CHANGING OURSELVES, TRANSFORMING THE WORLD

There are a lot of great quotes about change, and especially about changing the world. But there’s one that I think encapsulates the evolution and work of AFP in 2017. Leo Tolstoy said, “Everyone thinks of changing the world, but no one thinks of changing himself.” Perhaps the corollary to that is another quote, this one by the Muslim poet and theologian Rumi: “Yesterday I was clever, so I wanted to change the world. Today I am wise, so I am changing myself.”

We all want to change and transform the world. When you get down to it, that’s really the goal of AFP—to help you, fundraisers across the globe, transform the world. But you cannot change the world if you are not open to change yourself—and that was the theme and driving principle of AFP in 2017. We HAD to change if we were to help you transform the world.

Our change started with the most basic aspects of our association. Working with a talented Board and a capable staff, we stabilized our financial position in 2017 and placed AFP in a positive net asset position for the first time in a decade. The Board also approved one of the biggest and most important governance transformations in our history, with critical changes to our bylaws and board structure, all of which will help strengthen AFP in the long-term.

But our change was more far-reaching than just our financials and our operations. It represented a shift in our culture and a desire to live up to the principles that our profession and our sector stand for: transparency, equity, diversity, impact and equality.

We added a fifth pillar to our 2017–2019 Strategic Plan, Advance Social Good, reflecting the change that we want to make in the world and not just focus on our programs and departments. We added equity and equality to our diversity and inclusion efforts, because focusing on the latter two principles weren’t sufficient in our desire to create a fundraising profession that is open, vibrant and nurturing for all who wish to enter. Our focus on transparency and openness included posting our audited financials and Form 990s on the AFP website, something that hadn’t been done before.

Change like this has to come from the top, and AFP was lucky to have been served by two very able presidents and CEOs in 2017. Jason Lee, our interim president for 14 months, came into a difficult situation and begin our remarkable turnaround. I’m forever indebted to him for his dedicated, unselfish and principled leadership.

Then in November, we hired Mike Geiger, MBA, CPA to be our new president and CEO. Few volunteer chairs ever have the opportunity to lead such an important process and help choose a new CEO. I’m honored to have played a part in choosing Mike, along with the search committee chaired by Bob Carter, CFRE. Mike represents the principles and the change that we need to continue to demonstrate as leaders in the profession and the sector.

Change must come from within, and I’m so proud of everything we changed with the help of so many great volunteers and staff. I invite you to take a look at all that we accomplished this year, from education and research to public policy and the work of our foundations, to help you transform the world.

Ann Hale, CFRE
Chair
Association of Fundraising Professionals
By the end of the year, just seven months after its creation, the AFP Canada Board had addressed the following priorities:

- Creating a Terms of Reference for the Board of Directors and each committee
- Completing a skills mapping exercise to help recruit the staff position for the first vice president, AFP Canada.
- Beginning work on a significant communications campaign, in partnership with Rogare, a think tank, centered around creating a “new narrative” for the fundraising profession.
- Deciding to create an AFP in Canada Strategic Plan in conjunction with the AFP Foundation for Philanthropy–Canada.
- Implementing a process through the Nominating Committee and involving an all-Canadian-member vote to elect the 2018 Board of Directors
- Held a Day in the Ridings event on November 3, 2017, where Canadian leaders reached out to their members of Parliament through more than 75 different meetings.

It has been an exciting and rewarding inaugural year for AFP Canada and I am proud to serve as the first chair of the Board.

Scott Decksheimer, CFRE
Chair
AFP Canada

The signing ceremony for AFP Canada took place during the AFP International Fundraising Conference in San Francisco, Calif., on May 1, 2017.
2017 PROGRAMS, INITIATIVES, ACHIEVEMENTS AND MILESTONES

Capacity to Invest in Opportunity

• Ended the year with more than 31,500 memberships in 239 chapters around the world.

• Created and launched the new AFP Canada Board of Directors, a body that will lead AFP efforts in that country and provide even greater service, programs and leadership to Canadian fundraisers.

• Added a fifth pillar, Advancing Social Good, to the current Strategic Plan 2017–2019 and developed metrics to measure success in each of the five pillars (including Capacity to Invest in Opportunity, Relevant Quality Education, Inclusion and Influence, and Advocacy, Policy and Ethics).

• Named Mike Geiger, MBA, CPA, to serve as the new president and CEO of AFP.

• Awarded 86 chapters with the Ten Star status and 37 other chapters with the Ten Star Gold status for their work in advancing the strategic plan on the local level.

• To enhance transparency, posted our audited financials and Form 990’s on the AFP website.

Relevant Quality Education

• Held a hugely successful International Fundraising Conference in San Francisco, with more than 3,700 people attending and a record number of proposals submitted for educational sessions.

• Updated all three of AFP’s core educational courses: Fundamentals of Fundraising, CFRE Refresher and Donor Retention: A Self-Assessment Workshop.

• Launched a comprehensive evaluation and audit of the association’s professional development offerings, which will conclude in 2018 with recommendations for new educational programs.

• Started several initiatives to build a cadre of well-trained and prepared facilitators to increase the effectiveness of AFP’s professional development programs.

• Develop and released groundbreaking research, including the latest What Canadian Donors Want Survey, new quarterly reports from the Fundraising Effectiveness Project, and surveys from the Nonprofit Research Collaborative covering fundraising results and trends from across the year.

• Provided more than 30 webinars for members featuring leaders in the fundraising field, including four free presentations.
Inclusion and Influence

- Supported more than 125 chapters in holding National Philanthropy Day events involving more than 50,000 people and recognizing donors, volunteers, corporations, foundations and others around the world.

- Approved a new IDEA (Inclusion, Diversity, Equity, Access) committee and board policy, adding the principles of equity and access to our inclusion and diversity efforts, including plans to launch new programs and campaigns in 2018.

- Awarded the Friends of Diversity designation to 74 chapters.

- Offered 114 Chamberlain Scholarships, 18 Diversity Scholarships and 12 Collegiate Scholarships to attend the 2017 International Fundraising Conference

- Received two grants through the AFP Foundation for Philanthropy–Canada totaling more than $100,000 to expand the Fellowship in Inclusion and Diversity program across the country.

- Published two special supplements on giving and philanthropy through a partnership with The Globe and Mail in Canada.

- Held the 8th International Fundraising Summit attended by 25 CEOs and board members representing 11 different national fundraising associations in San Francisco prior to the International Fundraising Conference.

Advocacy Policy and Ethics

- Educated Congress about the negative impact of expanding the standard deduction in tax reform, resulting in universal charitable deduction legislation or amendments offered by Rep Mark Walker (R-NC), Sen. James Lankford (R-OK), Sen. Ron Wyden (D-OR), and Debbie Stabenow (D-MI).

- Participated in a joint letter with National Council of Nonprofits and others in opposition to the repeal of the Johnson Amendment.

- Chaired the Charitable Giving Coalition and led efforts to ensure the charitable deduction will not be eliminated or modified, including holding a Capitol Hill Fly-In Day to raise awareness about giving and fundraising issues in Congress.

- Raised more than $43,000 for the AFP Political Action Committee and supported Members of Congress in both parties who pushed legislation supportive of giving and fundraising.

- In Canada, held the first Day in the Ridings event, meeting with more than 70 Members of Parliament, introducing AFP and talking about fundraising and philanthropic policy issues.

- Testified before Parliament on modernizing the charity-government relationship and submitted comments to the Standing Committee on Finance.
THANK YOU TO OUR SPONSORS

AFP thanks all of our sponsors and partners who supported the work of the association in 2017 in advancing ethical and effective fundraising.

**AFP Strategic Sponsors**

AFP’s Strategic Sponsors support the fundraising profession, as well as the broader philanthropic community, and partner with the association on important projects and events.

- Blackbaud
- The Chronicle of Philanthropy
- DonorPerfect

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Arlington, Va.
2017 CHAPTER TEN STAR/ TEN STAR GOLD AWARDS

The Chapter Ten Star/Ten Star Gold Awards honor those chapters who have accomplished many of the key objectives outlined in the Strategic Plan. Congratulations to these chapters.

**Ten Star Gold Award Chapters**
- AB, Edmonton & Area Chapter
- AK, Alaska Chapter
- AL, Alabama Chapter
- AL, Northern Alabama
- AR, Arkansas Chapter
- AR, Northwest Chapter
- AZ, Greater Arizona Chapter
- AZ, Southern Chapter
- CA, Desert Communities Chapter
- CA, Golden Gate Chapter
- CA, Greater San Fernando Valley Chapter
- CA, Yosemite Chapter
- FL, Indian River Chapter
- FL, Nature Coast Chapter
- FL, Suncoast Chapter
- IL, Rockford Chapter
- LA, Greater Baton Rouge Chapter
- LA, Greater New Orleans Chapter
- MD, Western Maryland Chapter
- MN, Minnesota Chapter
- NC, Charlotte Chapter
- NC, Triad Chapter
- OH, Central Chapter
- OH, Greater Cincinnati Chapter
- OH, Northeast Chapter
- ON, Golden Horseshoe Chapter
- OR, Oregon & SW Washington Chapter
- PA, Eastern Chapter
- SC, Piedmont Chapter
- TN, Southeastern Chapter
- TX, East Texas
- TX, San Antonio Chapter
- TX, Texas Plains Chapter
- VA, Hampton Roads Chapter
- WI, Greater Madison Chapter
- WI, Northeast Chapter
- WI, Southeastern Wisconsin Chapter

**Ten Star Award Chapters**
- AB, Calgary & Area Chapter
- AZ, Northern Chapter
- BC, Vancouver Island Chapter
- CA, Capital Chapter
- CA, Greater Los Angeles Chapter
- CA, Inland Empire Chapter
- CA, Orange County Chapter
- CA, San Diego Chapter
- CA, Santa Barbara/Ventura Counties Chapter
- CA, Silicon Valley Chapter
- CO, Colorado Chapter
- CT, Fairfield County Chapter
- CT, Fairfield County Chapter
- DC, Washington DC Metro Area Chapter
- FL, Central Chapter
- FL, First Coast Chapter
- FL, Palm Beach County Chapter
- FL, Southwest Chapter
- GA, Greater Atlanta Chapter
- HI, Aloha Chapter
- IA, Central Chapter
- IA, Eastern Chapter
- IA, Greater Tri-State Chapter
- IL, Central Chapter
- IL, Chicago Chapter
- IL, East Central Chapter
- IL, Quad Cities Chapter
IN, Indiana Chapter
IN, Northeast Chapter
KY, Bluegrass Chapter
KY, Greater Louisville Chapter
LA, North Chapter
MA, Massachusetts Chapter
MB, Manitoba Chapter
MD, Maryland Chapter
MI, Greater Detroit Chapter
MO, Mid-America Chapter
MO, St. Louis Regional Chapter
MX, Monterrey Chapter
NC, Western Chapter
NE, Nebraska Chapter
NH, Northern New England Chapter
NJ, New Jersey Chapter
NJ, Southern New Jersey Chapter
NM, New Mexico Chapter
NY, Central Chapter
NY, Genesee Valley Chapter
NY, Hudson-Mohawk Chapter
NY, Long Island Chapter
NY, Mid-Hudson Valley Chapter
NY, New York City
NY, Western Chapter
OH, Greater Cleveland Chapter
OH, Greater Dayton Region Chapter
OH, Northwest Chapter
OK, Eastern Oklahoma Chapter
OK, Oklahoma Chapter
ON, Greater Toronto Chapter
ON, South Eastern Ontario
PA, Berks Regional Chapter
PA, Central Chapter
PA, Greater Philadelphia Chapter
PA, Northeast Chapter
PA, Western Chapter
QC, Quebec Chapter
SC, Central Carolina Chapter
SC, Lowcountry Chapter
SK, Regina Chapter
TX, Fort Worth Metro Chapter
TX, Greater Austin Chapter
TX, Greater Dallas Chapter
TX, Greater Houston Chapter
TX, Lubbock Area Chapter
TX, San Antonio Chapter
VA, Central Chapter
VA, Shenandoah Chapter
WA, Advancement Northwest Chapter
WA, South Sound Chapter
WI, Upper Mississippi Valley Chapter
2017 FRIENDS OF DIVERSITY CHAPTERS

The Friends of Diversity Designation recognizes those chapters who have accomplished many of the key objectives outlined in the advancing diversity strategic goal. This designation encourages chapters to perform specific activities designed to increase diversity within fundraising and public awareness of the importance of philanthropy in all cultures.

AB, Calgary & Area Chapter
AB, Edmonton & Area Chapter
AK, Alaska Chapter
AL, Alabama Chapter
AL, North Chapter
AR, Arkansas Chapter
AR, Northwest Chapter
AZ, Greater Arizona Chapter
AZ, Southern Chapter
BC, Vancouver Chapter
BC, Vancouver Island Chapter
CA, Golden Gate Chapter
CA, Greater Los Angeles Chapter
CA, Greater San Fernando Valley Chapter
CA, Inland Empire Chapter
CA, Orange County Chapter
CA, San Diego Chapter
CA, Santa Barbara/Ventura Counties Chapter
CA, Silicon Valley Chapter
CA, Yosemite Chapter
CO, Colorado Chapter
DC, Washington DC Metro Area Chapter
FL, Central Chapter
FL, First Coast Chapter
FL, Indian River Chapter
FL, Nature Coast
FL, Palm Beach County Chapter
FL, Space Coast Chapter
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LA, Baton Rouge Chapter
LA, Greater New Orleans Chapter
LA, North Chapter
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MA, Western Chapter
MB, Manitoba Chapter
MD, Western Maryland Chapter
MI, Greater Detroit Chapter
MI, West Michigan Chapter
MN, Minnesota Chapter
MO, Mid-America Chapter
MO, St. Louis Regional Chapter
NC, Triad Chapter
NJ, New Jersey Chapter
NJ, Southern Chapter
NM, New Mexico Chapter
NY, Genesee Valley Chapter
OH, Central Chapter
OH, Cincinnati Chapter
OH, Greater Cleveland Chapter
OH, Greater Dayton Region Chapter
OH, Mahoning-Shenango Chapter
OH, Northeast Ohio Chapter
OH, Northwest Chapter
OK, Eastern Oklahoma Chapter
ON, Greater Toronto Chapter
ON, Ottawa Chapter
PA, Berks Regional Chapter
PA, Eastern Chapter
PA, Greater Philadelphia Chapter
PA, Western Chapter
QC, Quebec Chapter
SC, Lowcountry Chapter
SC, Piedmont Chapter
SK, Saskatoon Chapter
TX, East Chapter
TX, Fort Worth Metro Chapter
TX, Greater Austin Chapter
TX, Greater Dallas Chapter
TX, Lubbock Area Chapter
TX, Texas Plains Chapter
VA, Hampton Roads Chapter
VA, Shenandoah Chapter
WA, Advancement Northwest Chapter
WI, Greater Madison Chapter
WI, Southeastern Wisconsin Chapter
In my first year as chair of the AFP Foundation for Philanthropy–U.S. we accomplished a lot. Lori Gusdorf, CAE joined the Foundation staff as the new executive vice president after her long career with AFP as the vice president of membership and chapter services. With her intimate knowledge about AFP, our members and chapters we were able to make great strides in putting a new committee structure into place using our talented Fundraising Board. Committees concentrated on raising funds for BE the CAUSE, Chamberlain Scholarships, Diversity Scholarships, Leadership Academy and stewarding our donors.

The Foundation put itself back on track with a positive bottom line in 2017 and provided many forms of impact for the fundraising profession. Some of the highlights and milestones of the Foundation’s 2017 work included:

• **Making Educational Opportunities Available:** For the 2017 AFP International Fundraising Conference in San Francisco, the Foundation provided 114 Chamberlain Scholarships (for first-time attendees), 18 Diverse Community Scholarships and 12 Collegiate Scholarships, giving scholars the opportunity to engage with thousands of fundraisers at the largest fundraising conference in the world. The Foundation also granted 11 Leadership Scholarships for members to attend the 2017 Leadership Academy in Cincinnati, Ohio.

• **Supporting AFP Chapters:** The Foundation distributed $69,500 back to chapters who achieved or exceeded their BE The CAUSE fundraising goals. Chapters then used these funds to fund a variety of professional education, leadership development, ethics and public awareness programs in their communities.

• **Leadership Development:** The AFP Leadership Academy in Cincinnati, Ohio, was sponsored by the AFP Foundation for Philanthropy for the second year. The Foundation is proud to provide this important educational opportunity for our chapter leaders and fundraising professionals on their leadership development.

• **Research:** The Skystone Partners Research Prize was awarded to Dr. Lilya Wagner, for her book, *Diversity and Philanthropy: Expanding the Circle of Giving*.

• **Ethics:** A complimentary webinar: “Accepting Gifts from Pablo Escobar and Other Ethical Dilemmas” was funded through the Claudia A. Looney, CFRE Fund for Ethics in Fundraising.

• **Best Practices:** The Growth in Giving initiative, which creates measurement tools as part of the Fundraising Effectiveness Project, moved to the Foundation’s portfolio. This collaborative research team is providing important information for the sector on a quarterly basis.
As the Foundation provided important resources for the fundraising profession, the strategic need for leadership development for the fundraising profession rose to the top of our priorities. Ensuring that we have qualified fundraising professionals to move into senior positions within the nonprofit sector over the next decade as baby boomers retire is a key strategy that AFP and the AFP Foundation for Philanthropy will concentrate on in the coming years.

Thank you very much to the AFP Foundation for Philanthropy’s donors. Your commitment to the fundraising profession and the sector is very much appreciated.

Brian Bonde, ACFRE
Chair
AFP Foundation for Philanthropy–U.S.
The AFP Foundation for Philanthropy–Canada in 2018 is proud of the many achievements and impact made possible through the support of our donors. The Foundation is proud of AFP’s growth in Canada with the creation of the new AFP Canada Board who will be an important partner and collaborator of the Foundation’s work.

There are many remarkable stories of the Foundation doing what it was created to do: supporting the advancement of the fundraising profession, and helping each member reach his or her own true potential. For us, some of the highlights of the year were:

• **Supporting Local Initiatives:** The Foundation granted more than $41,000 back to chapters to help fund programs on the community level that advanced fundraising and philanthropy. These grants included scholarships to local programs and offering fundraising education in the community.

• **Making Education Opportunities Available:** Thirty-one individuals were able to attend high-quality educational events, including the AFP International Fundraising Conference, AFP Toronto Congress, AFP Leadership Academy, and local/regional gatherings, through $23,961 in scholarships granted by the Foundation through the National Scholarship Program, James Julien Scholarship and Mo Davies Bursary Fund.

• **Advancing Fundraising Knowledge:** *The Disrupters’ Panel: Breaking Barriers, Smashing Ceilings, and Changing Minds through Effective Leadership* livestream was held at the Toronto Congress with the Foundation’s support.

• **Promoting Diversity and Inclusion:** Fellows have mentors, work on projects and write blogs on their experiences and perspectives on fundraising and inclusion. See [www.afpinclusivegiving.ca](http://www.afpinclusivegiving.ca) for more information.

• **Research for the Fundraising Profession:** The fourth iteration of “What Canadian Donors Want” data collection was done at the end of 2017 in conjunction with IPSOS.

On July 1, 2017, Roger Ali, MBA, CFRE took the reigns as chair of the Canada Foundation. He has two overarching goals that he identified for his tenure.

1. Strengthen communications with chapter leaders by providing information in a measured and integrated way. With more engagement with the chapters, it will build a supportive network for the Foundation.

2. Develop an integrated fundraising plan that includes the Every Member Campaign, and our major gifts work. It also must include a stewardship component.
At the same time, on June 30, 2017, Leah Eustace, ACFRE completed her two-year term as Board Chair. Under her leadership the Fellowship in Inclusion and Philanthropy Program graduated 61 Fellows over the two years of the program. This program was funded by a grant from the Ontario Ministry of Citizenship, Immigration and International Trade. While many other accomplishments like the ones described above occurred during her leadership, her passion for diversity and inclusion is something to be commended as she has worked diligently in this area on behalf of the Canada Foundation Board since 2011.

Leah Eustace, ACFRE  
Immediate Past Chair  
AFP Foundation for Philanthropy–Canada

Roger Ali, CFRE  
Chair  
AFP Foundation for Philanthropy–Canada
The AFP Foundation for Philanthropy–Mexico is continuing to make impact for the fundraising and philanthropic sector.

2017 was our second full year of operation, and it has been a year of rewarding partnerships. We received a second generous grant from IBM De México Comercialización Y Servicios, S De R.L. De C.V, which produced two Spanish language webinars on “How to Cultivate Donors” and “Creating Your Development Office”, as well as translation of the book, Empowering Your Board, by Marcy Heim. We are grateful to IBM for our continued partnership.

The Foundation also partnered with the Junta de Asistencia Privada of Mexico City in completing the print of the Empowering Your Board by Marcy Heim so that the Spanish version of the book could be distributed to fundraising professionals through the Junta’s network. The AFP Mexico Foundation was a sponsor of the Cumbre Iberoamericana 2017 in Mexico City with 450 attendees where Marcy Heim was a keynote speaker.

The 2nd National Encounter of Mexican Chapters was held in Monterrey, Mexico, on March 10-11, 2017. The Chapters partnered with Tec de Monterrey in sponsoring the event with 140 attendees. Jason Lee, Esq., AFP Interim President and CEO, was a keynote speaker at the event.

In addition, the Foundation also continues to work with INDESOL, a Mexican governmental agency, to provide fundraising education and AFP scholarships to small nonprofits across the country. Most importantly, the Foundation is working with INDESOL to develop an organizational code of ethics for all Mexican charities.

The Board would like to thank all of our donors who have supported the Foundation through their gifts of time, money and commitment. Your engagement is what makes our work possible. We look forward to working with you well into the future as we further build the story of the AFP Foundation for Philanthropy–Mexico and its impact upon our country’s fundraising.

Carlos L. Madrid Varela
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Arlington, Va.

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President and Founder
Hazen Inc. and HILT
Washington, D.C.

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- Overall Giving: CA, San Luis Obispo Chapter ($1,922)
- Participation: FL, Nature Coast Chapter (52.38%)
- Increased Participation: ON, Central Chapter (27% Increase)
- Chapter Impact Campaign: CA, Greater San Fernando Valley Chapter ($750)

Chapter Grouping II:
- Overall Giving: TX, Permian Basin Chapter ($5,860)
- Participation: TN, Southeastern Chapter (59.26%)
- Increased Participation: IL, Central Chapter (22.24% Increase)
- Chapter Impact Campaign: CA, Desert Communities Chapter ($1,450)

Chapter Grouping III:
- Overall Giving: MB, Manitoba Chapter ($9,880)
- Participation: AL, Alabama Chapter (41.09%)
- Increased Participation: ON, Golden Horseshoe Chapter (13% Increase)
- Chapter Impact Campaign: AK, Alaska Chapter ($2,500), OH, Northwest Chapter ($2,500), Oregon & SW Washington Chapter ($2,500)

Chapter Grouping IV:
- Overall Giving: AB, Calgary & Area Chapter ($18,690)
- Participation: AB, Calgary & Area Chapter (23%)
- Increased Participation: CA, San Diego Chapter (4.37% Increase)
- Chapter Impact Campaign: OH, Greater Cincinnati Chapter ($10,000)

Chapter Grouping V:
- Overall Giving: ON, Toronto Chapter ($46,920)
- Participation: ON, Toronto Chapter (25%)
- Increased Participation: GA, Atlanta Chapter (6.08% Increase)
- Chapter Impact Campaign: NJ, New Jersey ($10,000)
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One such program is the Chamberlain Scholars program. This program provides the opportunity for a first-time attendee from each AFP chapter to attend the International Conference on Fundraising. These scholarships are funded by contributions to the BE the CAUSE Campaign and through a planned gift from Ralph E. Chamberlain, CFRE, a deeply committed philanthropist and AFP volunteer who began his distinguished career in 1960.

In addition, the Foundations also support the Diverse Communities in Fundraising Scholarship Program, as well as the Collegiate Scholarships Program, for new fundraisers in our collegiate chapters.

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Shelly Anne Nightengale, BA
Rick L Nikkel
Kristie Nix, CFRE
Liz Nixon
Denise M. Noe
Amanda L Nogle, CFRE, MPH
Paul Nolley
Cheryl Nolting
Holly Nonnemacher
Jennifer Van Noort
Michelle Norris
Valerie Norwood
Dawn Nowakowski
Paul Nye, CFRE
Kristi Oberg
Constance A Obrien
Carol L. O'Brien
Mae O'Brien, CFRE
Daintry O'Brien
Erin Obryan
Lutrelle O'Cain
Terrance J. O'Connor
Ellen O'Connor
Kimberly O'Donnell, MS
Deborah O'Donnell
Karen O'Donohoe, MS
Jasmine T. Okafor
Judith R.T. O'Kelley, JD
Kristine Olafson, BA
Kenneth Oldham Jr, CFRE
Katie Brennan O'Leary
Donna R. Olesen
Trina Steele Olidge
Courtney Anne Oliphant, BA
Andrea Olsen-Black
Connie ÒOlson, CFRE
Wayne Olson
Anne Ondercin
Jake O'Neal
Carol O'Neal
Mary Ontko, CFRE
David Ordan
Shelly Orenstein
Joy Orlich
Karen Ormerod, CFRE
Sarah Ory, MNM
Angela Osborn, CFRE
Susan Oshiro
Paula Marie Osterday
Patricia Ostiller, CFRE
Rex A Otey, MA
Jessica Otto, CFRE, MA
Victoria Overholser
Ann Owen
Leslie Owen
Sharon G. Owen
Debbie Owen
Lynn Owens
Kathleen T. Ownby
Mrs. Kristin Ownby
Jennifer Oyer, CFRE
Tamara Pacada, CFRE
Anna Maria Pacik, CFRE
Karen Pack
Eileen Packer
Michael Padden-Rubin, MS
Jena Pado, CFRE
Helen T Paes
Suzi Pagel
Felicity Palmer
Angela Palomba
Jeannette Papadakis
Vicky Pape
Donna Paramore, CFRE
Tracy Pardy
Doris Parent
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<td>Kay Parkkari, BA</td>
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<td>Erin Pope</td>
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Norris Eneil Porter
Margot Porter
Marlisa Post
Mark J. Potter
Jamie Powell
Lani Powell, CFRE
Mark E. Power
Jamie M. Pratt
William Pratt, CFRE
Erin Prendergast, CFRE
Elizabeth Prenger
Pamela M. Prescott, CFRE
Stephanie Prewitt
Andrea Price, MBA
Jane A. Price
Heather Pritchard
Jeannette Privat
Michele Proffitt
Roberta Pronteau, CFRE
Lawrence Prout, CFRE
Monique Moore Pryor
Vicki Pugh, CFRE
Richard Quesnel, MBA
Kevin F. Quinn, MBA
Norah Ann Quinn
Allison Rabbitt
Kathy Short Rabon, CFRE
Jamie Ryan Rada, CFRE
Carina Raddatz
Jaime Radecke
Sumathi Raghavan
Geovanny Azucena Ragsdale
Sheila Rainey, CFRE
Kristen S. Rajchel
Julia Ramcke, CPA
Amy Ramnarine
Matthew Ramsey
Laura Randall, CFRE
Frankie Rankin
Emily Rappe Fisher
Amy B. Rasor, CFRE
Gloria Ratliff
Mitchell Ravvin, CFRE
Leisa Krish Ray
Rachel Ray
Mike Raymer
Janet Reagor
Michelle Pooch Reagor, MPA
Kathy Reasoner
Rich Redding
Melissa Reddington
Thomas Redmond
Ted K. Reese
Amy R Reich, MS
Michelle Anne Reichelt, MA
Sophia Reid, CFRE
Brandy Reid
Jodi Reid, CFRE
Michele M. Reinert, CFRE
Rose Reinert
Katie Reisor
Peter Reitmeyer
Brian Reitz
Kate Renalds
Andrea Rennie
Robb Resler, CFRE
Richard Reso
Ravi Katharine Respeto, BA
Norma Restivo
Michelle I. Reynaert
Caitlin Roberts Reynolds, MPA
Kara Nicole Reynolds
Margaret Reynolds
Laura Reznicek
Jamie Rhoades
Annie Rhodes
Liliane Elizabeth Ribeiro, MA, BS
Lily Ricci
Aimee Rice, MA
Lyndsey Ann Albanese Richards
Debra J. Salmon
Nicole Salmon
Kimberly Salome Klimt, CFRE
Elise Saltzberg, CFRE
Karen Saludo
Sarah Sam, BA
Pastor Bernardo Samano
Erin Sammis, CFRE
Kelly Sampson
Reid Samuel
Daniel Samuels
Anna Michelle Sanchez, MPA
J. Edward Sandifer
Scott Sandison
Jennie Sandler Fiocca
Jennifer Sandmaier, CFRE, BA
Kassie Sands, CFRE
Mary Saretski
John E. M. Saunders
Patti J. Saunders
Patti J. Saunders
Patricia Werner Savage
Peter C Saverine
Gretchen Alt Sawyer
Caitlin M Scanlan
Amy Scanlon
Beth Guba Schaan, CFRE
Craig R. Schaefer
Lynanne M Schaeffer
Cindy Schaffer, MBA
Patricia M. Scharr, CFRE
Amy Schauer
Julia Scheibmeir
Martha Scheidler
Jeff Scheirer
Heather Schield, CFRE
Dagmar Schildwach
Peter Schleck
Jeffrey Schleifer
Jennifer Schmidt

Chandel Elaine Schmidt, CFRE
Donna L. Schmidt
Jessica D. Schmitt
Jeff Schneider
Tara Schorr
Barbara Schramm
Bradley C. Schreiber
Barbie Schreiner
Gary Schrenk, CFRE
Paige Schultz
Betsy Schuurman
Chris Schwartz, MBA
Patricia Schwartz, MA
Peter John Schwieger, BA
Louise Sciannameo
John Andrew Scola, CFRE
Jennifer L. Scott, CFRE
Donyel Scruggs, MPA
Cyndy Searfoss
Barbara Sebben
Gisele Seguin
Bruce D. Seidel
Stacy Seiden
Joshua Selo
Helen Kathryn Sernett, CFRE
Janina Serrao, CFRE
Matt Seubert
Laurie Severs
Mila T. Sexton, CFRE
David Seyer
Amy Shackelford, CMP
Jamesha Shackerford
Marianne Shaddrix, MPA
John H. Shafer
Vanessa Shaff
Pamela Diana Shamba
Heather Merian Shand
Molly Shane, CFRE
Mary Shankster
Cindy Sharek
Suzy Sharp, CFRE
Mitzy Sharp Futro, JD
Kris Sharrar
Matt Shaw, CFRE
Karen A. Shaw
Beth Shearer, CFRE
Cathy R. Sheffield, CFRE
Barbara Shell
Diane Shen
Molly Shepherd
Corinne Sheppard
Shannon Sherman
Kara M. Shibiya, CFRE, MA
Lorraine A Shim
Tami Shimp
Mary Shirley
Samantha Shirley, BA
Diane L. Shoger
Jennifer L Sholund, CFRE
Jody Short, CFRE
Erik Thomas Showalter, CFRE
Kelly K Shrock, CFRE
Kim Shumpert, MPA
Traci Allyn Shur, CFRE
Amy Shurden
Suzanne Shute
Laura Siberry
Jeni Siegfried
Shannon Siemens Baccaglini
Lisa Marie Paul Sierk
Molly Signs-Rehmann
Victoria Silverman
Rebecca Simkin
Jill Simmons
Tara Simonetta
Susan Simons, CFRE
Cathy Simons
Nikki M Simpson
Ashli Sims
Greg Sims
Libby Singer
Dolly Singh
Mark Singsank
Helga Sirola
Andrea N. Sivells, MS
Susan T. Siwiec, APR
Anne Sixkiller
Leanne Skooglund
Liesl Slabaugh, MA
Shari Slattery
Priscilla Slaughter
Jane Sleep
Tara Slevin
Judy Slivinski
Chenay Sloan
Karen Sloan
Heather Slough
Sharon G. Smith, CFRE
Christy D Smith, CFRE
Daniel Smith
Jacob Smith, MPA
Leslie Ann Smith
Marion Smith
Pam Smith
Phyllis Smith
Vivian Trickey Smith
Zach Smith
Deborah J. Smith
Angелиk Smith
Beverly Smith, CFRE
Colleen Nicole Smith
Diane Smith
Stacey Smith
Christian N. Smith, MPA
Marc Smith
Shelly Smith, CFRE
Diane Smith
Heather Smith, CFRE
Jennie Smith, CFRE
Reverend Jay Gregson Smith, CFRE
Cheri Smith
Pamela Smith
Kelly Smith Bell, CFRE
Shelly Smith-Hines
Karrie Smyth
Lois A Smyth
Kelly Ann Snow
Brittany Snyder, BA
Sandra Snyder
Mandy Snyder
Pin Pin Song
Ashleigh Sonnenberg
Brenda Sooter, BS
Joseph Sorenson
Roberto M. Soto-Acosta
Darrel Spacone
Laurel A. Spagnolo
Tara L Spann
Deb Sparks
Bethany Sparks Kern
Laura Speer
Caroline Spencer
Dianne Spencer, CFRE
Andrew C. Spencer
Jan Spencer
Shanan Spencer-Brown, CFRE
Sara Spiess
Isazetta A. Spikes, CFRE
Melissa Spil, MSW
Jennifer Herman Spiller, CFRE
Susan Spires, CFRE
Wendi Spratt
Kathy Levy Spring, MA
Erica Spruille
Laura St. Blanc
Sandra Stack
Carl H. Stages
Nathan Dean Stallinga, CFRE
Susan Stalnecker
Tiffany Jayne Staman, CFRE
Kayleigh R Stampfler, CFRE
Jay Stark
Brandon Stec
Lyla Steenbergen, CFRE
Sara Steers
Chris Steeves
SUSAN A STEFFENS, MBA
Gary A. Steiner
Andrea Stephens
Kathryn Stephens
Nancy A Stephens
Michelle Stephens
Margaret Stephens-Reed
Lynn Stevens
Susan Stevenson
Dawn A.M. Stever, CFRE
Charles Stewart
Eric Stillman, MA, MSW
Kay A. Stine, CFRE
Lisa Stinson
Matthew P. Stinson
Marianne J Stites
Zoran Stjepanovic
JoAnn Stock, CFRE
Alyson Stoffer
William Stohlmann, CFRE
Jodi Stoken
Carter Rose Stone
Ashley Stoneburner
Meaghan Stovel McKnight
Melissa Stover
Jennifer Strain, CFRE
Lisa Strandberg
Taylor Gregory Strasser, CFRE
Maeve Strathy, BA
Rich Strehl
April Talbott Strickland
Christine M Strong, MBA, CFP
Heidi Struck
Julie Strzeletz
Elinor S. Zedaker, CFRE
Dennis Zehner
Shirley Zhou
Chris Ziemba, CFRE
Sean Zikman
Katharine Zimmerman, BA
Jessica Zimmerman
Gillian Nileene Zinck
Jane Zoellick
Leslie Zornow
Rob Zuback
Brittany Zuckerman
Julie Zumas
Marcy Zunk
Kelly Zwink

\(^c\) Denotes membership in the Champions Circle
\(^\lambda\) Denotes membership in the Leadership Society
\(^\omega\) Denotes membership in the Omega Circle
### ASSETS

<table>
<thead>
<tr>
<th>Description</th>
<th>2017</th>
<th>2016</th>
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<tbody>
<tr>
<td>Cash and cash equivalents</td>
<td>$4,824,009</td>
<td>$2,753,891</td>
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<tr>
<td>Investments</td>
<td>994,095</td>
<td>937,710</td>
</tr>
<tr>
<td>Accounts Receivable, net</td>
<td>92,529</td>
<td>371,689</td>
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<tr>
<td>Pledges Receivable, net</td>
<td>95,269</td>
<td>185,683</td>
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<tr>
<td>Prepaid Expenses and other</td>
<td>400,059</td>
<td>313,345</td>
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<tr>
<td>Inventory</td>
<td>92,767</td>
<td>108,169</td>
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<tr>
<td>Property, equipment and leasehold improvements, net</td>
<td>753,988</td>
<td>1,562,902</td>
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<tr>
<td><strong>Total Assets</strong></td>
<td><strong>$7,252,716</strong></td>
<td><strong>$6,233,389</strong></td>
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### LIABILITIES AND NET ASSETS

<table>
<thead>
<tr>
<th>Description</th>
<th>2017</th>
<th>2016</th>
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<tbody>
<tr>
<td>Liabilities:</td>
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<tr>
<td>Accounts payable and accrued expenses</td>
<td>$609,422</td>
<td>$498,809</td>
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<td>Deferred revenue</td>
<td>4,528,366</td>
<td>4,264,294</td>
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<td>Deferred rent</td>
<td>1,102,616</td>
<td>1,268,054</td>
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<td><strong>Total Liabilities</strong></td>
<td><strong>$6,240,404</strong></td>
<td><strong>$6,031,157</strong></td>
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**Net assets (deficit):**

<table>
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<tr>
<th>Description</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Without donor restrictions, as restated</td>
<td>(219,615)</td>
<td>(971,037)</td>
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<tr>
<td>With donor restrictions, as restated</td>
<td>1,231,927</td>
<td>1,173,269</td>
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<tr>
<td><strong>Total net assets (deficit)</strong></td>
<td><strong>$1,012,312</strong></td>
<td><strong>$202,232</strong></td>
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</tbody>
</table>

**Total liabilities and net assets**

<table>
<thead>
<tr>
<th>Description</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total liabilities and net assets</strong></td>
<td><strong>$7,252,716</strong></td>
<td><strong>$6,233,389</strong></td>
</tr>
</tbody>
</table>
### ASSOCIATION OF FUNDRAISING PROFESSIONALS AND AFP FOUNDATION FOR PHILANTHROPY

*Consolidated Statement of Activities*

**YEAR ENDED DECEMBER 31, 2017**

<table>
<thead>
<tr>
<th>ACTIVITIES WITHOUT DONOR RESTRICTIONS</th>
<th>2017</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue and support</strong></td>
<td></td>
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<tr>
<td>Membership dues</td>
<td>$5,800,036</td>
<td>$5,820,400</td>
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<td>Registration fees</td>
<td>3,182,691</td>
<td>2,778,309</td>
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<td>Royalty income</td>
<td>1,265,921</td>
<td>1,307,860</td>
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<tr>
<td>Advertising and sponsorships</td>
<td>646,017</td>
<td>855,230</td>
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<tr>
<td>Contributions and grants</td>
<td>612,625</td>
<td>581,531</td>
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<tr>
<td>Exhibitor fees</td>
<td>305,785</td>
<td>368,310</td>
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<tr>
<td>Miscellaneous</td>
<td>75,764</td>
<td>108,177</td>
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<tr>
<td>Sales of merchandise</td>
<td>60,000</td>
<td>86,917</td>
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<tr>
<td>Donated services</td>
<td>33,977</td>
<td>66,178</td>
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<tr>
<td>Investment return, net</td>
<td>9,111</td>
<td>6,199</td>
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<tr>
<td><strong>Total Revenues and Support</strong></td>
<td>$11,991,927</td>
<td>$11,979,111</td>
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<tr>
<td><strong>Net assets released from restrictions</strong></td>
<td>223,737</td>
<td>218,193</td>
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<tr>
<td><strong>Total Revenues and Support</strong></td>
<td>$12,215,664</td>
<td>$12,197,304</td>
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</table>

**Expenses:**

**Program services**

- Center for fundraising innovation: $2,821,841, $2,992,024
- Marketing and communications: 2,231,226, 2,326,352
- Member and chapter services: 1,599,776, 1,895,920
- Public policy, advocacy, and ethics: 522,077, 375,356
- Relevant quality education: 315,966, 305,007
- Inclusion and influence: 33,619, 30,983

**Total Program Services** $7,524,505, $7,925,642

**Supporting services**

- Management and general: 3,210,219, 3,536,551
- Resource development: 194,228, 182,478

**Total supporting services** $3,404,447, $3,719,029

**Total expense** $10,928,952, $11,644,671

Change in net assets without donor restrictions: 1,286,712, 552,633
<table>
<thead>
<tr>
<th>ACTIVITIES WITH DONOR RESTRICTIONS</th>
<th>2017</th>
<th>2016</th>
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<tbody>
<tr>
<td>Contributions</td>
<td>137,710</td>
<td>173,909</td>
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<tr>
<td>Investment return, net</td>
<td>144,685</td>
<td>35,326</td>
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<tr>
<td>Net assets released from donor restrictions</td>
<td>(223,737)</td>
<td>(218,193)</td>
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<td>Change in net assets with donor restrictions</td>
<td>58,658</td>
<td>(8,958)</td>
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<tr>
<td>Change in net assets</td>
<td><strong>$810,080</strong></td>
<td><strong>$543,675</strong></td>
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<tr>
<td>Net assets (deficit), beginning of year</td>
<td>202,232</td>
<td>(341,443)</td>
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<tr>
<td><strong>Net assets, end of year</strong></td>
<td><strong>$1,012,312</strong></td>
<td><strong>$202,232</strong></td>
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</tbody>
</table>
### 2017 CONSOLIDATED INCOME (AUDITED)

- **Membership**: 48.4%
- **Registrations (including Conference)**: 26.5%
- **Contributions, Grants & Donated Services**: 5.6%
- **Royalties**: 10.6%
- **Advertising/Sales/Other**: 13.5%

### 2017 CONSOLIDATED EXPENSES (AUDITED)

- **Management and General**: 29.4%
- **Education/Center for Fundraising Innovation**: 28.7%
- **Member and Chapter Services**: 14.6%
- **Marketing and Communications**: 20.4%
- **Public Policy and Ethics/Inclusion and Influence**: 5.1%
- **Resource Development**: 1.8%
- **Royalties**: 10.6%
- **Advertising/Sales/Other**: 13.5%
## AUDITED STATEMENT OF REVENUE AND EXPENSES
FOR THE YEAR ENDED DECEMBER 31, 2017

### AFP FOUNDATION FOR PHILANTHROPY—CANADA
FOUNDATION DE PHILANTHROPIE AFP—CANADA

<table>
<thead>
<tr>
<th>RESTRICTED FUNDS</th>
<th>DESIGNATED FUNDS</th>
<th>ENDOWMENT FUNDS</th>
<th>GENERAL FUNDS</th>
<th>TOTAL</th>
<th>2017</th>
<th>2016</th>
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</thead>
<tbody>
<tr>
<td><strong>REVENUE</strong></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td><strong>Donations</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Designated</td>
<td>$91,405</td>
<td>$50</td>
<td>$7,728</td>
<td>$99,183</td>
<td>$110,764</td>
<td></td>
</tr>
<tr>
<td>Member</td>
<td>44,621</td>
<td>0</td>
<td>82,467</td>
<td>127,088</td>
<td>127,962</td>
<td></td>
</tr>
<tr>
<td><strong>Investment income</strong></td>
<td>0</td>
<td>5,129</td>
<td>17,495</td>
<td>22,624</td>
<td>13,926</td>
<td></td>
</tr>
<tr>
<td><strong>Inclusive giving project income</strong></td>
<td>48,577</td>
<td>0</td>
<td>0</td>
<td>48,577</td>
<td>211,796</td>
<td></td>
</tr>
<tr>
<td><strong>TOTAL REVENUE</strong></td>
<td>184,603</td>
<td>5,179</td>
<td>107,690</td>
<td>297,472</td>
<td>464,448</td>
<td></td>
</tr>
</tbody>
</table>

| **EXPENSES**      |                 |                |              |       |      |      |
| **Programs**      |                 |                |              |       |      |      |
| Regional designated allocations | 58,594 | 0              | 0            | 58,594 | 58,248 |
| National designated allocations | 87,384 | 1,425          | 3,576        | 92,385 | 55,564 |
| Inclusive giving project | 48,577 | 0              | 0            | 48,577 | 211,796 |
| Translation       | 1,062           | 0              | 0            | 1,062  | 5,737 |
| Program support   | 29,687          | 0              | 0            | 29,687 | 28,528 |
| **TOTAL EXPENSES** | 225,304         | 1,425          | 3,576        | 230,305 | 359,873 |

| **Administration and fundraising** |           |                |              |       |      |      |
| Administrative support | 75         | 0              | 5,589        | 5,664 | 8,201 |
| Bank and credit card fees | 0          | 0              | 9,088        | 9,376 | 7,003 |
| Donor recognition     | 0            | 0              | 476          | 476   | 1,726 |
| Every Member Campaign | 0          | 0              | 314          | 314   | 1,641 |
| Fundraising consulting support | 0         | 0              | 23,759       | 23,759 | 16,510 |
| Meeting expenses      | 0            | 0              | 1,993        | 1,993 | 1,895 |
| Office supplies       | 0            | 0              | 669          | 669   | 280  |
| Postage and Courier  | 0            | 0              | 1,568        | 1,568 | 1,263 |
| Printing and reproduction | 0          | 0              | 1,419        | 1,419 | 475  |
| Professional fees    | 0            | 0              | 40,272       | 40,272 | 40,326 |
| Telephone and fax    | 0            | 0              | 2,553        | 2,553 | 2,396 |
| Travel               | 0            | 0              | 8,459        | 8,459 | 7,150 |
| Miscellaneous        | 0            | 0              | 246          | 246   | 20   |
| Website              | 0            | 0              | 113          | 113   | 2,737 |
| **TOTAL EXPENSES**   | 225,379       | 1,713          | 100,094      | 327,186 | 451,496 |

| NET REVENUE FOR THE YEAR | ($40,776) | 3,466 | $7,596 | ($29,714) | $12,952 |
### AUDITED STATEMENT OF CHANGES IN NET ASSETS FOR THE YEAR ENDED DECEMBER 31, 2017

<table>
<thead>
<tr>
<th>RESTRICTED FUNDS</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Designated Funds</strong></td>
<td><strong>Endowment Funds</strong></td>
</tr>
<tr>
<td>Balance, beginning of the year</td>
<td>$213,761</td>
</tr>
<tr>
<td>Net revenue for the year</td>
<td>(40,776)</td>
</tr>
<tr>
<td>Transferred</td>
<td>49,264</td>
</tr>
<tr>
<td><strong>Balance, end of the year</strong></td>
<td><strong>$222,249</strong></td>
</tr>
</tbody>
</table>
“As a pebble thrown into a lake creates ripples, so AFP touches lives and affects philanthropy in countless, unknown ways.”

—William Simms, AFP Co-founder