+ event it is today. May will be on hand to help Franci share her secrets.



Jim Pugh, Utah Food Bank Services: Ten years ago, the Utah Food Bank was a subsidiary of a larger organization with no fundraising board of its own. Since then a team of individuals, including Jim Pugh and his development committee chair, Ric Hammond, have transformed both the organization, today known as Utah Food Bank Services, and its board, fostering a solid fund raising collaborative between staff members, board members, and committed non-board volunteers. The result: a strong operating reserve, a significant endowment and a successful annual development program. Jim and Ric will share their strategies with you.

Don’t miss this highly informative session moderated by Elaine Gause, CEO, Girl Scouts of Utah.

And, don’t forget to bring your own development chair!

Cost: \$25 for members/\$30 for non-members - Parking is Complimentary.

Vegetarian meals must be requested in advance.

Please Register Online at www.usfr.org

or by calling Marcie Hopkins, USFR Administrator at (801) 355-1929.

In your phone message, please leave number of people attending, names, organization and phone number.

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To See the Most Up-to-Date List of Events

Please go to USFR website at www.usfr.org

To post your fund raising event to the USFR statewide events calendar,
log on to our website at USFR.org.

A taste of what's to come:

- September 24th— “How to Build a Fund Raising Board”
- October 23rd—Lynne Twist, author of *The Soul of Money*
- Fundamentals of Fund Raising Mini Conference—more details to come

MEMBERSHIP DRIVE

Nancy Brown, Membership Chair

Abhh, autumn...

Now that it is September, it is time to enjoy wearing a jacket in the evening, to cheer at weekend football games, and to renew your annual USFR membership!

As you already know, the Utah Society of Fund Raisers (USFR) is a comprehensive network of more than 400 fundraising professionals who strive to advance humanitarian, social and creative causes throughout Utah. USFR is committed to serving Utah's non-profit institutions through advocacy, training, education and mentoring. For only a \$50 annual membership, you will receive the following benefits:

- Quarterly educational and networking luncheons
- Professional development workshops
- Job announcement list serve
- Quarterly newsletter
- Biennial Fundamentals of Fund Raising Conference (2009)
- Biennial Fund Raising Day Conference (2010)
- Mentoring program
- Access to a comprehensive non-profit industry calendar
- USFR member directory
- Numerous other involvement opportunities (committees, boards, etc.)

You can take advantage of the benefits offered through this amazing organization by renewing your USFR membership on-line at www.usfr.org.

RENEW TODAY!



Fundraising Matters is the quarterly newsletter of the Utah Society of Fund Raisers (USFR) and is published as a service to its members.

Articles, information and photographs from members are welcome.

Direct all newsletter inquiries and submissions to dandersen@westminstercollege.edu

Design, Editing, and Layout
Devra Andersen

Printing
GraphicImages

Annual USFR membership dues are \$50.00.

For more information about how you and your organization can benefit through membership in USFR, log on to our website at

USFR.org

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For additional information, please contact:
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801-355-1929
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Dear USFR Membership,

It's that time of year again—the time when we begin our membership year and gear up for the quality luncheons, workshops and conferences ahead. But instead of diving into announcements about our outstanding fall program line-up (outlined elsewhere in this newsletter), I'd like to dedicate this space to the 2008-2009 USFR Board and its new subcommittees.

USFR adopts subcommittees...

For those of you new to our organization, you may be surprised to learn that USFR only recently instituted a subcommittee structure to support its efforts. For the first time in recent history, USFR has the benefit of having Membership, Programming, Finance, Communications, Fund Raising Day Conference, and Fundamentals of Fund Raising Mini Conference Committees in addition to ad hoc Bylaws and Nominations Committees. In keeping with the broader effort to strengthen Boards of Directors throughout the state, we recognized that our *own* organization could become even more successful if it made a concerted effort to involve more talent. In so doing, we were confident that we'd benefit from more hands and that we'd gain a strong field of prepared and qualified successors.

I am happy to report success!

In just two months under this new direction, our organization has early reason to celebrate. Thanks to the Finance Committee, led by **Barry Bonifas**, USFR has achieved new fiscal viability with enhanced checks and balances and a more detailed bookkeeping and accounting process. And thanks to the Membership Committee, under the leadership of **Nancy Brown**, we have a strategic plan to expand our membership through retention of existing and recruitment of new members from organizations throughout Utah. Furthermore, our Programming Committee, led by **Dave Jones**, has been fast at work booking our first luncheon on September 24, "How to Build a Fund Raising Board," and collaborating with the United Way of Salt Lake to coproduce our second luncheon on October 23, featuring Lynne Twist, world renowned author of *The Soul of Money*. Finally, our Communications Committee, under the direction of **Devra Andersen**, has been hard at work putting together a comprehensive communications plan including newsletters, website maintenance, tips of the month, and more. I look forward to reporting even more success in our next edition.

Call for more volunteers...

I'd like to thank all of you who nominated committee members and all of you who generously agreed to serve. Please know that **Jeff Paoletti**, Chair of the 2009 Fundamentals of Fund Raising mini-conference, is looking for additional help, and that **Aimée Dunsmore**, Fund Raising Day 2010 Chair, will begin recruiting individuals to serve on her conference committee in the near future. Should you be interested in either of these opportunities, please feel free to visit www.usfr.org to secure board contact information.

All the best,

Merridith

Merridith Ferne

MORE NONPROFIT EXECUTIVES EARN MBA'S

As donors step up demands on charities and nonprofit groups seek to become more sophisticated in finances and management, an increasing number of nonprofit executives are choosing to earn master's degrees in business administration, reports *The Financial Times*.

Liz Livingston Howard, associate director of the Center for Nonprofit Management at the Kellogg School of Management, at Northwestern University, in Evanston, Illinois, says that there's been a "statistically significant increase in the past ten years" of nonprofit employees enrolled in the school's part-time master's program.

Experts say that donors are now more likely to have made their money in the business world, rather than through inheritances, and expect nonprofit groups to have businesslike approaches to using their gifts.

"When you get people with that kind of business savvy, they don't want to just write a check, but they want to change the nature of public education or global health," says Nora Silver, director and adjunct professor at the Center for Nonprofit and Public Leadership at the Haas School of Business, in Berkeley, California.

From:

"More Nonprofits Earn MBA's." *Chronicles of Philanthropy*. 29 July 2008. <http://philanthropy.com>.

BUILDING INSTITUTIONAL RELATIONSHIPS: A WORTHY INVESTMENT

*Nathan Clark, Development Director
Weber State University*

In the fund-raising world, strong, trusting donor relationships are key. We all accept the fact that these relationships take time and effort; however one area where relationships may suffer is actually on the home front with our volunteers, staff, faculty, deans and/or board members.

If a successful development officer must build positive relationships with donors outside the office, it's a lot easier when the ones in the office are meaningful as well. As we work to build our prospecting pools, cultivate donors and solicit gifts, we may find this process less daunting if we work closely with our colleagues. I'm referring to a team mentality. Yes, that means more time, more work and more relationships. But, then again, we like building relationships, right?

An effort to build institutional relationships is a wise investment in any organization. When we share these philanthropic experiences with those we work with, we will most likely find them more willing to help in our development efforts, and more understanding of our needs. Engaging in open, honest communication with colleagues builds a mutually effective partnership.

The internal culture created by building institutional relationships becomes a shared responsibility among development officers, faculty, staff, deans and/or board members. Remember, this takes time, vision and an investment to get it started.

Here are some ideas to help you build stronger relationships:

- Support and attend organizational, college, department and/or faculty events.
- Make time for “institutional appreciation” not just “donor appreciation.”
- Acknowledge appropriate professional advancements, promotions, and successes of institutional individuals with whom you work.
- Try to be more inclusive than exclusive – invite your volunteers, staff, faculty, dean and/or board members to participate in and/or attend development, donor appreciation, or cultivation events
- Send out personal thank you letters/cards.
- Arrange a visit with a board member and/or faculty member to become better acquainted with them.
- Schedule regular meetings with your Dean or Executive Director.

The inherent practice of building successful internal relationships will carry over in successfully building external relationships. So, consider spending a little more time “at home” – a worthy investment in increasing your effectiveness in fund raising.

The Utah Society of Fund Raisers (USFR)
and United Way of Salt Lake
proudly present:



Lynne Twist
Author of *The Soul of Money*

Fund Raising During Difficult Economic Times October 23, 2008

Grand America Hotel, Salt Lake City
Registration at 11:30 a.m.
Program and Luncheon from 12:00 to 1:30 p.m.

DO YOU NEED TO REVISE YOUR MISSION STATEMENT?

Is it short (17 or fewer words) and sharply focused? Would it fit on a T-shirt?

Do board members and staff know the mission statement? Is it clear and easily understood?

Does it define why you do what you do?

Does it provide direction for doing the right things?

Does it inspire your passion and commitment?

Does it say, in the end, what you want to be remembered for?

Have you revisited your mission statement in the last three years?

From:
Sprinkel Grace, Kay. [The Nonprofit Board's Role in Setting and Advancing the Mission](http://www.boardsource.org). Board Source.
<http://www.boardsource.org>.

WORKING WITH VOLUNTEERS

*Alicia Geesman, Director of Alumni & Donor Relations
Lowell Bennion Community Service Center*

If you work for a nonprofit organization, you probably work with volunteers. Although volunteers provide your organization with virtually free labor, that isn't the primary reason for utilizing them. Volunteers represent the public that you serve and engaging them in your mission is what community service is all about!

Volunteers should be seen as participating members of your staff as they can provide critical links between your organization, the population you serve, and potential donors and friends. This means acknowledging the importance of volunteers and developing infrastructures that support their work. The following strategies are intended to help you to effectively train, manage, and celebrate your volunteers, creating environments in which they are vital and effective team members.

- **Vision.** Volunteers need to appreciate the philosophy and vision that directs their work in order to effectively support your organization. Look for volunteers who know and contribute to your mission.
- **Job description.** A job description or list of expectations will help ensure that everyone is "on the same page" concerning the need for volunteer support and the parameters of the work.
- **Selective Placement.** Talk with the volunteer about his areas of interest and ask if he has personal goals for his experience. Be sure to match his skills to your organization's needs and be aware of opportunities to help him meet his personal goals.
- **Develop and provide training for volunteers.** This plan does not have to be a "one size fits all" plan. All volunteers may benefit from introductory training, but depending on individual skills, volunteers may have different needs for specific ongoing training.
- **Create a method for providing meaningful, ongoing feedback for volunteers.** Volunteers need opportunities to give and receive feedback in order to ensure their effectiveness and to strengthen their skills. Employ the "feedback sandwich" style by beginning and ending with praise (bread) and "sandwich in" any correction that needs to be made (meat—or protein, for vegetarians).
- **Create opportunities for growth and leadership of volunteers.** Most volunteers would benefit from opportunities for growth within the position. One method of position enhancement for volunteers is to provide opportunities and time for them to assist with orientation for new volunteers or to serve as mentors for beginners.
- **Make sure volunteers recognize the effect of their role on the goals of your organization.** Never pass up an opportunity to thank your volunteers. A genuine "thank you" with an example or two of specific effects they've had on your organization can be much more meaningful than the average volunteer recognition event.
- **Make time for ongoing communication.** Opportunities for volunteers to meet with staff are important in making the volunteer feel like a true member of the team. Even five minutes carved out of the beginning of a project or an e-mailed volunteer newsletter can create opportunities to share information.
- **Reflection.** Encourage your volunteers to reflect on their service experience and the social issues at the heart of your organization's work. Reflection intensifies the service experience for a volunteer, deepening his understanding of, and commitment to, your organization. Consider asking your volunteers to share reflections with you. Their stories will help you show your stakeholders the impact of volunteer engagement on your organization.
- **Be Flexible.** Remember that what worked yesterday may not work today. Be willing to listen, to experiment, and to make changes.

"People who volunteer see important needs to be met, want to work in a values-based setting, are ready to hold themselves accountable, and expect their gifts to be properly used. In the process, while they seldom articulate it, they expect the chance to grow toward their potential."

From "Called to Serve: Creating and Nurturing the Effective Volunteer Board"

Max De Pree

Volunteer programs require the same type of managerial effort that any other program effort would require, and the above suggestions are just a few factors to consider to ensure that the experience is positive for the volunteer and the organization.



Utah Philanthropy Day

December 4, 2008

Salt Palace

Convention Center

Grand Ballroom

12:00 to 1:30 pm.

Visit

www.utahphilanthropyday.org

for more information.

PLANNING EFFECTIVE EVENTS

YEAR AFTER YEAR

*Ashlee Rauzon, Director of Events
Westminster College*

Step 1—Why are we having this event?

In the beginning stages of event planning, always identify your audience, vision and purpose. Verbalize it, write it down, and make sure it is very clear. The excuse “we’ve always done it” doesn’t hold water and is a waste of energy if it doesn’t benefit the organization. It is instrumental to the success of your event to ask this question every time.

Step 2—How will I measure the success of this event?

There are many tangible ways to measure the success of an event, especially if you followed the first step. Try to determine measurements that can identify how the event meets your goals and what could be done differently. You can use a variety of measures, try to be consistent and identify them for each subsequent event. In order to determine success, you must be consistent in your evaluation. Your measures can consist of many variables, including: number of new contacts, money raised, and guests that attended. These should be gleaned from your original goal and/or purpose for the event.

Step 3—De-brief

This is a must. Do not skip this step. Make sure to include all people involved in the planning and execution of the event. It is essential to schedule a de-briefing immediately after to properly address the true measurements determined from above.

- ✓ Come prepared to ask the hard questions.
- ✓ Document.
- ✓ Execute it better next time around.

Non-profits & Politics...

Next on the Board's Agenda: Fighting State Cuts

In many states across the country, nonprofit groups are already stepping forward to ensure that candidates running for office in the November elections understand what nonprofit groups bring to the debate. They are asking every candidate to fully explain how he or she would work with nonprofit organizations and focus the energy and ideas of the community to mitigate cuts in spending, while also developing bold, new economic tactics for the future.

Every community across the country will soon be tested. The role of nonprofit organizations can no longer be limited by the unfounded fear of what might happen if they get involved in advocacy.

In fact, nonprofit leaders should be motivated by the reality of what being uninvolved has brought to our very doorsteps. We have the potential to help even the most challenged community rise above the trials that are coming, but only if we step forward now and all together.

Robert Egger is president of D.C. Central Kitchen, in Washington, and founder of the V3 Campaign, an effort to get nonprofit views considered in elections at the city, state, and federal levels.

From:

Egger, Robert. "Egger, Robert. "Next on the Board's Agenda: Fighting State Cuts." *The Chronicles of Philanthropy*. "The Chronicles of Philanthropy 26, June, 2008.

Fund Raising Day 2008



USFR Outstanding Development Officer Award Recipients



Art Swindle,
Patti N. Choate
Distinguished Service
Award Recipient



Keynote Speaker Rebecca Terry Heal & Friends
Utah's very own "Saliva Sisters"

*Fund Raising Day 2008
was a great success
with over 319 professionals in attendance.
The day featured keynote speakers Kay
Sprinkel Grace and Rebecca Terry Heal
and her Saliva Sisters.
Stay tuned for more information on
Fund Raising Day 2010!*



Keynote Speaker Kay Sprinkel Grace

For a complete event synopsis visit usfr.org

UTAH PROFESSIONALS ON THE MOVE

- **Devra Andersen** has been promoted to Director of Stewardship and Gift Management at Westminster College.
- **Emily Aplin** has been hired as the Development Assistant at Kingsbury Hall. She is a recent graduate of the University of Utah.
- **Dennis Scott Jolley**, MPH, Med has left the University Hospital Foundation and is now the Director of Marketing and Public Affairs, Clinical Neurosciences Center, University of Utah Hospitals and Clinics.
- **Jan Murphy** has been named the new Director of Development at Kingsbury Hall at the University of Utah. Jan brings with her eleven years of development experience, most recently working for the Kostopulos Dream Foundation.
- **Ashlee Rauzon** has been promoted to Director of Events at Westminster College.

JOIN THE USFR MENTORING PROGRAM

USFR has a comprehensive network of over 400 fund raising professionals who strive to advance humanitarian, social and creative causes throughout Utah.

The USFR Mentoring Program provides a way for members who are new to the profession to learn from members who have more experience as successful fund raisers, grant writers, event planners and non-profit managers.

If you are interested in participating in the program, please contact us at usfr001@hotmail.com.

Please consider participating in the USFR Mentoring Program. It is a tremendous benefit for USFR members that will help us all achieve our goals to improve our community.



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The Utah Society of Fund Raisers (USFR) www.usfr.org

is a professional organization committed to serving the fund-raising 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.