



BE the CAUSE Webinar 2023



AFP Foundation for Philanthropy

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Lori:

Hello!

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

Foundation Development Chair Orientation



• Presented by:

- Lori Gusdorf, CAE, Executive Vice President, Foundation Staff
- Ayat Hassan, MBA Fundraising & Database Analyst Associate, Foundation Staff
- Natalie Krauser, CFRE, AFP New Jersey Chapter Foundation Development Chair

February 23, 2023

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.

Orientation Objectives



- What is the AFP Foundation for Philanthropy?
 - Impact
 - Fundraising priorities
 - Campaigns
- BE the CAUSE: Foundation's annual fund and our fundraising priority!
 - What IS it?
 - What does it do?
 - How does it impact you?
- Tips and tricks from a fellow Foundation Development Chair
 - Natalie Krauser, CFRE
- Resources, responsibilities, and raising funds

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Lori

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.

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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

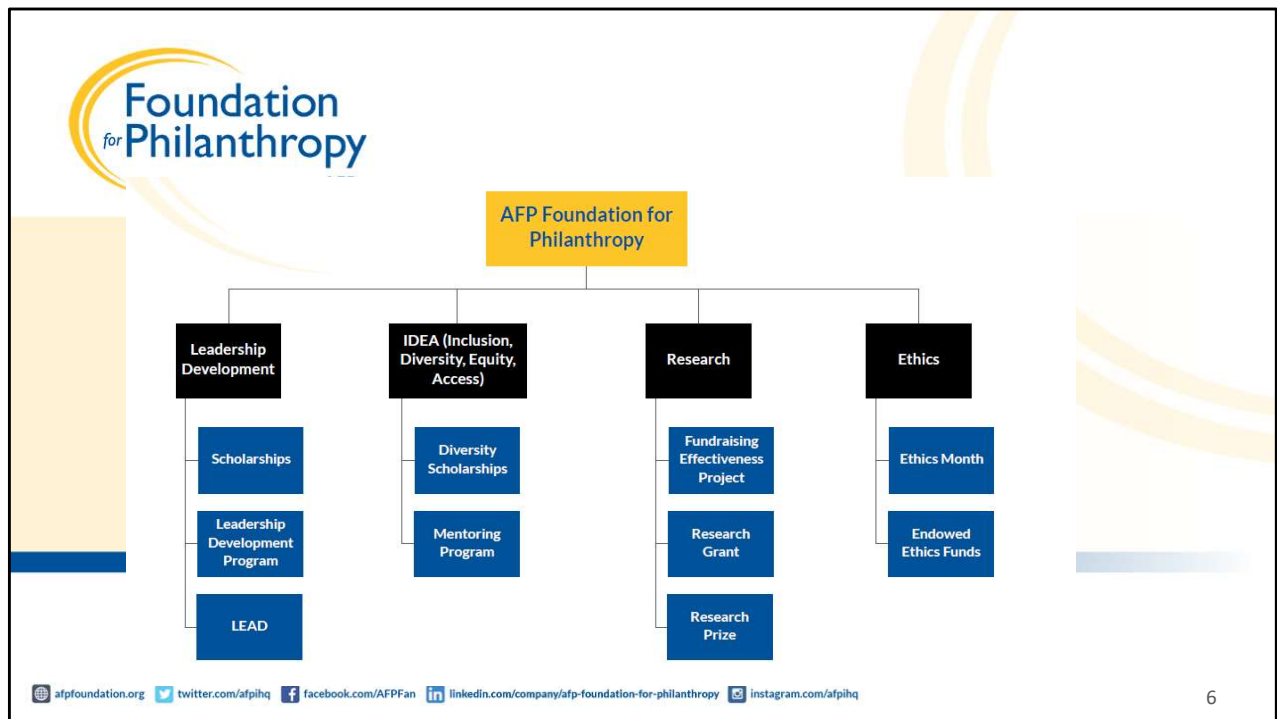
Lori

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

efforts.

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.

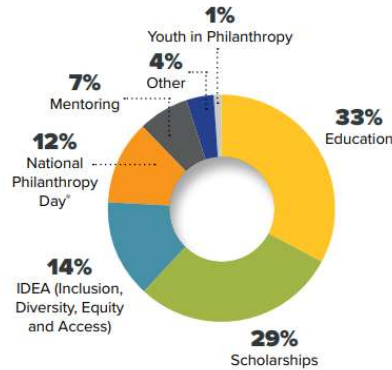
This was down 10% from 2021, follows the FEP trends.

Your 2022 Gifts Helped Support



\$73,095 in support back to 104 local chapters for:

- Education: 23%
- Scholarships: 40%
- NPD: 15%
- YIP: 1%
- Diversity: 12%
- Mentorship: 2%
- Other: 6%



\$92,045 in awards for scholarships

- 89 Chamberlain Scholars (first-time conference attendees to the AFP International Conference on Fundraising)
- 43 Diverse Communities Scholars to the AFP International Conference on Fundraising and LEAD
- 23 Collegiate Scholars funded by Marjorie K. & Stephen M. Levy
- 45 Scholarships for AFP LEAD

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



AFP U.S. Foundation for Philanthropy Advancing philanthropic investment and impact in the nonprofit sector.



The AFP Foundation for Philanthropy champions philanthropy and volunteerism by developing the nonprofit sector's current and future leaders, welcoming diverse new voices into the charitable world and rigorously upholding the highest standards of ethics.

Leadership Development

Chamberlain Scholarship Program

In 2022, **108** Chamberlain Scholars attended AFP ICON. Since the program began in the year 2000, we have awarded **2,638** Chamberlain Scholarships.

Diversity Communities Scholarship Program

In 2022, **23** Diverse Communities Scholarships were awarded to attend AFP ICON. That makes **207** since the program began in 2012.

Collegiate Scholarship Program

In 2022, **10** collegiate scholars attended AFP LEAD through the generosity of the Marjorie K. and Stephen M. Levy Philanthropic Professional Education Fund. A total of **121** scholars have been awarded through this fund since 2017.

Women's Impact Initiative

Through the AFP/Alford Group Women's Mentoring and Leadership Development Program **19** scholarships were provided to ICON 2022.

Blackbaud Diversity Fund

The Foundation for Philanthropy's ongoing partnership with Blackbaud, and our shared commitment to IDEA (Inclusion, Diversity, Equity and Access) has led to the creation of the Blackbaud Diversity Fund. The fund offers diversity-based scholarships for both ICON and LEAD. In 2022, **16** scholarships were awarded to ICON and more than **50** have been awarded to LEAD.

Since its inception, the fund has provided more than **130** scholarships to fundraising professionals from diverse backgrounds.

AFP LEAD

AFP LEAD held in Houston, Texas on October 20-22, 2022 is brought to you by the AFP Foundation for Philanthropy and provides relevant training on leadership development for fundraising professionals that helps them move into senior positions in the nonprofit sector.

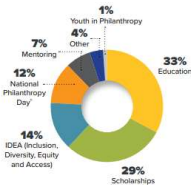
"A heartfelt thank you for providing me with the opportunity to be a Chamberlain Scholar. Because of my attendance, I walked away with lots of knowledge and ideas that will further our mission here at Girls on the Run. It was also invaluable to connect with so many other fundraisers and build a better understanding of our collective profession. Being from a small shop, this was particularly meaningful!"
Taryn Frazier, Development Director, Girls on the Run Atlanta

AFP U.S. Foundation for Philanthropy Advancing philanthropic investment and impact in the nonprofit sector.

Chapter Partnership Grants & BE the CAUSE

In partnership with AFP Chapters, the AFP Foundation for Philanthropy conducts BE the CAUSE—our annual fundraising campaign. A portion of the funds raised are granted back to chapters for programs and services in their local communities.

In 2022, the Foundation has granted **\$76,094** back to **96** chapters. The funds were used for the following purposes:



Research and Endowments

Skystone Partners Research Prize: "In Defence of Philanthropy" written by Dr. Beth Broeze.

Donald A. Campbell, Jr. Scholarship Fund provided 5 scholarships to attend AFP ICON.

Maurice Gurn Endowment supported the AFP ICON closing plenary speaker Zainab Salbi.

Funds from the Marjorie K. and Stephen M. Levy Philanthropic Professional Education Fund provided collegiate scholarships and AFP LEAD programming.

Ron & Pam Carroll Endowment funded a scholarship for a chapter leader from Egypt to attend AFP LEAD.



Thank you for making a difference with your generous donations!

Lori Gusdorf, CAE, Executive Vice President
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"The Blackbaud Diversity Scholarship allowed me to learn new best practices, grow professionally, and to network with other passionate fundraisers."

Josuel E. Hernández, MA, CFRE
Annual Fund & Donor Groups Manager,
Huntington Health

Lori

Foundation for Philanthropy'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

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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



BE the CAUSE Grant Back Program

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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



2023 BE the CAUSE Resources and Tool Kit

<https://afpglobal.org/USFoundation/be-cause-campaign-toolkit#toolkit>

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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.



Database Conversion

- Data Freeze from March 3rd-March 6th
 - No Gifts/Pledges can be made online
 - Give by Cell: Text **AFP** to **571-749-2699**
 - Call us at 703-519-8448
- Go live date March 7th
- New way to access the Chapter Tally reports

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**

Slide 15

AH0

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



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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



Foundation
for Philanthropy
AFP

Natalie Krauser, CFRE

- AFP New Jersey Chapter
- Foundation Development Chair

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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



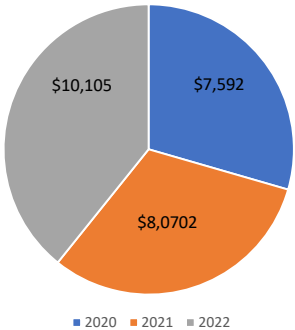
- Review
 - Past activity: emails, phone calls, website content; social media
- Refresh
 - Personal outreach to past Chamberlain Scholars
 - Requested a bio, headshot and testimonial / impact quote
 - Developed new content featuring the most recent scholar
 - Utilized segmented emails (existing donors, 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

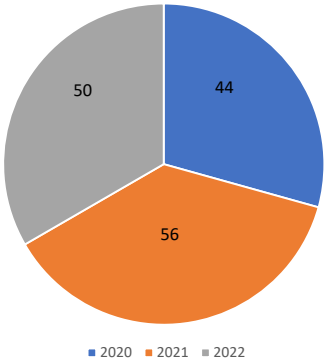


Results

Be the Cause Total Giving



Be the Cause Total Donors



A special thank you to...



For partnering with the AFP Foundation for the "Good Takeover New Orleans, LA:

April 16-18: Dates of the Good Takeover Challenge Match

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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!



hazen institute for
leadership training

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

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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.

In Kind Support Provided by



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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.

AFP Foundation Staff



We're here to support you!

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Lori

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

Lori

Ayat



Open Discussion

Lori

Facilitate any questions.

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