

Giving Back to the Profession



About 30 years ago, I was able to attend my first AFP International Conference because I was awarded a Chamberlain Scholarship. I was new to the profession and this scholarship made it possible for me to attend and soak up as much information and meet as many people as possible. As I look back on that opportunity, I am grateful to the AFP Foundation for Philanthropy for providing the scholarship that set my career in motion. I became active on the board of my Washington State chapter, built my network, joined the national membership and diversity committees and relied on the educational programs and resources of AFP. I owe my career to AFP.

The Steward

As AFP is celebrating its 60th Anniversary, we are pleased to bring back *The Steward* as a vehicle to honor and thank you for your support of the **AFP U.S. Foundation for Philanthropy**. For me personally, I am especially grateful and honored to serve as the chair of your board at a time when AFP is working on a leadership development curriculum that will be implemented in 2021.

In partnership with AFP global leadership, the Foundation and Association boards have been focused on one of the most pressing needs in our profession—leadership development. Research indicates that over 80,000 jobs per year are expected to open in nonprofit leadership over the next 10 years! Our pipeline of highly trained and experienced professionals ready to move into these positions is limited.

Who better than AFP to take a leadership position to address this challenge? We have nearly 32,000 members from all levels of experience, with over 50 percent having served in the profession of fundraising for 10 years or more. Last summer, the Foundation hosted a Leadership Development Summit with 30 nonprofit leaders, funders, chapter leaders and other experts to discuss what will be needed to develop a robust curriculum around preparing our members interested in pursuing deeper and more useful leadership training.

The Role of YOUR Foundation for Philanthropy

The role of the Foundation is to support leadership initiatives developed by AFP Global, provide scholarships, support diversity, important research and promote ethics in our profession.

Last year, the foundation completed a new case for support. We have established four key priority areas to be supported through your gifts to the foundation.

1. **Attract and develop fundraising leaders** by supporting **leadership training** opportunities to help seasoned fundraisers take their work to the next level and sustain the **Chamberlain Scholarship** program—a vital gateway for many fundraisers to learn and ultimately become leaders in our sector
2. **Support research on critical issues in fundraising**, such as the Fundraising Effectiveness project that tracks giving and provides tools on donor retention. The foundation supports additional research that is relevant to the sector
3. **Build a stronger sector through a more diverse workforce**, by addressing the needs of diverse fundraising professionals through the **AFP Inclusion, Diversity, Equity and Access (IDEA)** program, expanding **diversity scholarships**, and partnering with other diverse professional organizations to develop stronger **educational programs** and build leadership skills
4. **Renew public trust in charitable organizations**, by positioning AFP as a thought leader around ethical issues with media and watchdog groups; raising awareness of AFP's strong **Code of Ethics**, improving and expanding training and through advocacy around regulatory and policy changes at the federal level to encourage the widespread use of the Code of Ethics within the social impact sector

Your Gift Makes a Difference

Last year, your support made it possible for over 150 people to attend the international conference through the Chamberlain, Diversity and Collegiate scholarships. The Foundation presents the AFP LEAD conference in the fall where approximately 400 chapter leaders and professionals gather to build their leadership skills. This past year, gifts to the foundation also supported the Women's Impact Initiative Summit. Through our **BE the CAUSE** annual fundraising campaign, the foundation granted nearly \$100,000 back to 113 AFP Chapters to support programs and services in local communities.

Building for the Future

As chair, my goals for 2020 include increasing the capacity of the AFP US Foundation for Philanthropy to build upon current priorities and to put plans in place for a major campaign that will significantly increase the impact we can make on building future leaders for our sector! Thank you for joining me!

Karen Rotko-Wynn, CFRE, Executive Vice President and West Division Manager, The Alford Group, Seattle, WA and Chair of the AFP U.S. Foundation for Philanthropy

A Check-In with Former AFP President & CEO Paulette Maehara



Paulette Maehara served as AFP president and CEO from 1998–2011 during which she took the organization through a name change, from the National Society of Fundraising Executives (NSFRE) to the Association of Fundraising Professionals (AFP). Other accomplishments she was most proud of was the creation of an International Statement of Ethical Principles in Fundraising, a universal code of ethics used by some 25 countries and the membership growth and expansion outside of the U.S. Maehara joins the AFP Foundation for Philanthropy Champion's Circle in 2020 and designates a portion of her gift toward a scholarship for an international attendee at the association's international conference, AFP ICON.

Why are scholarships for the next generation important? I believe that scholarships afford the recipient the opportunity to expand his or her knowledge of fundraising and to meet and learn from peers. Some organizations do not or cannot provide training funds for their fundraising staff, and scholarships are a wonderful way of giving people an opportunity to learn.

Why do you think having international fundraisers are vital to the fundraising sector? We live in a global world, and I believe it is critically important that we learn from diversity of thought and practice. Social media in all forms has made the world a much smaller place for donors and fundraising professionals.

What motivated you to give now? I have always supported AFP during my tenure as president and CEO and into retirement, and when I learned that there was a new giving program it seemed the right thing to do.

What do you see as the current challenges for the profession and the nonprofit sector? There are many challenges for the nonprofit sector as a whole, including the expanding use and abuse of social media as a fundraising tool, changing donor demographics and continuing growth of the fundraising profession to name a few.

How do you think the foundation is leading this charge? It is my hope that the AFP Foundation will continue to provide support for educational programming, scholarships for young professionals and expanding AFP's reach globally.

As you reflect back upon your time as AFP President & CEO, what changes have you seen since then? The continued growth of the nonprofit sector, increased compliance requirements and global scrutiny of the nonprofit sector are key changes for me. In addition, donors have more tools at their disposal, like social media and the Internet, to become more informed about the sector and the specific nonprofit they are interested in supporting. I am confident that AFP will continue to grow and meet the challenges of the future.

Paulette Maehara, FASAE, CAE (Ret), Bluffton, SC

Murray Discusses Transformative Fundraising Career and Importance of Giving Back to the Profession

Colette Murray, JD, CFRE is an esteemed fundraising professional and past chair (2003–2004) of the Association of Fundraising Professionals. Possessing a long history of leadership within the charitable and nonprofit sectors, Murray has not only dedicated herself to her work, but is committed to giving back to the profession that has offered her so much.



Recognized as a member of the Omega Circle by the AFP Foundation for Philanthropy, Murray is passionate about the work she's done, her involvement with AFP and ensuring future industry leaders have the resources necessary to enact vital change across communities around the world.

Diving deeper into her involvement with AFP, the Colette M. Murray Fellows Scholarship was established by the AFP CA, San Diego Chapter to honor Murray and as an outreach initiative that encourages diversity within the fundraising profession. The initiative works to support those fundraisers from diverse communities, encouraging involvement with the AFP San Diego Chapter, AFP Global and the profession itself.

"While we have a general gift set aside for the AFP Foundation for Philanthropy, I also support the Fellows Scholarship program created by the AFP San Diego Chapter," mentioned Murray. "Every year they bring in three or four new fundraisers of diverse backgrounds. I'm so proud of that, and I can tell you what really excites me is that some of the recipients of that scholarship, like the past president of the chapter, entered the profession because of it. The last few years, a reception was hosted for all of the Murray Fellows, and this year about 20 of them showed up. To see them grow—that's the diversity we need in the field, and it's why I do what I do. You see it and reap the rewards, and it makes you feel really good."

Possessing more than 50 years of experience in the charitable and nonprofit sectors, Murray began as a volunteer. She worked to create the University of California Berkeley Foundation and volunteered to raise money for the organization. Transitioning from this position, Murray was then recruited to

serve the California Alumni Association. Although serving as an executive director of alumni, her strong pull toward fundraising eventually lead her to work as the head of advancement for the University of California, this time on the Santa Cruz campus.

Notably, Murray also held leadership positions at the Council for Advancement and Support of Education, as well as the Association for Healthcare Philanthropy, a unique honor to carry within the fundraising profession. But, while Murray is honored to have represented and actively work with such outstanding groups, she always ends up at the center of the profession—AFP. She was awarded the AFP Founders' Medallion in 2013 for her service to the association.

"I always felt at the heart of it all," said Murray. "I loved CASE and I loved AHP, but the heart of it, AFP, is where I was trained. Learning about ethics and working with professionals across the field, I've always looked at AFP as the base and have always been active."

Transitioning from her work as a fundraiser, Murray currently serves as CEO for Paschal-Murray Executive Search, where she works to advance the fundraising profession ethically and effectively through talent recruitment. Murray is also passionate about enforcing the mission of the AFP Women's Impact Initiative across her firm, focusing heavily on leveling the playing field for women within the sector.

Murray believes in generously providing resources to the profession that allowed her to carry such incredible achievements. She continues to actively involve herself with local AFP chapters as well, serving as a voice and leader for future generations of fundraising professionals.

"I love AFP," said Murray. "It's such a broad base of professionals. When I look at my profession, I've loved what I've done, I love being a fundraiser, I love being involved in executive searching, and it's all because of the [fundraising] industry."

Colette Murray, JD, CFRE, Chief Executive Officer, Paschal-Murray Executive Search, Wilmington, NC

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Bridging the Divide Between Diversity and Professional Development

The Association of Fundraising Professionals strives to carry a global presence, advancing ethical and effective fundraising worldwide and addressing diversity among the profession. These issues are critical for Emilio Alonso-Mendoza, JD, CFRE, long-time AFP member who strives to address diversity within the charitable sector, working hand-in-hand with AFP.

A new Champion Circle donor and respected voice among the profession, Alonso-Mendoza is bringing these topics forward through generous scholarship opportunities to encourage and support future generations of diverse fundraising professionals. Specifically, Alonso-Mendoza is providing a Diverse Communities Scholarship to a Hispanic fundraising professional to attend the AFP International Conference on Fundraising.

Alonso-Mendoza, who feels education is vital for success, works to ensure diversity and learning are integrated, in which fundraisers not only discover their identity, but also have the tools and resources necessary to further their careers and find their place among the profession.

"Everybody talks about having a seat at the table, but what table and what seat?" said Alonso-Mendoza. "People need to know where they are grounded before they can rise. Knowledge is the key and having the knowledge to develop a robust fundraising plan can be a vital tool to success."

Alonso-Mendoza has been involved with AFP since the beginning of its international and diversity programs more than 30 years ago, working to address the importance of diversity among the charitable sector. Originally

from Cuba, Alonso-Mendoza works to bridge the divide between diversity and professional development not only through scholarship support, but through mentoring as well.

"It's so gratifying to see fundraisers discover their identity and how it fits into their fundraising role," mentioned Alonso-Mendoza. "When I started out, I was told that certain aspects of my identity—like my accent or being a lively and energetic speaker—were not always positive and didn't present well professionally. To be able to talk with someone and share my experiences to help them embrace their cultural identity within the fundraising profession is a great feeling. I value the generous sharing of knowledge from people who were more advanced in this career than I, and I have made an effort to give back the same way, mentoring younger fundraisers along my journey. AFP has always made a great effort to be inclusive and to provide an opportunity for people to share knowledge of our field from all around the globe."

Alonso-Mendoza, currently CEO of the Alexander Graham Bell Association for the Deaf and Hard of Hearing, hopes that at this point in his career, he can continue to inspire and encourage future generations of professionals, and practice what he preaches to fulfill the responsibility of helping others.

Emilio Alonso-Mendoza, JD, CFRE, Chief Executive Officer, Alexander Graham Bell Association for the Deaf and Hard of Hearing, Washington, DC



Giving Back to the Profession through Legacy Giving



Unless you're a young professional or just starting out in fundraising, you've probably considered the type of legacy you want to leave behind.

For Joshua Marshall, MBA, CFRE, supporting the fundraising profession is integral to his legacy, and choosing to support the fundraising community and AFP through a legacy gift was an easy decision, even at such a young age.

"Legacy giving is a unique giving option," said Marshall, who is 38 and president of MCR West Ltd. "It gives people an opportunity to do a few things. First, not all assets are liquid, and legacy giving allows a donor to give a gift when assets are made liquid. Second, as a man with a young family, I am still building an asset base from which to give. A gift in my will leverages life insurance policies and the cash that is distributed in the case of an unforeseen accident, illness and/or death. Last, a gift in an estate says—with the volume of a bullhorn—that you, as a charity are important to me. Important all the way through my life and when I have no more breath."

At a basic level, legacy gifts—or planned gifts—allow individuals to make a substantial contribution upon their passing. Such gifts can positively impact organizations from a financial standpoint, aiding in their growth and viability and

ultimately supporting their beneficiaries. As a result of these gifts, budget surpluses are not uncommon.

Marshall feels that on a personal level, legacy gifts are an indication of the depth of commitment a donor has toward a charity, regardless of age. He is passionate about supporting the future of the profession through AFP and the AFP Foundation for Philanthropy – Canada.

"As a person who cares deeply for the profession, charities, beneficiaries and donors, I feel a legacy gift speaks for my heart," said Marshall. "As a fundraising professional I am committed to the ever-growing improvement of the quality of education and training, research and dedication to ethics and inclusion."

Marshall hopes to inspire others to consider legacy gifts by sharing his own story and engage young professionals to give back to the charitable sector and the organization that continues to support it—AFP.

Joshua Marshall, MBA, CFRE, President, MCR West Ltd., Vancouver, BC

Foundations Recognize 2019 Awards at ICON

The AFP Foundations for Philanthropy recognize chapters for the wonderful support and partnership they provide all year long in conducting their annual campaigns: BE the CAUSE (U.S.) and Every Member Campaign (Canada). The following awards were presented during the 2020 AFP International Conference on Fundraising at the Chapter Presidents Council meeting. Congratulations to all of the chapters!

Chapter Grouping I: (15–50 members)

- Overall Giving: AFP MN, Southern Chapter (\$1,930)
- Participation: AFP FL, Nature Coast Chapter (58.33%)
- Increased Participation: AFP PA, Allegheny Mountains Chapter (33% Increase)
- Chapter Impact Campaign: AFP ON, Canada South Chapter (\$700)

Chapter Grouping II: (51–100 members)

- Overall Giving: AFP NV, Las Vegas Chapter (\$3,739.99)
- Participation: AFP IL, Rockford Area Chapter (46.43%)
- Increased Participation: AFP NV, Las Vegas Chapter (14% Increase)
- Chapter Impact Campaign: AFP VA, Shenandoah Chapter (\$680)

Chapter Grouping III: (101–250 members)

- Overall Giving: AFP FL, Central Chapter (\$10,000)
- Participation: AFP AR, Northwest Chapter (37.95%)
- Increased Participation: AFP WI, Northeast Chapter (21% Increase)
- Chapter Impact Campaign: AFP FL, Central Chapter (\$5,000)

Chapter Grouping IV: (251–400 members)

- Overall Giving: AFP AB, Calgary Chapter (\$13,025)
- Participation: AFP QC, Quebec Chapter (\$21%)
- Increased Participation: AFP TX, Greater Austin Chapter (4.39% Increase)
- Chapter Impact Campaign: AFP CA, Orange County Chapter & AFP New Jersey Chapter (\$5,000)

Chapter Grouping V: (400+ members)

- Overall Giving: AFP ON, Greater Toronto Chapter (\$45,406)
- Participation: AFP WA, Advancement Northwest Chapter (26%)
- Increased Participation: AFP DC, Washington DC Metro Area Chapter (5% Increase)
- Chapter Impact Campaign: AFP TX, Greater Houston Chapter (\$10,000)

Foundations Make Strides in 2019

The AFP Foundations for Philanthropy experienced fundraising success in 2019. The BE the CAUSE Campaign for the U.S. Foundation raised \$389,381, a 2.5% increase over the year before. The AFP Canada Foundation raised \$119,316 through its Every Member Campaign. In the area of major gifts the U.S. Foundation raised \$423,247 and the Canada Foundation raised \$110,150.

Thank you very much to all the donors who contribute to the AFP Foundations for Philanthropy. Your gift makes a difference for the fundraising profession.

2019 DONOR LIST

Chairman's Club (\$25,000+)

Advancement Resources
Alford Group, Inc. (Multi-Year Commitment)
Association of Fundraising Professionals
Catapult Fundraising Inc. (In Kind)

Investor's Club (\$10,000–\$24,999)

A.K.A. New Media Inc. (In Kind)
Blackbaud
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Robert & Marion Pierpont
Strategic Communications Inc. (In Kind)

Founder's Club (\$5,000–\$9,999)

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AFP GA, Greater Atlanta Chapter
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National Philanthropic Trust
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AFP AZ, Southern Chapter
AFP BC, Greater Vancouver Chapter
AFP CA, Golden Gate Chapter
AFP CA, Silicon Valley Chapter
AFP CT, Connecticut Chapter
AFP FL, First Coast Chapter
AFP FL, Tampa Bay Chapter
AFP MN, Minnesota Chapter
AFP MO, St. Louis Regional Chapter
AFP NH, Northern New England Chapter
AFP NY, New York City Chapter
AFP OH, Central Chapter
AFP OH, Greater Cincinnati Chapt
AFP OH, Northeast Ohio Chapter
AFP PA, Greater Philadelphia Chapter
AFP QC, Quebec Chapter

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 AFP FL, Southwest Chapter
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 AFP KY, Greater Louisville Chapter
 AFP LA, Greater New Orleans Chapter
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 AFP MD, Maryland Chapter
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 AFP NC, Western Chapter
 AFP NE, Nebraska Chapter
 AFP NF, Newfoundland & Labrador Chapter
 AFP OH, Greater Dayton Region Chapter
 AFP OH, Northwest Chapter
 AFP OK, Oklahoma Chapter
 AFP ON, Canada South Chapter
 AFP ON, Golden Horseshoe Chapter
 AFP OR, Oregon & SW Washington Chapter
 AFP PA, Eastern Chapter
 AFP PA, Western Chapter
 AFP SC, Piedmont Admin
 AFP TX, Fort Worth Metro Chapter
 AFP TX, Greater Austin Chapter
 AFP TX, San Antonio and South Texas Chapter
 AFP VA, Central Chapter
 AFP VA, Shenandoah Chapter
 AFP VA, Tri-State Chapter
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 AFP IL, Rockford Area Chapter
 AFP IN, Indiana Chapter
 AFP IN, Northeast Chapter
 AFP KS, Greater Wichita Chapter
 AFP LA, Baton Rouge Chapter
 AFP Mexico, Monterrey Chapter
 AFP MI, Greater Detroit Chapter
 AFP MI, West Chapter
 AFP MO, Central Chapter
 AFP MO, Greater Kansas City Chapter
 AFP NC, Triad Chapter
 AFP NC, Triangle Chapter
 AFP NV, Sierra Chapter
 AFP NY, Western Chapter
 AFP OH, Greater Cleveland Chapter
 AFP PA, Berks Regional Admin
 AFP PA, Berks Regional Chapter
 AFP PA, Central Chapter
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