



The Utah Fund Raiser

Quarterly Newsletter for the Utah Society of Fund Raisers

June 2009

Welcome 2009—2010 Utah Society of Fund Raisers New Board Members

We are pleased to present the following new board members voted on and approved by the membership at the May 13 USFR Luncheon & Annual Meeting:

Debbie Mintowt—Philanthropy Day Liaison Chair. Debbie is a development director at Children’s Miracle Network. Her responsibilities include fund raising, marketing, and PR for major accounts. Prior to joining Children’s Miracle Network in 2007, Debbie was at the Make-A-Wish Foundation of Utah, where she was director of marketing and development. Originally from England, Debbie has a bachelor’s degree in languages from the United Kingdom, a master’s in HR and a master’s in professional communications from Westminster College. Her community involvement includes serving on the boards of the International Association of Business Communicators and Youth Theatre at the University of Utah, as well as volunteering for the mentor program at Westminster College.

Anne Asman—Member at Large. Anne was born and raised in Chicago and attended Northwestern University. She has been in Utah since 1983. Her career includes many aspects of marketing, sales and development. She was co-owner and President of AdCrafter Communications for 13 years, an Account Executive and Marketing Director at Channel 4 and Marketing Director for the Utah Museum of Natural History. She was one of the founders of what is now the McGillis School. Anne is married to ‘Mr. Asman,’ a music teacher at Cosgriff Memorial School and a professional musician. She has two sons, one a Music History graduate of Denison University, and the other an elementary and special education major at Northern Arizona University.

Diane Parisi—Nominations Chair. Diane is the Director of Development for Pioneer Theatre Company, a professional theatre in residence at the University of Utah. She started with PTC in 1994 as the theatre’s Annual Giving Director and moved to her current position in 1998. She earned a BFA in Theatre with a minor in Business Administration in 1978 from Drake University in Des Moines, Iowa and an MFA in Arts Administration in 1980 from the University of Utah. Later she served as the Director of the U’s Institute of Arts Administration. Diane taught courses in board development and financial management for nonprofits. Her career path in the not-for-profit sector and in the arts have taken her through the local organizational alphabet from RDT to FHP to UMT.

Thank you for nominating so many well-qualified board candidates. We continue to seek enthusiastic committee members, so if you are interested in serving, please see the USFR Board list at www.usfr.org for contact information.

Please also note that the following USFR Board Members will continue to fulfill their terms of service:

Renée Krebs, 2009-2010 President
Merridith Ferne, Past President
Barry Bonifas, President-Elect & Treasure
Amber Nielsen, Secretary
Aimée Dunsmore, Fund Raising Day 2010 Chair

Nancy Brown, Membership Chair
Dave Jones, Programming Chair
Devra Andersen, Communication Chair
Jeff Paoletti, Member at Large
Katherine Fife, Underwriting Chair

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Visit the USFR website at www.usfr.org
for additional articles, resources, tips, and more...



Mix together 250+ fund raising professionals
from across Utah and the west.

•
Add two incredible keynote speakers, 12+ breakout
sessions and a healthy serving of useful tips and tricks.

•
Stir together with a pinch of humor, a healthy dose of fun
and a dash of hope.

•
Let sit for one day.

•
Don't miss the 2010 Fund Raising Day Conference
Recipe for Success!

Whether you're just beginning or a Master Chef, this
biennial conference will sharpen your development skills
and help you find just the right recipe for your success.

Mark your calendars for April 21, 2010.

We hope to see you there!

~ USFR Fund Raising Day 2010 Planning Committee



The Utah Fund Raiser
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For more information
about how you and
your organization can benefit
through membership in USFR,
log on to our website at
www.usfr.org

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**For additional information,
please contact:**
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Dear USFR Membership,

I am proud to report that your 2008-2009 USFR Board has been quite busy! Concentrating on three areas of focus, we accomplished a great deal on your behalf making YOUR professional society the strongest it has ever been. Our foci included 1) governance/infrastructure, 2) quality programming, and 3) membership enhancements.

Governance & Infrastructure

- ◆ We revised our bylaws to provide for a dynamic committee structure and for perpetual succession planning. Committees include: Membership, Programming, Nominations, Communications, Finance, Fund Raising Day Conference, and Fundamentals of Fund Raising Conference.
- ◆ We consolidated the USFR Foundation and the USFR organization into one legal 501(c)(3) entity.
- ◆ We filed for and secured our charitable solicitation permit.
- ◆ We secured both general and directors & officers liability insurance.
- ◆ We established detailed bookkeeping and accounting practices.
- ◆ We revised and adopted a new Philanthropy Day management agreement with the Utah Nonprofits Association.

Quality Programming

- ◆ We collaborated with both the Utah Planned Giving Roundtable and the United Way of Salt Lake to bring you nationally and internationally-recognized speakers including Lynne Twist and Debra Ashton.
- ◆ We invited presentations from 14 of Utah's best fund raising practitioners for our first luncheon of the year, "How to Build a Fund Raising Board," and for our biennial Fundamentals of Fund Raising mini-conference.
- ◆ We concluded the year and our Annual Membership Meeting with yet another renowned speaker, Marc Pitman, who motivated us with his engaging address "Successful Fund Raising When Most Giving is Going Down."
- ◆ We experienced record-breaking attendance at each of our luncheons and at our biennial mini-conference with 25-30% of our membership present at each offering.
- ◆ We conducted session evaluations following each presentation to assess whether we met member expectations and to inform decision-making about subsequent presentations.

Membership Enhancements

- ◆ We converted our membership year from a Fall renewal calendar to a personalized anniversary calendar making it possible for all USFR members to enjoy a full twelve months of membership benefits.
- ◆ We continued to invest in and support our USFR Mentoring Program for the second year running.
- ◆ We increased nonmember pricing effective Fall 2009 to incentivize membership and to deepen member benefits.
- ◆ We instituted a voucher program effective May 2009 providing all new and renewed members the ability to bring a nonmember guest to one luncheon at the membership price.

All in all, I'd say this has been one successful year—especially considering the list above only contains the highlights! It has truly been my deep pleasure and honor to represent you as president, and I look forward to continued work with the USFR Board under the leadership of Renée Krebs. I'd also like to extend sincere appreciation to Dale Snyder, Jeff Driggs, and Maxine Margaritis who will be retiring from the USFR Board after many years of dedicated service—USFR would definitely not be what it is today without their leadership! Finally, I'd like to welcome our three new board members, Diane Parisi (Nominations Chair), Anne Asman (Member-at-Large), and Debbie Mintowt (Philanthropy Day Liaison) to the team. We are delighted to have their participation and to benefit from their experience and expertise.

Again, thank you. It has been fun!

Sincerely,

Merridith

Merridith Ferne
USFR President

USFR Members Receive New Benefits

Nancy Brown, Director of Development
Salt Lake Community College

This past year, the USFR Membership Committee focused on creating maximum value for USFR members resulting in two significant policy changes that impact your membership.

First, the calendar year for membership renewal now runs on a full 12-month cycle, based on your personal anniversary date. Combining an affordable \$50 annual membership cost with a new membership calendar provides our members a full year of benefits and helps the non-profit community in Utah maximize its training and professional development dollar. As a member, you have year-round access to our informational quarterly newsletter; an email list including job postings and industry announcements; a comprehensive non-profit industry calendar; a professional mentoring program; the online directory of USFR members; as well as the opportunity to network and learn from professionals at workshops, training luncheons, and conferences.

If you are unsure of your anniversary date, please inquire at info@usfr.org and be sure that your membership is current. Membership in USFR is a worthy investment for yourself and your organization.

Second, a new guest voucher system was announced at the USFR Annual Meeting and Luncheon on May 13 at the Grand America Hotel. Beginning this month, all USFR members will receive a voucher at the time of renewal that allows you to bring a non-member guest to one luncheon of your choice at the member price. Guests may include your executive director, a board member, a volunteer, or anyone you choose. The voucher may be used once during your 12-month membership. Each year you renew, USFR will issue you another voucher.

In conjunction with this program, USFR will amend its luncheon prices. The member price will remain at \$25 per luncheon, and the non-member price will be \$50 per luncheon. The voucher program encourages professional networking and mentoring by engaging more diverse participants at our events to enrich our discussions and add depth to our professional development efforts.

Please take advantage of this new benefit and plan to bring a guest to one of our luncheons next year! ●



The Company You Keep[®]

USFR extends a special thank you to Nathan J. Hall and Timothy L. Jaggi LUTCF with New York Life for sponsoring the May 13th Annual Meeting and program presented by Marc Pittman.

CHALLENGE YOUR ORGANIZATION; BOARD THE GREEN BANDWAGON!

**Ashlee Rauzon, Director of Events
Westminster College**

The message about going green has exploded into every part of our lives. Its growing popularity has concerned celebrities, politicians, organizations and individuals. Everyone is jumping on the green bandwagon. In conjunction with reducing your personal carbon footprint, consider ways you can transition that into your workplace. One area that can significantly diminish waste is learning how to plan environmentally friendly events. They can both drastically decrease waste and at the same time save your organization money. The most expensive and sizeable impact to deliberate when planning an event is catering. It usually is the biggest culprit for waste and damage to the environment. A few ideas to possibly incorporate into your organization is:

- ◆ Do your research and make sure to select a caterer that has a recycling program already in place. This way they can help provide creative ways to reduce or eliminate waste.
- ◆ No paper, plastic or tin-foil.
- ◆ When disposable items are required, select items made of recycled materials. Provide recycling bins and have someone stationed to assist people.
- ◆ Thoughtfully consider the type of meal you would like to offer. One thing to keep in mind is that buffets and stations require the appearance of fullness which can cause food to be wasted. A served meal with an accurate head count can help the caterer approximate the appropriate food needed.
- ◆ Make a concerted effort to choose food grown regionally and in season. This can drastically reduce the amount of fuel required to transport them.
- ◆ Centerpieces can also be environmentally-friendly. Find a local grower and select flowers that are in-season. Use potted or plantable flowers that guests can take home.

Another idea when planning your events is to consider alternate advertising, by implementing these suggestions:

- ◆ Begin integrating the use of electronic media: website, email, electronic newsletters for advertising an event.
- ◆ Offer electronic registration or confirmation.
- ◆ Avoid mass distribution of handouts by making it available electronically.
- ◆ Display a program on a large screen or have it printed selectively and placed in frames around the tables.
- ◆ Provide reusable name tags.
- ◆ Use flyers sparsely and strategically, for example where people congregate.
- ◆ Design signs that are timeless so that you can reuse them at your next event or use recyclable signs.

Last but certainly not least, share your efforts. Create a report and track your success. Make sure you can clearly denote the money and waste saved by your inventiveness. This will assure your donor and friends that you and your organization are thoughtful with your resources.

Hopefully this can begin to have a domino effect, and we can all learn from each other and the areas that are most effective in preserving our natural resources and eliminating waste. ●

“The Ojibwe people believe that making a decision with an eye on seven generations ahead means more than just making a long-term decision. It means taking into consideration the lives of seven generations of children.”

MYTHS ABOUT MENTORS

– BUSTED!

**Nancy Brown, Director of Development
Salt Lake Community College**

As an organization focused on professional development, USFR has many members who can benefit from being a mentee and learning from someone with experience.

But to be effective, does a mentor have to be an experienced sage who offers perfect advice and wisdom? Not necessarily. Here, we bust some myths about being a mentor.

I'm not an expert and I'm not sure that I have any great wisdom to share.

You do not have to have years and years of experience to be an effective mentor. Simply defined, a mentor is a person with some experience who helps someone else set professional goals and develop the skills to reach them. We all have valuable experience in one area or another, and the key to being a mentor is sharing that experience so others can learn from your mistakes and your victories.

I don't have the time to be a mentor.

Although you should carefully consider your personal schedule when you agree to be a mentor, it doesn't need to take a lot of time. You play a key role in managing the mentoring relationship and you can set limits on when and how you interact with your mentee. We all have to eat, and a quick luncheon is a great time to offer mentoring advice. Sometimes all a mentor needs is a quick phone call or email. With planning, you can certainly be an effective mentor in a manageable amount of time.

What if my mentee and I don't get along?

Like any professional relationship, not every mentoring partnership will have perfect chemistry. If you set realistic expectations, respect the guidelines and limits you set together, and have open and honest communication most problems can be mitigated.

Being a mentor can be very rewarding. Mentors help our entire profession, lifting us collectively, to higher levels of success. We are all in this boat together, and to truly impact our community we need to work together. When one of us is successful, we are all successful. ●

ARE YOU LISTENING?

**David Jensen, CPRW, CARW, CEIP
Ascension Writing Services**

The number of blog posts, twitters, and articles posted online each month reaches into the millions. This clearly means that there are many people out there with a lot to say. While it's good to provide worthwhile information and exchange ideas, effective communication includes employing good listening skills. This is especially helpful when you are seeking funding for your program. "In any business there is always more you can learn," said Chris Ross, vice president of the Burton Group advertising agency. "It's more about listening than talking."

Fund raising efforts are often rejected because the funder and program was not matched properly. When you initiate communication with potential funders for your organization, it's a good idea to practice active listening skills. This is more than just hearing what a representative has to say. It's important to ensure that you are hearing and retaining information that is pertinent to a donor's interests and requirements.

Effective listening helps determine if a potential donor is a good fit for your organization's needs. You can often pick up subtle clues about the type of programs a donor is passionate about by recognizing their enthusiasm toward the programs they support. This should help you determine if the donor is a potential match for your program before you draft a query or proposal.

To improve your listening skills, communication experts encourage practicing reflective listening when you are engaged in conversation. This means that you are focusing only on what the speaker is saying. In order to clearly understand and retain the information you receive, repeat key phrases to ensure that you understand them correctly.

Quality listening is an important part of effective communication. People recognize and appreciate

when you offer your full attention and truly strive to hear and understand what they are saying.

This is an equally important skill to master in your fund raising efforts. ●



WE'RE IN THIS TOGETHER!

Lisa Himonas, Development Director
University of Utah College of Social Work



Marc Pitman invited a wildly cheering crowd to get “REAL” with their fund raising efforts. The fund raising training Executive Coach and author spoke at the USFR annual membership luncheon on May 13 where he encouraged attendees to **R**esearch, **E**ngage, **A**sk, and **L**ove their donors.

Mr. Pitman noted that researching prospects and dollar goals is critical and easier than ever with Google and other internet tools. Get your information and set your strategy, he advised, otherwise “if you don’t know where you’re headed, you’ll end up somewhere else.” Next, be sure to engage your donors—go where the conversations are and use words that have meaning to them rather than development jargon. Eventually you do need to ask your prospects for money, but ask compassionately and take time to listen to what they have to say. Finally, remember to love these people. Say thank you between gifts—seven times, be flexible regarding pledge agreements now, and show the people who support us that we care about them.

Mr. Pitman acknowledged that the current recession has caused stress for many, but he pointed out that it is critical for fundraisers to remain optimistic because our missions are more important than ever and because if we doubt, our donors will doubt—rather than donate. He pointed out that the people we serve still require assistance; not asking for support only reduces what our organizations can provide for them during their time of need.

“There’s nothing compassionate about NOT asking,” stated Mr. Pitman.

As for the wild cheering—Mr. Pitman got that because he asked for it, of course. ●

For a copy of this PowerPoint presentation go to: www.usfr.org. You may contact Marc Pitman directly at marc@fundraisingcoach.com or make use of free resources on his website: www.fundraisingcoach.com.

“Fun”damentals of Fund Raising

Jeffry Paoletti

Associate General Counsel for Development
University of Utah

On April 23, 2009 over sixty-five development professionals gathered at Westminster College to attend the USFR’s “Fundamentals of Fund Raising” biennial conference. The majority of attendee’s are new to the fund raising field, some had even stated that the conference was their first day on the job.

Presenters covered topics basic to the fund raising profession. Topics included the annual fund, planned giving, major gift fund raising, special event planning, working with your board, volunteers and leadership, suggestions on creating opportunities with corporations and foundations, and a wrap session on strategic planning.

The “faculty” included Kathryn Brussard, Safia Keller, Barry Bonifas, Beth Stratham, Anne Burkholder, Denise Winslow, Aimée Dunsmore, David Driggs, Julie Geilman and Shane Cragun. Based on the evaluation reports, the material covered was relevant and the presenters did a superior job.

This conference is presented every other year and is designed for newer development professionals. The next conference will be held in 2011. ●



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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.