Lori:

Hello!

Welcome to the AFP Foundation for Philanthropy BE the CAUSE Webinar for 2023, welcoming our new foundation development chairs!
Lori

Read introductions and names

Both Ayat and I are available at any time to assist you and your chapter.

But just so you know specific roles. Ayat is the staff person responsible for the BE the CAUSE Campaign so she should be your first point of contact and who you will hear from the most.

I have overall responsibility for the Foundation including our board governance and major gifts initiatives. But am also always available to answer any questions that you may have.
The objectives of this webinar is to:

1. Tell you about the Foundation for Philanthropy
   1. What is the Foundation for Philanthropy and how is it different than AFP
   2. We want to show you the true impact of what the Foundation does
   3. We want to be clear about our fundraising priorities, as well as our methods, for full transparency while working with you

2. BE the CAUSE
   1. BTC is the Foundation for Philanthropy’s annual fund
   2. Supports so much of what we do – scholarships, grant backs, networking opportunities, professional development and more! We’ll go into detail later.
   3. BE the CAUSE is one of the priorities of Foundation Development Chairs

3. Time with Natalie Krauser with the AFP New Jersey Chapter who is here to give you tips and tricks for success!

4. Support
   1. What exactly is the role of the Foundation Development Chair?
   2. What the Foundation does all year to provide you with support, resources, content and more!
What IS the AFP Foundation for Philanthropy?

The AFP Foundation enhances philanthropy and volunteerism through programs of education, research and service that benefit all those who lead, serve and support nonprofit institutions.

Lori

1. What IS the Foundation for Philanthropy?
   1. We are an independent 501 c(3)
   2. AFP is a membership organization that is classified as a 501 (c) 6
   3. We operate in tandem but we are a purely nonprofit organization that relies on donations to make impact in our profession
   4. We do not fund any AFP operations.
   5. No membership dues are used by the Foundation
Growing Fundraising Leadership For a Better World

What does the Foundation support?

1. Leadership Development
2. IDEA (Inclusion, Diversity, Equity and Access)
3. Ethics
4. Research

The Foundation developed a new Case for Support in 2019. Through the process four priority areas were identified for the Foundation.

1. Leadership Development
2. IDEA
3. Ethics
4. Research

1. Attract and Develop Fundraising Leaders = Leadership Development. We have several leadership development initiatives that have been going for years. AFP LEAD (formerly Leadership Academy) is a Foundation-funded event. Scholarships are available through Blackbaud and Levy. We also offer a Chamberlain Scholar to every single chapter every single year so those individuals have an opportunity to attend the largest fundraising conference in the world and have educational, networking, and leadership development opportunities. We also have a new initiative, titled the Leadership Development Program that will directly address the growing issue of the Boomer generation retiring and the lack of qualified leaders in fundraising to take their places. This initiative won’t be funded through our annual fund, BTC, but through major gift
2. **Build a Stronger Sector Through a More Diverse Workforce = Inclusion, Diversity, Equity and Access.** Both AFP and the Foundation for Philanthropy have many initiatives that fall under the IDEA umbrella, and we’ll talk more about those later. Diversity Scholarships, WII mentoring.

3. **Renew Public Trust in Charitable Organizations = Ethics.** Hopefully, you have heard of AFP Ethics Awareness Month that the Foundation helps to fund, largely through endowment funds. Skystone, Levis Grants and FEP. Research Council moved to the Foundation in 2022.

4. **Support Research on Critical Issues in Fundraising = Research** that supports the fundraising profession, such as FEP, which is vital data that helps all of us in the fundraising profession.
Lori:

Our Case for Support – 4 strategic pillars
Our Fundraising Priorities

• BE the CAUSE: our annual fund
• Major Gifts: one example is our Leadership Development program that is being created
• Endowments: to fund scholarships and programs in perpetuity

Lori:

The Foundation has three primary methods of raising funds.

- BTC is our annual fund and we truly rely on help from our FDC’s to achieve our goals.
- Major Gift initiatives help to fund things such as the Leadership Development Program that was mentioned earlier. Another note about the LDP: the creation of the program was in direct response to member needs, chapters involved, summit, launching program
- Endowments help fund scholarships, Ethics Month, and other areas like ICON, LEAD, Ethics
What is BTC and what does it impact?

- Scholarships: over 226 were given out in 2022 alone! We support young professionals, diverse fundraisers and many more
- Foundation Grant Back Program: a portion of the funds raised goes DIRECTLY back to your chapter – so you can make an impact in your community while also supporting the entire profession

Lori

BTC – why is it important to support this campaign? BTC supports both your local communities, while also supporting the entire profession.

It’s important to us to reward all of your hard work, so we ensure that a portion of BTC funds raised go directly back to your chapters to provide local impact. But, you’re also part of a global profession, and BTC elevates that profession through scholarships and other programming.

Our annual fund
- Supports scholarships -- over 226 in 2022! (read slide)
- Supports Grant Back program (read slide)
- We’ll go into greater detail about these later
2022 the CAUSE Campaign Highlights

$352,240 raised in 2022

Thank you all for a successful year!

Lori

$1,170,197 overall for the Foundation in 2022 (119% of goal) which includes in kind support of $237,500. (Celebration slide!) Despite all of the challenges in 2022, thanks to all of you and the partnership with have with our chapters, we were able to hit our goal.

This was down 10% from 2021, follows the FEP trends.
Lori

You can see here some of the funding that the Foundation provided last year. A large portion of funds went back to chapters to provide services in local communities and the other majority was for scholarships.

Further along in our orientation we will explain how your chapter can receive your grant back in 2023 for your 2022 efforts.
Foundation’s Impact Statement

We keep this constantly updated and on our website for you to use whenever you need information, graphics, or content to send out! Please feel free to download and utilize.
Where will your gifts go in 2023?

• Supporting key programs and initiatives:
  • Scholarships
    - Chamberlain
    - Diversity
    - Collegiate
  • AFP LEAD (formerly Leadership Academy)
  • Women’s Impact Initiative ongoing efforts
  • Emerging Leaders Program
  • Growth in Giving Initiative
  • Local chapter initiatives

Lori

I know that it is very important that you have a case for support as you ask your chapter members to consider giving to the AFP Foundation. I already mentioned these items, but I think it is worth repeating.

BE THE CAUSE DONOR DOLLARS GO TO THE FOLLOWING

Scholarships to the AFP International Conference (Chamberlain and Diversity)
AFP LEAD
Research – which includes the Growth in Giving Initiative and Fundraising Effectiveness Project (FEP)
Women’s Impact Initiative and ongoing efforts
Emerging Leaders Program
Local chapter initiatives
Ayat:

All chapter leaders should have received an email from me in early February with your chapters new 2023 proposed low and high goals, a copy of your chapters 2022 chapter tally report, and a 2022 Grant Back form.

The Grant Back program is a grant that is given back to the chapters based on their low and high goal as well as 100% Board participation of the prior year. Every participating chapter receives either 15, 25, or 35% back of the BE the CAUSE dollars raised in the previous year.

This grant is to be used to fund chapter activities like Education, scholarship, National Philanthropy Day activities, Youth in Philanthropy programs, Diversity programs, Mentoring programs, or any activities that will advance ethical and effective fundraising.
Ayat:

Everything you need to have a successful 2023 BTC campaign year can be found on the BTC tool kit. (Click)

Here you will find information on the foundation like our impact statement, our code of ethics, donor bill of rights, and FAQ.

You will also find all gift/pledge forms like the chapter IMPACT form, the BTC form, and the 100% Board participation form.

Under the BE the CAUSE Campaign Materials title you will see here a link that shows you how to access your chapters tally report, the Foundations important dates and deadlines, our giving levels, as well as the Donor Pin Order form which the Foundation provides for free to the chapters.

The Toolkit has a wealth of information for everything you need to know so I highly recommend bookmarking this site.
Ayat

On March 7, AFP will launch a new database. We are undergoing this transition to better serve you as a professional fundraiser and AFP member.

Beginning March 3rd, through March 7, we will have a data freeze, and we will not be able to accept online gifts or process any gifts/pledges.

If someone wants to make a gift during this time, they can either use the Give by Cell or call me at 703-519-8448.

Our go live date to our new Database is on March 7th.

After that date, you will access your Chapter Tally Report in a different way.

On March 6 or 7, all AFP members will receive an email with subject line “Welcome to Salesforce: Verify Your Account” that you must click through to verify your account. Until you verify your account, you will not be able to access your AFP member account.
You have 7 days to take action on this email upon receipt, after which you will need to manually request a new email to verify your account.

Only one person per chapter will have access to the chapter portal...adding additional access to the chapter portal will be discussed after the launch in March.

Until March 6th you can access the Chapter Tally Reports like you have been.

There was a webinar on February 16th going into more detail on the new look of the reports. The recording can be found **in the Chat**
Need to add link to training
Ayat Hassan, 2023-02-21T15:24:29.393
How does the Foundation support your work?

- Donor Acknowledgment Policy
- Stewardship
  - Gift processing/thank you letters
  - Pledge reminders
  - Renewal letters
  - Donor Pins
- Catapult Calling Program
- Text to Give

Text AFP to 571-749-2699

Ayat:

Just a few things that the foundation does to support you and your chapter:

We handle gift processing and acknowledgement
We send pledge reminders
We send renewal letters
As stated in the previous screen we also Provide donor pins and much more

The Catapult calling programs is an in kind gift from Catapult Fundraising. They called 4,000 lapsed donors from 2021-2022, this started last October and was just completed last week. All gifts made in 2022 were credited to the 2022 BTC Campaign, and those gifts made in 2023 are being credited to the 2023 BTC Campaign.

Give by Cell will continue partnering with us by providing a mobile giving platform to the Foundation for mobile giving all year long. TEXT AFP to 571-749-2699
What Can You Do for Your Donors/Prospects?

• Virtual donor reception
• Thank you emails to donors each month
• Engage board members to personally solicit members to make/upgrade gift
• Identify Chamberlain scholars in your chapter: what was their experience? How has it impacted their careers? Are they a donor?
• Create a communications calendar about BTC so you have consistent communications (highlight ICON/LEAD matching campaigns!)
• Solicit your chapter board for 100% Board Participation (10 Star!)
• Ask us to Zoom in to a board meeting to talk about the Foundation and our impact

Ayat

What Can You Do for Your Donors? Here are some suggestions that have been discussed by the AFP Foundation for Philanthropy Fundraising Board.

Read the slide
Natalie Krauser, CFRE– has been the Foundation Development Chair for the AFP New Jersey Chapter for several years and she served on the BE the CAUSE Committee for the Foundation for Philanthropy. She will share some tips that worked well for her and her chapter.
AFP-NJ: 2022 Be the Cause Campaign

- **Review**
  - Past activity: emails, phone calls, website content; social media

- **Refresh**
  - Personal outreach to past Chamberlain Scholars
    - Requested a bio, headshot and testimonial / impact quote
    - Developed new content featuring the most recent scholar
      - Utilized segmented emails (existing donors, lapsed donors & members) and through the generosity of our chapter partner, Catapult, and incorporated into update calls

- **Reframe**
  - **Who?**
    - AFP-NJ Members
  - **What?**
    - The wide variety of programming and activities supported by BTC
  - **Why?**
    - Because professionals thrive and succeed with access to continuing education, learning / maintaining an ethical code and involving diversity of thought, experience and talent
  - **How?**
    - Educated on the shared collaboration including the percentage give-back by AFP Global
**AFP-NJ: 2022 Be the Cause Campaign**

### Results

**Be the Cause Total Giving**
- 2020: $10,105
- 2021: $7,592
- 2022: $8,070

**Be the Cause Total Donors**
- 2020: 50
- 2021: 44
- 2022: 56
Lori
The Foundation has continued partnerships with four prestigious organizations that will help you run your BE the CAUSE Campaign at the chapter level.

A special thank you to Blackbaud for partnering with the AFP Foundation. This year, we are thrilled to announce they are continuing their support and the Good Takeover Challenge will provide a $10 match to the first 1,000 donors who give a gift of at least $20 during the three days of ICON.

Just like last year, we will send out an all-member email about the match, on the first and third day of ICON.
Thank you!

For partnering with the AFP Foundation for Philanthropy for the match over the dates of AFP LEAD, October 19-21, 2023
In Philadelphia, PA

Lori
We have also secured a match for AFP LEAD, which works similarly over the dates of LEAD, Oct 19-21 and that one is brought to you by Hazen/HILT.
Lori

As Ayat mentioned, Catapult provides in kind support by calling 4,000 lapsed donors annually.

Give by Cell provides in kind support by offering the mobile giving platform to the Foundation for Philanthropy.
We’re here to support you!

Lori Gusdorf, CAE, Executive Vice President
(800) 666-3863, ext. 449 or (703) 519-8449
Lori.gusdorf@afpglobal.org

Ayat Hassan, MBA Foundation Development Specialist
(800) 666-3863, ext. 448 or (703) 519-8448
Ayat.hassan@afpglobal.org

Lori
And we have two staff in the foundation that you will work with throughout the year.
Lori
Ayat
Lori

Facilitate any questions.

When done, thank everyone for taking on this leadership role for AFP.