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The Many Faces of Fundraising

By Dr. Lilya Wagner, CFRE, Director, PSI, and Dr. Halvard B. Thomsen, Assistant to the President, Adventist Risk Management
As a fundraising professional, I have found that some Bible stories provide great insight into the principles of fundraising. One of the best examples is found in 1 Chronicles 29:1–17, where David outlines his donations to the building of the temple because “this palatial structure is not for man but for the Lord God.”

“So,” David says, “I’m making all my resources available—gold, bronze, wood, onyx, turquoise, and all kinds of fine stone and marble. And I’ll make these available in large quantities. Besides, in my devotion to the temple of my God I now give my personal treasures of gold and silver, and above everything I have provided for this holy temple, I’m going to give an additional thirty thousand dollars’ worth of gold (gold of Ophir) and seventy thousand dollars of refined silver, for the overlaying of the walls of the building. Now who else is willing to join this campaign and consecrate himself today to the Lord?”

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As my own professional skills and knowledge in fundraising grew, I saw how this story described a modern-day capital campaign so very well. All the steps of a successful campaign were outlined, and the current best practices were also reflected:

- CLICK HERE to read the rest of the article.

(Reprinted with permission from Ministry Magazine)
11 Promising Fund-Raising Tactics to Help Charities Thrive in 2011

By Holly Hall, Features Editor, The Chronicle of Philanthropy

The struggling economy continues to challenge fund raisers, but a growing number of charities see encouraging signs that the worst of the downturn is behind them.

In a Chronicle poll of 245 charities conducted in January, for example, more than 60 percent said that contributions had increased in November and December, compared with the same months in 2009.

Fund raisers say their success is the result of new approaches that were crafted to meet the needs of donors facing tighter circumstances and charities with constrained solicitation budgets.

Few fund raisers expect huge increases in 2011, but some are forecasting a steady uptick.

"We are in a modest recovery," says Bill Sturtevant, senior principal gifts consultant at the University of Illinois Foundation, in Urbana-Champaign.

He expects an increase of about 5 percent in contributions this year, an impressive gain given how bad the economy has been. But, he notes, it is still below the 6 to 7 percent average increase that colleges and universities typically achieve, according to surveys by the Council for Advancement and Support of Education.

And no matter how savvy a fund-raising effort his organization makes, Mr. Sturtevant knows he still has to deal with lots of donors continuing to suffer economic pain. He says his institution last year lost a $15-million gift it had been counting on from a real-estate developer who had so many financial setbacks in the downturn that he couldn’t fulfill his charitable commitments.

"Things like that strike at a fund raiser’s heart in terms of provoking anguish,” he says. "Many of us in major gifts can tell these horror stories of gifts postponed or lost, possibly forever.”

Nonetheless, plenty of charities have found ways to overcome even the biggest challenges. Here are 11 promising tactics that charities around the country say have helped them thrive in tough times.
Conference on Philanthropy - Indianapolis
2011 - June 21-24

The 13th International Conference on Philanthropy and Leadership Symposium is just a few months away. Have you registered?

We hope you are planning to attend the 2011 Conference on Philanthropy and Leadership Symposium. You can look forward to a wonderful group of speakers and sessions that will make your experience at the conference as productive and enriching as possible. To learn more about this year's speakers, follow this link.

Pre-conference sessions:

- **Leadership Symposium, June 22:** A day-long session at the Conference on Philanthropy designed exclusively for CEOs, CFOs, and CDOs of Adventist organizations to inspire Philanthropic growth and vision for the future. More on the Symposium here

- **Racing Along the Road to Success: A Philanthropy Workshop for Newcomers, June 21:** This course is designed for anyone interested in “racing” their organization’s philanthropy program to the next level or establishing a fund raising program for the first time. The pre-conference workshop is a must-attend for those who have worked in philanthropy three or fewer years either as a professional staff or a volunteer. However, any individual interested in knowing more is welcome to participate. The course will highlight strategies that provide the foundation for a successful fundraising program. This includes fundamental information about direct mail, phone solicitation and special events. Basic information will also be shared regarding advanced strategies including face-to-face solicitation, grant proposals and electronic solicitation. Finally details about prospect identification and planning will be discussed. This workshop is the perfect kick-off to gaining the most from the remainder of the conference. Don’t miss this opportunity to stand in the winner’s circle. The Workshop is capped at 100 attendees, so register early. More on the Workshop here

- **Online Fundraising and Social Media, June 21:** The Fund Raising School’s (TFRS) course, Online Fundraising and Social Media will teach the skills and knowledge needed for leadership success in today’s high-performance nonprofit
Fundraising is based on relationships. So how can you use e-mail, online tools, and social networking sites effectively as part of your friend-raising and fundraising strategy? Review the array of tools available for connecting with your donors online—from e-mail and Web sites to Facebook and Twitter. We take a look at what each tool will and will not do—and give you practical advice for creating a solid e-strategy for build relationships and donations for your organization. More information here.

**Conference Schedule:** A [preliminary conference schedule](#) is available on our website. It’s never too early to start planning for the sessions you would like to attend.

**Scholarships:** Each year PSI offers scholarships for professional training events in philanthropy. These scholarships make it possible for newcomers and other professionals to attend conferences that will bolster their skills and provide a higher return on investment for their institutions’ vision and mission. The funds cover related expenses for national and regional conferences. [CLICK HERE](#) for more information, or for more details on the scholarships program contact us at 301.680.6131.

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**About the JW Marriott and Indianapolis**

The JW Marriott, the newest and most spectacular hotel in Indianapolis, has everything that you are looking for as a conference host. Indianapolis is equally situated to be your destination city as you plan to vacation. We've put a lot of time and thought into picking a hotel and location in which you can conference and relax. Click the link below to see why the JW Marriott and Indy are two places you need to be during this June.

[View the brochure](#)

- [CLICK HERE](#) to Visit the Hotel Site
- [CLICK HERE](#) to Register for the Conference
- [CLICK HERE](#) to Register at the Hotel

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**CFRE survey surprise?**

**Fundraising similar from Kenya to Canada...and beyond!**

The new CFRE exam that debuts in North America June 2011 is the most internationally developed yet. One of the surprises that emerged during that development: Fundraisers in countries as diverse as Kenya, Canada, and Brazil all go about doing their jobs in similar
The CFRE exam development team, which included scores of experts, investigated the tasks and know-how of successful fundraisers in eight countries and three languages.

A lengthy professionally prepared research survey was sent to nearly 3,000 CFREs and non-CFREs, working in mature philanthropic marketplaces (Australia, Canada, New Zealand, the United Kingdom, and the United States) and in countries where modern, mass-market fundraising is a newer phenomenon (Brazil, Italy, and Kenya).

The fundraising industry has been standardizing best practices steadily across continents. The international popularity of the CFRE credential is an indicator of the industry's growing professionalisation around the globe.

- CLICK HERE to read the rest of the story
- CLICK HERE for the New Test Content Outline

### Adventist Philanthropy Leadership Awards

The Philanthropy Awards, sponsored by the Seventh-day Adventist Church and Philanthropic Service for Institutions recognizes individuals who have displayed exemplary philanthropic leadership at Adventist institutions. These awards, given during the PSI Conference on Philanthropy June 22, recognize philanthropic leadership in three categories.

The Trailblazer Award, now renamed the Milton Murray Trailblazer Award in honor of PSI’s founder, recognizes professional fundraisers who have exhibited creativity, initiative, and consistent professional leadership on behalf of Adventist philanthropy in its institutions by professional practice in fundraising. (Photos: At left, Milton Murray, and at right, Elaine John, the 2008 Trailblazer Award recipient.)

The Adventist Philanthropy Leadership Awards honors individuals who have displayed exemplary benevolence to Adventist institutions through visionary leadership by partnering with organizations through their resources to establish a stronger sense of service to God and their community.

A new award, The Adventist CEO Philanthropic Leadership Award, will be given for the first time this year. This award recognizes outstanding service by a president, executive director,
or CEO with proven leadership in fundraising and philanthropy and who demonstrates a Biblical model of stewardship and philanthropy at any Adventist organization.”

For our Canadian colleagues

It is with great pleasure that we announce that as part of PSI’s effort to support Seventh-day organizations in Canada, a new section has been added to our website, www.philanthropicservice.com. By clicking on 'Canada' on the dropdown menu of the 'Resources' tab, fundraising professionals and non-profit leadership can access information about studies on best practices, articles of interest, and training opportunities.

Recursos para nuestros colegas de habla Hispana


From Our Members

A New CFRE Joins the Ranks

PSI has received the list of philanthropy professionals that have taken and passed the Certified Fund Raising Executive exam in the last quarter. Congratulations to Chris LeBrun, senior development office at Andrews University, and to Barbara Willis, director of development at Holbrook Indian School, for achieving their CFRE status. When staff from a PSI member organization takes the CFRE exam, PSI will reimburse half of the exam fee paid by the individual.

Research conducted by the Association of Fund Raising Professionals (AFP) revealed some very good news about income for those who already hold the CFRE baseline credential. CFREs, it seems, are among the best-paid professionals in the fundraising field with a considerably higher mean salary than non-CFREs. CFREs in the United States earn 36%
more than non-CFREs. In Canada, the differential is even wider. Canadian CFREs earn 42% more than their non-credentialed colleagues.

For more information on personal reimbursement of exam fees CLICK HERE to contact Chris Bearce or call (301) 680-6133.

To learn more about certification CLICK HERE to visit the CFRE International Web site.

“Facelift” for Foundation Board Development
by Lisa Sandoval, Executive Director, Parker Hospital Foundation Board, dba of Rocky Mountain Adventist Healthcare Foundation

While there are many challenges that a hospital board foundation may face when striving for success, we at the Rocky Mountain Adventist Healthcare Foundation have found that board development has been the most complicated task for us to overcome. Like many other foundations across the nation, we face the difficulty of developing strong, successful fundraising boards, as well as a regular referral stream for continued growth and development. There’s no denying that each generation offers a unique challenge for us to overcome – the Baby Boomers are disengaged, Generation “X” has yet to engage, and generation “Y” seems to lack a reverence for institutions, leaving them virtually absent in the philanthropic role. Couple these difficulties with the fact that our country is still in the midst of a financial recession, and the challenges continue to be a common theme among every philanthropic institution, requiring a great deal of attention. After all, your board is your greatest audience for every effort you make in fundraising, and your audience for every case statement. Without an audience your message fails to deliver any results!

Here at Rocky Mountain Adventist Healthcare Foundation with our dba Foundation Board in Parker, we went back to the very basics – the core of our board development – to develop our basic board structure. We took our traditional board structure and gave it a facelift, in essence making it more appealing to a younger generation, while still making it attractive to people in many different financial tiers and engaging to a family demographic that was common to our community.

• READ MORE

Philanthropist T. Denny Sanford Makes $10 Million Gift to the Walt Disney Pavilion at Florida Hospital for Children

The press release from the Florida Hospital Foundation announcing the gift is below. As
Florida Hospital’s donor relations manager Rebecca Becker explains, the soul of fundraising is in the relationships:

“One very interesting part of the Sanford gift is that we have had a very long, winding relationship with Disney. Brea Barnes worked for FH Foundation as Development Officer for our Children’s Hospital for several years. She left us to work for Al Weiss, president of Walt Disney World, who is also president of Vision 360, an organization that builds churches & schools around the world. She remains an active member of the foundation board of Florida Hospital for Children.

Because of Brea’s advocacy for FH for Children, Al Weiss introduced her to T. Denny Sanford. She introduced Mr. Sanford to Florida Hospital – Des Cummings, Jr. (FH Foundation President) and Marla Silliman (FH for Children Administrator). Through those relationships, Mr. Sanford was introduced to the mission of FH for Children and made the $10M gift. So, even though we lost a very valuable staff member, we did not lose a team member. In fact, we enlarged our circle of friends to include the first major gift from outside Florida. It’s all about relationships!!”

In a special ceremony on a Florida Hospital rooftop, a sea of luminaries were released into the night sky to celebrate a significant gift to the Walt Disney Pavilion at Florida Hospital for Children. T. Denny Sanford, one of the nation’s leading philanthropists, generously made a $10 million donation to support Florida Hospital with its mission to create a state-of-the-art pediatric hospital and provide a brighter future for children’s health care. In honor of Sanford’s gift to the hospital, Florida Hospital's medical office building for kids has been renamed the T. Denny Sanford Pediatric Center.

- CLICK HERE for more and to read the story of another recent gift to Florida Hospital.

Scholarship fund carries on family legacy at Loma Linda University School of Dentistry

If you’ve read the history of the School of Dentistry as documented in "Service is Our Calling" you are very aware that the Mitchell brothers were key players in the early history of the establishment of the Loma Linda University School of Dentistry. They
both led out in creating the National Association of Seventh-day Adventist Dentists (NASDAD) in 1943, along with Dr. M. Webster Prince.

Unfortunately, Dr. J. Russell Mitchell died in 1950 before his dream of a new school became a reality. His brother, Dr. Gerald A. Mitchell, picked up his torch and assumed leadership of NASDAD. Since 1999 scholarships have been awarded to dental students from the J. Russell Mitchell Fund.

- CLICK HERE to read the rest of the story and for more news from LLU School of Dentistry

The Pitcairn Islands Study Center receives an unusual gift-in-kind

The Pitcairn Islands Study Center, housed on the campus of Pacific Union College in Angwin, California, holds the world’s largest collection of material about the famous "Mutiny on the Bounty" and its aftermath. In addition to drawing scholars, journalists, researchers, authors, students and others from around the world to the PUC campus (because some of the books and items in the center can be found at no other place in the world), the website at pitcairnstudycenter.org draws scores to hundreds of queries each day. In connection with its fund-raising, a host of gifts-in-kind are given to the study center. Recently, the estate of a long-time friend of Pitcairn Island bequeathed to the center the gift of his two historically significant rifles. One was the famous Winchester '73 rifle, widely known as the "Gun that Won the West." The other was a Colt "Lightning" .44-caliber rifle, manufactured in 1887 by the Colt Firearms Company in Hartford, Connecticut. The two guns were owned on Pitcairn Island for many years by Floyd McCoy, a descendant of one of the mutinous sailors of the Bounty. Into the stock of the Winchester '73, McCoy hand-engraved information that the gun was bought in 1890 by William Christian, another descendant of the Bounty mutineers, along with other details of the gun’s history. "Since the Pitcairn Islands Study Center’s founding in 1977, this is the most unusual gift we have received," reports Herbert Ford, directer of the Center. "Fortunately, when the guns arrived here they were not a 'loaded' gift." He credits the receipt of the gift with the Center’s longtime practices of creating good relationships and building on goodwill with people who are interested in the history of Pitcairn Island.

From the Bookshelf:
Are you using all the tools available to connect with your network?

This resource offers a set of guiding principles to help nonprofit leaders navigate the transition from top-down organizations to a networked approach enabled by technology. It contains specific strategies for implementation and secrets to success from nonprofits who have used new social media tools effectively themselves. It also offers exercises and how-to's for implementation. A key element of this book is interviews with current nonprofit managers who have learned how to jump into the social media fray without a net and thrived because of it.

Available through Amazon or Barnes & Noble, or check with your favorite bookseller.

The One Question Your Donor Newsletter Must Answer

By Alan Sharpe, CFRE, fundraising practitioner, author, trainer and speaker

Your donors expect something from your donor newsletter that they don’t expect from their daily newspaper or cable news show.

Yes, your supporters read your newsletter and the newspaper to discover what’s new, what’s going on, what’s current. They read to be better informed, to understand the issues better.

But your donors have one question they want answered when they read your newsletter, and it’s not a question they ask of any other media. Their question is this: “What have you done with my money?”

Answer this question well and you’ll keep your supporters. Answer it poorly, or not at all, and you’ll watch your donors fall away.

Don’t be fooled into thinking your donor newsletter has to present news only. That’s what
newspapers do. That’s what your communications department would do if it had its way. But your publication’s primary purpose isn’t news: it’s stewardship. And you prove that stewardship through news.

- CLICK HERE to read the rest of the post

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Sent to ahc@andrews.edu: unsubscribe | update profile | forward to a friend

Spam
Not spam
Forget previous vote
As a fundraising professional, I have found that some Bible stories provide great insight into the principles of fundraising. One of the best examples is found in 1 Chronicles 29:1–17, where David outlines his donations to the building of the temple because “this palatial structure is not for man but for the Lord God.”

“So,” David says, “I’m making all my resources available—gold, bronze, wood, onyx, turquoise, and all kinds of fine stone and marble. And I’ll make these available in large quantities. Besides, in my devotion to the temple of my God I now give my personal treasures of gold and silver, and above everything I have provided for this holy temple, I’m going to give an additional thirty thousand dollars’ worth of gold (gold of Ophir) and seventy thousand dollars of refined silver, for the overlaying of the walls of the building. Now who else is willing to join this campaign and consecrate himself today to the Lord?”

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As my own professional skills and knowledge in fundraising grew, I saw how this story described a modern-day capital campaign so very well. All the steps of a successful campaign were outlined, and the current best practices were also reflected:

Written by Lilya Wagner, Halvard B. Thomsen
practices were also reflected:

• The “kingdom” (i.e., institution or organization) budgets for a campaign because it takes money to raise money; it also practices good stewardship.

• The king (i.e., board chair, president, or executive director) gives personally.

• Leaders (board members, organization personnel) give.

• The campaign is made public, and donors are enthusiastic.

• Donors give when asked.

• People give for worthwhile causes—they give to achieve results. It is not about the money; it is what the money accomplishes.

• The campaign is a success.

Given the ample evidence in the Bible of fundraising as a ministry, there is, nevertheless, a lack of understanding, much less an embracing, of fundraising in churches. We shy away from talking about money (except to chide members for not returning tithe and giving offerings). We avoid using the term fundraising, and separate the act of giving into compartments that often do not intersect. We pray publicly about giving and say in our prayers what we do not dare say in other ways to our congregations. In short, we treat fundraising like a bad word, a despised practice even.

That attitude is all wrong, and the purpose of this article is to help put fundraising in its proper perspective. The first task, however, should be to dispel a few myths about this important ministry.

**Myth #1: “God said ‘we must give,’ so we do not do fundraising”**

In times past, tithes and offerings just seemed to materialize (or so we like to think). Today’s church members, however, are different. They want to be treated as a donor; they do not want their generosity taken for granted. Trust has to be earned through accountability, transparency, and good stewardship.

According to Dr. William Enright, director of the Lake Institute for Faith and Philanthropy, giving to religious institutions has fallen from roughly half of all charitable dollars in 1995 to a third. Between 1987 and 2004, religious giving fell an average of 30 percent. Some denominations, he said, experienced a 50-percent drop in per-household giving.³

J. Clif Christopher writes: “Donors are saying to our churches today that you have to earn our gifts.”⁴ In a book called *Passing the Plate*, the authors enumerate the reasons why religious giving is in a decline:

• The influence of mass consumerism

• Clergy discomfort with issues of money

• A confused and uninformed laity as to Christian stewardship practices

• Mistrust of organizations

• The taboo of money-talk in American culture Impulse giving has replaced planned and systematic giving (for instance, today only 9.4 percent of all American Christians tithe).⁵ For many people, their church is not automatically their “charity of choice.” Members want to be informed, want to be asked, and want to know what their offerings and donations are accomplishing. Also, they want to be acknowledged for their giving.
Myth #2: “Fundraising is for secular organizations, not for us”

If we really believe this, then how do we handle all of those Bible texts that counsel us to be facilitators of the giving process?

“Since you excel in so many ways—in your faith, your gifted speakers, your knowledge, your enthusiasm, and your love from us—I want you to excel also in this gracious act of giving. I am not commanding you to do this. But I am testing how genuine your love is by comparing it with the eagerness of the other churches” (2 Cor. 8:7, 8, NLT).

“And now, brethren, I commend you to God, and to the word of his grace, which is able to build you up, and to give you an inheritance among all them which are sanctified. I have coveted no man’s silver, or gold, or apparel. Yea, ye yourselves know, that these hands have ministered unto my necessities, and to them that were with me. I have shewed you all things, how that so labouring ye ought to support the weak, and to remember the words of the Lord Jesus, how he said, It is more blessed to give than to receive” (Acts 20:32–35, KJV).

Research has verified what many have believed or sensed: those who give to religious causes are more likely to give to other causes as well. Even if we were to ignore the fact that “it is more blessed to give than to receive,” common sense says that the joining of faith with fundraising is a practical matter that yields the best results—results that are minimized if these two factors are fractured.

Myth #3: “But we’re different”

Many Christians believe that we are a select people, but when it comes to habits of the heart, we are not. Today’s giver usually desires and requires more accountability and more of a say in what happens with their finances. This goes for both the religious and secular giver.

We cannot ignore the reasons why people give, the motivations that cause them to be involved in supporting good causes financially. Researchers Schervish and Havens have determined the most commonly stated reasons
for generosity are the following—and these apply suitably to many Christian givers as well:

• Communities of participation: people give because they are part of an entity bigger than themselves.

• Identification with a cause: how much do we do to help people truly be a part of our church life?

• Invitation to participate: according to research, the main reason people do not give is because they are not asked.

• Models and experiences from youth: are we being good philanthropic role models for our youth?

• Assurance of positive outcomes, while also realizing there is an urgency to carry out a cause.

• Demographic characteristics— the changing populations in our churches also cause changes in giving—e.g., people living longer, more consciousness of global needs, more action by youth.6

At the same time, we must respect the reasons why some people do not give. They may not see the need; they may have other interests besides the cause at hand; they may feel disenfranchised. We need to remember that philanthropy—and therefore the practice that facilitates giving (i.e., fundraising)—is about bringing people together, inclusivity, and working toward a common goal.

The best practices

Now that we have looked at some of the myths about fundraising, we need to look at some of the core principles behind it.

First, we often hesitate to use the word fundraising mostly because of abuses, especially among the clergy. But fundraising is a noble act. It is not about the money; it’s about what happens when the money is acquired. We often emphasize the need for money, yet we forget to focus clearly enough on why we need it, on the good that will result, on the people who will be helped, and ultimately how we will also benefit if we are generous.

When Jesus said, “‘Whatever you did for one of the least of these brothers and sisters of mine, you did for me,’”7 He added illustrations that apply to us as well. If we help an organization succeed in its mission and purpose because we provide the necessary funds for its functions, we have had a part in helping the hungry, the poor, the hurting, the homeless, and countless others. If we support the enhancement of the human mind and soul through education and the arts, for example, we are serving God as well. We minister unselfishly when we give to needs and opportunities that benefit those within our sphere of influence.

The six “rights” of good fundraising

The following statement, adapted from The Fund Raising School, sums up good fundraising: Fundraising is the right person asking the right prospect for the right cause in the right way for the right amount at the right time.

These six “rights” encapsulate the complex practice of fundraising.

• Fundraising is not just up to the pastor but to a team composed of leaders and lay persons with a sincere commitment to a cause. The pastor should not be a solo performer but should organize, mobilize, and motivate fundraising.

• Understanding who our donors are is a key factor as well. We need to be wise in determining where funds may come from. We also need to make it possible for all those who have an interest in our case to be invited to participate.
participate.

• Fundraising is not manipulation or coercion. People like to be part of successful efforts, and it is a privilege to be invited to become part of a collective effort. People give because they are asked, because a case has been made that allows them to see the problem they are solving and what solution can be achieved.

• Asking potential donors in the right way; that is, employing the right communication strategy (whether through the Internet, by mail, in person, or in other ways), becomes critical. This adds to the challenge but also increases opportunities as our fundraising team exercises individual talents.

• Another consideration is timing. Is this the right time to ask? Is the donor ready? Has enough information been shared? Are people passionate about accomplishing a cause? These questions must precede an invitation to participate.

• And we should forever banish the simplistic phrase, “Whatever you can give will help.” The result could be a $10 gift when really a $1,000 gift could have been requested for the Lord’s work. By showing donors what their gifts will do, we can ask for a donation in a certain monetary range.

**Fundraising as a ministry**

In the end, we must see fundraising as part of our ministry—a ministry of caring, not just for our congregation’s needs but for the many needs around us, thereby fulfilling Christ’s mandate, “ ‘Whatever you did for one of the least of these brothers and sisters of mine, you did for me.’ ” Fundraising, as a ministry, becomes part of a continuum of giving. We practice good stewardship when we consider our overall giving, beginning with tithing, giving offerings for specific church appeals, and stretching ourselves, and our resources, to care for other causes. We help others practice the same good stewardship when we educate about wise giving, making good choices, the logical expectation of results, and the mutual benefits achieved when resources are shared.

And let us not forget that we also benefit if we give and facilitate giving by others. “If you give to the poor, your needs will be supplied! But a curse upon those who close their eyes to poverty” (Prov. 28:27, TLB). “Give, and you will receive. Your gift will return to you in full—pressed down, shaken together to make room for more,
running over, and poured into your lap. The amount you give will determine the amount you get back” (Luke 6:38, NLT).

Even secular research has borne out this biblical promise. A recent study by the National Institutes of Health said, “The results were showing that when the volunteers placed the interests of others before their own, the generosity activated a primitive part of the brain that usually lights up in response to food or sex.

Altruism, the experiment suggested, was not a superior moral faculty that suppresses basic selfish urges but rather was basic to the brain, hardwired and pleasurable.” Their 2006 finding that unselfishness can feel good lends scientific support to the admonitions of spiritual leaders such as Saint Francis of Assisi, who said, “For it is in giving that we receive.” But it is also a dramatic example of the way neuroscience has begun to elbow its way into discussions about morality and has opened up a new window on what it means to be good.8

**Conclusion**

The following tombstones, I believe, illustrate the great honor of being generous.

In Warwickshire, England, this verse can be seen on a tombstone:

Here lies a miser, who lived for himself,
And cared for nothing but gathering pelf.
Now where he is or how he fares,
Nobody knows and nobody cares.

Contrast those lines to the following epitaph in St. Paul’s Cathedral, London:

Sacred to the memory of Charles George Gordon, who at all times and everywhere gave his strength to the weak, his substance to the poor, his sympathy to the suffering, and his heart to God.

Yes, we all need to always remind ourselves that *fundraising is ministry*. We then follow the words of Jesus, follow God’s command that we be generous and promote generosity. When we do fundraising, we help people obey what the Lord has called all who profess His name to do.

**Notes:**

1 Unless otherwise indicated, Scriptures are taken from the New International Version.

2 Paraphrased by the author from the New International Version.

3 Speech given at the Presidents’ Colloquium sponsored by Philanthropic Service to Institutions, November 2008.


11 Promising Fund-Raising Tactics to Help Charities Thrive in 2011

The Nature Conservancy tripled big gifts to its $1.6-billion campaign when board members made a generous matching offer.

By Holly Hall, Features Editor, Chronicle on Philanthropy

The struggling economy continues to challenge fund raisers, but a growing number of charities see encouraging signs that the worst of the downturn is behind them.

In a Chronicle poll of 245 charities conducted in January, for example, more than 60 percent said that contributions had increased in November and December, compared with the same months in 2009.

Fund raisers say their success is the result of new approaches that were crafted to meet the needs of donors facing tighter circumstances and charities with constrained solicitation budgets.

Few fund raisers expect huge increases in 2011, but some are forecasting a steady uptick. “We are in a modest recovery,” says Bill Sturtevant, senior principal gifts consultant at the University of Illinois Foundation, in Urbana-Champaign.

He expects an increase of about 5 percent in contributions this year, an impressive gain given how bad the economy has been. But, he notes, it is still below the 6 to 7 percent average increase that colleges and universities typically achieve, according to surveys by the Council for Advancement and Support of Education.

And no matter how savvy a fund-raising effort his organization makes, Mr. Sturtevant knows he still has to deal with lots of donors continuing to suffer economic pain. He says his institution last year lost a $15-million gift it had been counting on from a real-estate developer who had so many financial setbacks in the downturn that he couldn’t fulfill his charitable commitments.

“Things like that strike at a fund raiser’s heart in terms of provoking anguish,” he says. “Many of us in major gifts can tell these horror stories of gifts postponed or lost, possibly forever.”

Nonetheless, plenty of charities have found ways to overcome even the biggest challenges. Here are 11 promising tactics that charities around the country say have helped them thrive in tough times.
Money Magnet Idea No. 1: Energize Matching Gifts

The Nature Conservancy successfully “rebooted” a matching-gift offer by its trustees to donate 50 cents on the dollar for every gift of $100,000 or more to overseas conservation projects, says Angela Sosdian, acting chief philanthropy officer.

During the last three months of 2009, as part of its campaign to raise $1.6-billion, board members sweetened their offer, promising a dollar-for-dollar match on gifts of at least $50,000 to those projects.

The results were immediate, Ms. Sosdian says. Campaign donations to the projects tripled during the months the improved match was in effect, compared with the same months in the preceding year. And 83 percent of donors who made a gift contributed more than they had previously.

Other charities say matching-gift appeals made through social networks like Facebook and Twitter are proving powerful.

During the holiday season, for example, Mercy Corps, the international relief organization, “blew our November goals out of the water,” by promoting a dollar-for-dollar match in an e-mail campaign to seek money for operating expenses, says Jeremy Barnicle, the organization’s chief development officer.

Mercy Corps also included details about another dollar-for-dollar match to raise money for the charity’s work in Haiti on Twitter and Facebook.

Tweets and Facebook messages the charity posted about the match prompted $5,154 in contributions on the day they were sent. That is more than 13 times the amount the charity raised from Facebook and Twitter messages the day before, when the organization simply requested a donation.

Money Magnet Idea No. 2: Make Endowments 'Sexy'

While many donors have focused on immediate needs, rather than supporting endowments, building projects, and other capital projects during the economic downturn, some are now ready to focus on long-term concerns, says Dyan Sublett, chief fund raiser at the YMCA of Metropolitan Los Angeles.

As hard times have dragged on, people’s mind-set has shifted, she says. “The psychology of the recession has caused my board to have more conversations about sustainability and endowment.”

One board member and his wife recently pledged $2-million to the Y’s endowment, Ms. Sublett
says. “He said it was important to make sure the organization is here for every generation.”

Other board members, particularly those who have volunteered for many years, she says, have begun looking at the Y’s long-term future over the last few months.

"Donors have seen a possible vulnerability,” she adds. “General endowment has become more sexy because of the need for endurance in hard times.”

Early in 2009, the Jewish United Fund/Jewish Federation of Metropolitan Chicago declared a moratorium on raising money for all capital projects because other needs were so great, but now the charity is raising money for one building and will consider seeking gifts for others. “We are just beginning to loosen up a bit,” said Steven B. Nasatir, the fund’s president.

Money Magnet Idea No. 3: Get Donors Behind the Scenes

When charities hold house parties, dinners, and other intimate gatherings for small groups of potential donors, they usually just ask board and staff members to invite people they know, says Armando Zumaya, chief development officer at the Center for Public Integrity, a nonprofit investigative journalism organization in Washington. “A lot of these small dinners are wasted,” he says.

So Mr. Zumaya is taking a different route: To prepare for the center’s dinners, he trained a colleague to help him do research to identify wealthy potential donors who are likely to take an avid interest in the center’s work.

The fund raisers seek out wealthy people who have shown interest in civic causes by, for example, contributing to public television and radio stations. Then they figure out other people those potential donors might like to meet and ask them to serve as co-hosts or to reach out with a personal invitation.

At the dinners, guests mingle with the center’s reporters who talk about journalism projects. “One of the best things I can do is have reporters tell the stories of their work,” says Mr. Zumaya.

For donors, he adds, “this feels very exclusive and behind the scenes.”

Among the guests at one dinner were Jeremy Grantham, an investor, and his wife, Hannelore. The couple has since pledged $2.5-million for investigative reports on environmental issues.

To receive the full amount, the Granthams said that the center must raise another $1.2-million for environmental reporting from other donors, bringing the total given to $3.7-million.

These dinners have proved to be extremely cost-effective, says Mr. Zumaya. With board members opening their homes for the events or donating much of the cost, the most the center has spent on a dinner is $7,000.
Money Magnet Idea No. 4: Ask Corporations for Money and More

Habitat For Humanity has held onto multimillion-dollar corporate donors, even while other charities have lost them to the recession. Mark Crozet, the charity’s senior vice president for development, chalks up that accomplishment to “deep relationships” with companies that go far beyond grants.

Whirlpool, the appliance company, is a good example, he says. Each year the company donates a refrigerator and stove to every home the charity builds in the United States, makes cash grants to the organization’s work overseas, and involves employees in Habitat volunteer projects.

Now in its 10th year of supporting the charity, the company is in the midst of negotiating a new commitment that would provide $40-million in cash and donated products to Habitat over the next four to five years, says Mr. Crozet. “They are trying to be part of every family we serve.”

The Nature Conservancy last month announced a new $10-million agreement with the Dow Chemical Company that also goes beyond just getting a corporate check. It also includes a pledge from the company to help advance the charity’s conservation mission. Under the deal, the conservancy will place scientists at three of Dow’s manufacturing sites to help the company determine the value of natural resources on or close to the sites. Dow has pledged to use that information to minimize the harm its business operations do to the environment. Both organizations have promised to share the Nature Conservancy’s findings widely in hopes of motivating other companies to adopt similar approaches.

Nature Conservancy officials concede that the agreement with Dow is likely to draw criticism from people who question the chemical company’s environmental record and motives. But they say the new alliance exemplifies the type of in-depth collaboration between business and charity that is needed to protect natural habitats.

Money Magnet Idea No. 5: Offer Special Perks

When people join the Delaware Museum of Natural History, in Wilmington, they get a lot more than free admission to its collections.

Because the museum belongs to the Association of Science-Technology Centers, any donor who contributes at least $45 can also make free visits to more than 250 museums and other institutions that are scattered throughout the United States and other countries.

“This is quite a savings,” says Dawn Swartout, director of development at the natural history museum. “It is our biggest selling point.”
Among the other perks: Donors can attend members-only preview parties for the three or four traveling exhibits the museum features each year.

“We are trying to bundle things, do things to give people value for their money, and being as verbal about it as we can,” says Ms. Swartout.

**Money Magnet Idea No. 6: Pitch Sponsorships to Family Funds**

Like many institutions, the Tulsa Symphony has been hard pressed to find corporate donors since 2008 when the financial crisis hit.

“It’s become increasingly difficult to tap corporate contributions, even when asking for educational music programs serving low-income students,” says Martha Mattes, the symphony’s grants coordinator.

Local companies have also been unwilling to sponsor concerts or provide general operating support, she says.

The symphony did succeed, however, when it asked local family foundations to sponsor concerts for $50,000 each in 2010. The family funds had a record of supporting the arts, and three of them liked the idea so much that they agreed to sponsor the concerts. Ms. Mattes hopes to enlist four or five family funds as sponsors in the coming year.

**Money Magnet Idea No. 7: Push Donors to Give Online**

Many charities have realized that online gifts are larger than the ones they get in the mail, but few are taking creative steps to persuade their traditional donors to move to the Internet.

The Salvation Army Kentucky and Tennessee Division, however, is testing an effort to turn its mail donors into Internet supporters. The charity decided to take that step after it figured out that its online donors give an average of $98 apiece. Many of those donors had made previous mail gifts that were much smaller, only about $38 on average.

So this month, the Salvation Army is sending a direct-mail solicitation that teases readers by telling them only part of the real-life story of “Sally,” a homeless alcoholic woman who came to the charity’s shelter on one of the coldest nights of the year.

The mailing urges recipients to go online to get the rest of Sally’s story. There they will learn how she turned her life around with help from the charity, and they can also watch a video interview with her that the charity made with an inexpensive hand-held camera.

“We are hoping this will pay off, not just donation-wise but getting the fuller story out about
the full breadth of services we provide,” says Christopher McGown, the charity’s divisional development director. “This is a real-life example of what we do every day.

**Money Magnet Idea No. 8: Enlist Beneficiaries to Give**

Creative Capital Foundation, a New York charity that helps artists become self-sufficient by providing financial aid, career counseling, and other services, raises money from the artists it assists.

More than 100 of the 406 artists who have received grants from the decade-old organization are also donors who give in response to year-end solicitations, says Sophie Henderson, the charity’s director of external affairs.

In addition, a third of the more than 20 artists who participated in the organization’s first art auction held last year donated pieces rather than accepting the charity’s offer to receive half of the winning bid on their work.

The foundation is now planning a second auction, says Ms. Henderson, and “artists are lining up to donate anew.”

**Money Magnet Idea No. 9: Upgrade Fund Raisers’ Skills**

The YMCA of Metropolitan Los Angeles is working closely with the executive directors of its 25 branches to strengthen their boards and improve fund raising. Dyan Sublett, the chief development officer of the Y, also hired a fund-raising consulting company that specializes in helping small charities, and it worked with one branch struggling to meet its annual goal to raise $220,000.

The company, which was paid about $30,000 to spend two full days each week with the branch for six months, completed an “audit” to assess its fund-raising abilities, helped recruit some new board members, and provided fund-raising training to employees.

The result: “A branch I didn’t think could meet its goals has now exceeded them two months before their fiscal year ends,” Ms. Sublett says. “I was really impressed.”

**Money Magnet Idea No. 10: Support Grass-Roots Fund Raising**

Livestrong, a cancer-fighting charity started by the champion cyclist Lance Armstrong, last year decided to set aside $50,000 to improve bicycle races, walkathons, auctions, house parties, and other fund-raising events organized by volunteers nationwide.

In addition, two of the charity’s staff members have provided advice on marketing and other
tactics to the volunteers and sometimes attend local events to provide more information and assistance. As a result, grass-roots events last year produced $3.6-million, up from $1.7-million in 2009.

This year Livestrong officials want to provide even more support for local events. They plan to offer people organizing new events for Livestrong an opportunity to call seasoned volunteers from successful events to get ideas and advice.

**Money Magnet Idea No. 11: Seek Out Young Volunteers**

The Home for Little Wanderers, a Boston social-service group that works with children and families, in October raised $25,000 at a casino night organized by a group of young professionals including the 27-year-old son of the charity’s chief executive.

Held in a high-end hotel, the event featured a disc jockey and a roulette wheel and charged donors $100 apiece to attend.

World of Children, which gives annual prizes and raises money for people around the world who aid needy kids, last year created a board of 10 “young leaders” mostly in their 20s and 30s who have organized chapters and started holding fund-raising events in six cities nationwide.

Among their gatherings: cocktail parties; a play performance at a theater that gave all the money from ticket sales to the charity; and a birthday party given by a young executive at a Chicago advertising agency who asked his guests to donate to World of Children instead of buying him a birthday present.

The new board “has had an enormous effect in building a community of young philanthropists interested in our work,” says Lynn Wallace Naylor, World of Children’s executive director. “They are working with us online, they are tweeting and Facebooking.”

As a result, she says, traffic to the charity’s Web site last year grew by 200 percent over 2009, while online gifts tripled to more than $51,000.
Dear Senior Leader:

At our upcoming International Conference on Philanthropy, PSI will offer a special symposium at which attendance is by invitation only. We therefore invite you, as a senior member of your organization’s leadership, to attend this one-day meeting that focuses on management, accountability and strategic issues relevant to your organization's ability to fulfill its mission.

The date is June 22, 2011 at the JW Marriott in Indianapolis, IN. We urge that the three key leaders from your organization attend this special offering--the CEO, CFO and Chief Philanthropy Officer. Besides a keynote designed to appeal especially to senior management, there will be a facilitated discussion along critical philanthropic issues facing nonprofits today, including yours.

What makes this event unique, however, is the day will be guided by your peers, using a facilitator and the “Open Space” concept, an innovative and quite new method of remaining focused and true to the topic but also allowing advanced professionals to have a say in what will make such a day useful for their leadership (please see attached, for more on this type of event).

Attendance at this exclusive event is extended to senior professionals who meet at least two the following criteria:

- Chief philanthropy officer with a fundraising staff of three or more.
- CEO/President/Executive Director/CFO.
- Certification (e.g., CFRE, FAHP, CTFA).
- Five years in a leadership position that includes oversight of fundraising related issues.

There is no charge to attend the symposium if you have registered for the full conference (if not, there is a $195 fee). Additionally, each attendee will receive a complimentary book.

We hope that you will attend and participate. We have carefully planned this event so that you can network with other leaders of similar stature and professional experience in a way that is inclusive, interactive and fosters innovation.

We look forward to hearing from you.

JoAline Olson (Leadership Symposium Chair)
VP for Innovations
Adventist Health

Dr. Lilya Wagner, CFRE, Director
Philanthropic Service for Institutions
The Leadership Symposium opens with a keynote from Dr. Dwight F. Burlingame, CFRE, an Associate Executive Director and Director of Academic Programs & Chair of the Philanthropic Studies Faculty at the Center on Philanthropy, and Professor of Philanthropic Studies and Public and Environmental Affairs at Indiana University, as well as a noted author and editor.

Dr. Burlingame’s talk will set the stage for the symposium and expound on the idea of cultural philanthropy and leadership’s instrumental role in ensuring it flourishes within your institution.

Michael Herman, MHA, will have the remainder of your time as the facilitator of “Open Space,” the session that works by harnessing and acknowledging the power of self-organization. Groups like United Airlines, Lucent Technologies, Loyola University, the International Agri-Trade Council, and Crossroads Center for Faith and Work are just a few who have benefited greatly from “Open Space.”

Mr. Herman is recognized internationally as a leader in the practice of “OpenSpaceTechnology” and other approaches for inviting leadership and learning into your organization.

If you will also attend the Conference on Philanthropy, we would suggest that you register before the February 22nd Conference early-bird-rate deadline of $595. Bring your leadership team (3 registrants) and receive an additional $250 discount for your group. You can register for the Conference by visiting www.philanthropicservice.com

You are responsible for your own lodging arrangements. Visit www.philanthropicservice.com and go through our hotel link to receive the special room rate of $129 per night (double occupancy) at the brand new JW Marriott Indianapolis.

Please contact us with any questions you might have! We look forward to gathering with you on June 22nd for the best Leadership Symposium to date. See you in Indy!
Racing Along the Road to Success: A Philanthropy Workshop for Newcomers

This course is designed for anyone interested in “racing” their organization’s philanthropy program to the next level or establishing a fund raising program for the first time. The pre-conference workshop is a must-attend for those who have worked in philanthropy three or fewer years either as a professional staff or a volunteer. However, any individual interested in knowing more is welcome to participate. The course will highlight strategies that provide the foundation for a successful fundraising program. This includes fundamental information about direct mail, phone solicitation and special events. Basic information will also be shared regarding advanced strategies including face-to-face solicitation, grant proposals and electronic solicitation. Finally details about prospect identification and planning will be discussed. This workshop is the perfect kick-off to gaining the most from the remainder of the conference. Don’t miss this opportunity to stand in the winner’s circle.

Comments from previous participants.
● A standing ovation for the entire day of presentations!
● Very informative and organized. Presented helpful info with clarity and humor.
● Practical application made theory have wings.

Top 3 benefits include learning about:
1. the four primary components of a total philanthropy program and how to integrate them to reach higher philanthropic goals;
2. the tools of solicitation to have a stronger program; and
3. the importance of planning and goal setting to achieve improved results.
Online Fundraising And Social Media

Learn the knowledge and skills needed for leadership success in today’s high-performance nonprofit organizations.

Fundraising is based on relationships. So how can you use e-mail, online tools, and social networking sites effectively as part of your friend-raising and fundraising strategy? Review the array of tools available for connecting with your donors online—from e-mail and Web sites to Facebook and Twitter. We take a look at what each tool will and will not do—and give you practical advice for creating a solid e-strategy for building relationships and donations for your organization.

Indianapolis, IN 8:30 a.m. - 5:00 p.m.

Class size limit: 40

Tuition: $500
### June 22, 2011 -- Wednesday

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<td><em>Spiritual Renewal</em> - Charles Sandefur</td>
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<td>10:30 - 12:00</td>
<td><em>Coming Soon!</em></td>
<td><em>The Art and Science of Major and Planned Gifts</em></td>
<td><em>The Parent Partnership</em> - Dan Krause</td>
<td><em>How to Work with Consultants</em> - George Mongon</td>
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<td><em>Coming Soon!</em></td>
<td><em>Alumni Engagement - The Butler Way</em></td>
<td><em>Boards</em> - Dan Krause</td>
<td><em>Leveraging the Power of the Purse</em> - Linda Myette, CFRE</td>
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<td><strong>Effective Online Storytelling</strong></td>
<td>The CEO/ Fundraiser Partnership</td>
<td>The Joy of Giving: Engaging Loyal Donors in Your Annual Fund</td>
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<td><strong>How to Raise Money Online in a Bad Economy</strong></td>
<td>Heart and Soul: BecomingPhilanthropic Partners with Your Major Gift Donors</td>
<td>How to Effectively Use Volume in the Annual Fund</td>
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<td><strong>Ice Cream with Vendors</strong></td>
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<td><strong>Style Wise Leadership™</strong></td>
<td>Entrepreneurs and the Changing Landscape of Philanthropy</td>
<td>Incorporating Major Gift Fundraising into the Annual Fund</td>
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<td>-Bob Fogal</td>
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<td><strong>Style Wise Leadership™ Part II</strong></td>
<td>Why Measure Money if Fundraising is About Relationships?</td>
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**June 23, 2011 -- Thursday**
### CONFERENCE ON PHILANTHROPY -- June 21-24, 2011 (*DRAFT*)

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### June 24, 2011 -- Friday
Dear Friends and Colleagues,

We have just returned from the newly opened JW Marriott Indianapolis, and it's INCREDIBLE! The JW Indy is the world’s largest JW Marriott, and is situated adjacent to the NCAA Headquarters and Hall of Champions, White River State Park and Zoo, Indianapolis Indians baseball field, Indiana State Museum, Eiteljorg Museum of American Indians... and of course The Center on Philanthropy at Indiana University. What a great hotel...what a great location!

This incredible hotel is a direct result of your input. After the last conference we asked you what you wanted from a destination. You said, "Make it more family friendly." In the following pages we’ll show you how this hotel and surrounding community does just that. You said you wanted better and healthier food options. Read ahead to see how we’ll meet those expectations. Also, you mentioned free evenings and more opportunities for networking. You’ll find we’ve included all this and more in a new, unique and truly enjoyable hotel and mid-western city experience.

Make plans now to attend the conference and stay late to take full advantage of the resort and all it has to offer. See you in the Heartland.

-The PSI Staff
THE HOTEL & SURROUNDING AREA

CHILDREN'S MUSEUM: This is the world’s largest children's museum, with exhibits ranging from indoor carousels to dinosaur exhibits, and rock climbing walls to experiment stations. The colorful and creative exhibits attract locals and visitors from around the country.

NCAA HALL OF CHAMPIONS: HOC interactive exhibits engage visitors and provide a firsthand perspective of what it means to be a student athlete. The best of all college sports has been captured under one roof in this 30,000 Sq ft. structure that both kids and adults will LOVE.

WHITE RIVER STATE PARK/ZOO: Find green spaces galore to walk and relax in. Located in the heart of downtown, White River is the place you can enjoy the outdoors without ever leaving the city. The park boasts a world-class zoological garden. Visit the Indianapolis Zoo, the only such institution that also offers an aquarium and a botanical garden.

THE INDIANAPOLIS CANAL WALK: Visitors can utilize the canal’s paved walkways for jogging, walking, skating, biking, Segway tours, or just relaxing and enjoying the scenic waterway, murals, fountains, or a waterside café.

THE CENTER ON PHILANTHROPY & THE PAYTON LIBRARY: The Center on Philanthropy at Indiana University is a leading academic center dedicated to increasing the understanding of philanthropy and improving its practice through research, teaching, public service and public affairs. The library is the best collection in the world for resources on nonprofits, philanthropy and fundraising.

EXPLORE INDIANAPOLIS: Visit the nearby Indianapolis Motor Speedway where you can also golf four holes inside the track, or make time to see Garfield Park Conservatory and Sunken Garden, Lucas Oil Stadium or the IMAX Theater Indiana State Museum. OTHER GREAT THINGS: Of course you can always go swimming in the pool, or enjoy a state of the art health-club facility.

JW MARRIOTT INDIANAPOLIS

***Register for the Conference at the Following link:
http://www.plusline.org/eventdetail.php?id=1066788

*** Get the Special Hotel Registration Rate Here:

Get the Special Hotel Registration Rate Here:
Read, Then Reserve...

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### Visit the Links

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  [http://www.childrensmuseum.org](http://www.childrensmuseum.org)

- **NCAA HALL OF CHAMPIONS**
  [http://www.ncaahallofchampions.org](http://www.ncaahallofchampions.org)

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- **INDIANAPOLIS ZOO**
  [http://www.indyzoom.com](http://www.indyzoom.com)

- **INDIANAPOLIS CANAL WALK**
  [http://www.discovercanal.com](http://www.discovercanal.com)

- **THE CENTER ON PHILANTHROPY**
  [http://www.philanthropy.iupui.edu/](http://www.philanthropy.iupui.edu/)

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  [http://www.lucasoilstadium.com](http://www.lucasoilstadium.com)

- **SOLDIERS’ AND SAILORS’ MONUMENT**

### SEE YOU IN INDIANAPOLIS

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New CFRE exam to launch 3 June, 2011; based on widest-ever study of international best practices

In June 2011, CFRE (Certified Fund Raising Executive) candidates in North America will begin taking a revised and updated exam with roll out to remaining countries soon thereafter.

The new CFRE exam, two years in the making, takes into account best fundraising practices from the most international sampling to date (fundraisers in eight countries and three languages participated) as well as new developments like the emergence of social media.

To prepare the new exam, CFRE International first asked nearly 3,000 fundraising professionals worldwide to answer a "job analysis" survey. That survey was itself a major project. Scores of subject-matter experts and testers were involved in its development.

The job analysis survey probed in depth:

(1) what good fundraisers actually do with their time and talent, i.e., the tasks they perform that lead to success; and
(2) what kinds of expertise and knowledge does the successful fundraiser rely on.

The survey also solicited opinions about both the fundraising profession and the nonprofit industry. Respondents were asked for their predictions, for instance, of how they expect fundraising practices to change over the next five years.

The job analysis survey was sent to CFREs and non-CFREs working both in mature philanthropic marketplaces (Australia, Canada, New Zealand, the United Kingdom, and the United States) and in places where modern, full-spectrum fundraising is a newer phenomenon (Brazil, Italy, and Kenya).

Professional Examination Service (PES), a New York City consulting firm, created and administered the survey. PES conducts comprehensive job analyses for many large and rapidly changing professions, from sports medicine to IT. Founded as a nonprofit in 1941 to promote professional credentialing, PES is today among the world's foremost authorities on licensure, certification, and professional continuing education.

The new CFRE exam, based on the job analysis survey's results, will be used to test North American candidates beginning on 3 June, 2011.

CFREs rank among the best-paid professionals in the fundraising field. Certificants earn considerably more than non-CFREs on average; 36% more in the United States, 42% more in Canada. As of June 2010, there were nearly 5,300 fundraising professionals internationally holding the CFRE baseline credential.

The CFRE credential is endorsed by 21 leading philanthropic associations worldwide, including the Association of Healthcare Philanthropy; United Way of America; the North American YMCA; the International Catholic Stewardship Council; the Kenya Association of Fundraising Professionals; the Philanthropy Centro Studi, a research center of the University of Bologna; the Association of Lutheran Development Executives; the Canadian Association of Gift Planners; the Fundraising Institutes of Australia and New Zealand; and the world's largest fundraisers association, the Association of Fundraising Professionals.
Current and Prospective Donor Research

16% - 32 Items

A. Develop a list of prospective donors by identifying individuals and groups (foundations, corporations, government agencies, etc.) who have the capacity and propensity to give, in order to qualify prospective donors for further research and cultivation efforts.

B. Implement and utilize a secure data management system that stores information about current and prospective donors to enable segmented retrieval and analysis.

C. Analyse the list of current and prospective donors using characteristics such as demographics, interests, values, giving history, relationships, and linkages to the organisation, in order to select potential donors for particular projects and fundraising programmes.

D. Rate current and prospective donors in categories of giving potential in order to prioritise and plan cultivation and solicitation.

E. Present the list of current and prospective donors and relevant information to organisational leaders in order to establish consensus for action.

Key Knowledge Areas for the Above Tasks:

- Indicators that identify trends and define characteristics (such as socioeconomic, giving history, generational, gender and cultural) of a constituency
- Donor acquisition strategies
- Sources of financial support (such as individuals, corporations, grant-making bodies, foundations, government)
- Types of information needed to identify prospective donors and determine specific fundraising strategies
- Donor profile components
- Indicators of gift potential
- Donor giving patterns

Securing the Gift

19% - 38 Items

A. Develop a compelling case for support by involving stakeholders (such as volunteers, staff, and members of the Board) in order to communicate the rationale for supporting the organisation’s fundraising programme.

B. Apply prospect research data to develop a solicitation plan for involvement of individual donors and/or donor groups.

C. Plan a comprehensive solicitation programme in order to generate financial support for the organisation's purpose.

D. Prepare donor-focused and segmented solicitation communications in order to influence and facilitate informed gift decisions.
E. Ask for and secure gifts from prospects in order to generate financial support for the organisation’s purpose.
F. Evaluate the solicitation programme using appropriate criteria and methodology in order to produce accurate analytic reports for effective decision making.

**Key Knowledge Areas for the Above Tasks:**
- Psychology of giving
- Sociological and cultural influences on giving
- Elements and uses of a case statement and a case for support
- Types of gifts (cash, securities, property, gifts in kind, etc.)
- Solicitation strategies and their effectiveness with different donor groups
- Fundraising techniques and programmes such as:
  - Direct marketing (mail, telephone, electronic, direct response television (DRTV), etc.)
  - Special events (dinners, walk-a-thons, tournaments, auctions, etc.)
  - Grant proposal writing (foundations, corporations, government, etc.)
  - Corporate sponsorships, partnerships, and cause-related marketing
  - Gift planning (such as bequests, legacies, trusts)
  - Major gifts
  - Memorial and tribute gifts
  - Capital and endowment campaigns
  - Membership and alumni programmes
  - Gaming and lottery programmes
  - Workforce and payroll giving/federated campaigns
  - Street collections/face-to-face solicitation
  - For-profit activities (such as product sales and charity/thrift shops)
  - Community and third-party fundraising
  - Other
- Feasibility study components and uses
- Negotiation techniques
- External factors that may affect the viability of the organisation and its programmes/services
- Tangible and intangible ways in which donors benefit from giving
- Peer-to-peer principles and their application to fundraising
- Fundraising programme evaluation standards, procedures, and methods (including benchmark calculations such as cost of fundraising, ROI, fundraising ratios, average gift, response rates)
- Payment structures for contributions (outright, pledge, instalment, etc.)
- Communication methods and messages to reach target audiences
- The use of prospect research to inform cultivation and solicitation strategies
- Involvement of donor advisors
- Use of electronic media in solicitation (email, text messaging, widgets, etc.)

**Relationship Building**

27% - 54 Items

A. Initiate and strengthen relationships with all constituents through a systematic cultivation plan designed to build trust in, and long term commitment to, the organisation.
B. Develop and implement a comprehensive communications plan in order to inform constituents and identified markets about the mission, vision, and values of the organisation, its funding priorities, and gift opportunities.
C. Promote a culture of philanthropy by broadening constituents’ understanding of the value of giving.
D. Acknowledge and recognise gifts in ways that are meaningful to donors and appropriate to the mission and values of the organisation.

**Key Knowledge Areas for the Above Tasks:**
- Elements of a cultivation plan
- Components of a comprehensive communications plan and processes for creating one
- Donor acquisition and retention principles
- Communication methods and messages to reach target audiences
- Oral and written communication techniques
Components and uses of active listening
Aspects of nonverbal communication (body language, eye contact, etc.)
Interpersonal communication (e.g. trust building, team building, group dynamics)
External spheres of influence (such as corporate, governmental, social, civic, professional, and religious leadership) and their interrelationships
Methods for optimizing relationships between and among constituencies
Relationship between philanthropy and fundraising
Benefits of fundraising programmes for organisations
Relationship strengthening using incentives (such as member benefits, special invitations, premiums, naming rights)
Donor recognition techniques
Use of electronic media in relationship building (social networking, video sharing, etc.)

Volunteer Involvement
8% - 18 Items
A. Create a structured process for the identification, recruitment, evaluation, recognition, and replacement of volunteers, in order to strengthen the organisation's effectiveness.
B. Empower and support volunteers by providing orientation, training, and specific job descriptions in order to enhance the volunteers' effectiveness.
C. Engage volunteers in the fundraising process and related activities in order to expand organisational capacity.
D. Participate in recruiting experienced and diverse leadership on boards and/or committees in order to ensure that these groups are representative of, and responsive to, the communities served.

Key Knowledge Areas for the Above Tasks:
- Personality types and attributes
- Volunteer roles in fundraising
- Volunteer job description components and uses
- Principles of adult learning

Key Knowledge Areas for the Above Tasks:
- Skills training and competency development methods
- Strategies for optimising volunteers’ time and talent
- Volunteer recruitment, management, motivation, retention, recognition, and evaluation techniques
- Governance principles and models for not-for-profit organisations
- Value of diversity and community representation
- Respective roles of volunteer board members and staff with respect to governance and management

Leadership and Management
18% - 36 Items
A. Foster and support a culture of philanthropy across the organisation and its constituencies.
B. Ensure sound administrative and management policies and procedures to support fundraising functions.
C. Participate in the organisation’s strategic planning process in order to ensure the integration of fundraising and philanthropy.
D. Design and implement short- and long-term fundraising plans and budgets in order to support the organisation’s strategic goals.
E. Apply key principles of marketing and public relations to fundraising planning and programmes.
F. Conduct ongoing performance analysis of the fundraising programme using accepted and appropriate standards in order to identify opportunities, resolve problems, and inform future planning.
G. Recruit, train, and support staff by applying human resource principles in order to foster professionalism and a productive team-oriented work environment.
H. Contract for services in order to optimise the efforts of the fundraising function.

Key Knowledge Areas for the Above Tasks:
- Components and uses of mission and vision statements
- Strategic and action planning methods
- Fundraising programme evaluation standards, procedures, and methods (including benchmark calculations such as

CFRE International • www.cfre.org • +1 703.820.5555
- Policy development procedures
- Elements of a fundraising plan
- Place of fundraising in the strategic planning process
- Impact of organisational structures and team dynamics on the effectiveness of fundraising programmes
- Methods for ensuring the integrity of data management and record-keeping systems
- Components and uses of development audits
- Financial management, including budgeting and financial statements
- Use and application of market research
- Marketing and public relations principles
- Benefits of a media programme
- Methods for assessing the organisation’s impact on the community
- Training resources appropriate to the different fundraising programme elements
- Staff recruitment, managing, retaining, rewarding, and evaluating techniques
- Culture and definition of philanthropy
- Tools to assess the need for contracted services (e.g. gap analysis)
- Techniques for selecting, evaluating, and managing contracted services
- Principles of managing meetings
- Methods and strategies for managing change
- Principles of effective leadership
- Sources of historical and contemporary information about philanthropy and fundraising

**Ethics and Accountability**

**11% - 22 Items**

A. Ensure that all fundraising activities are conducted in accordance with ethical principles and standards.

B. Create gift acceptance policies that reflect the values of the organisation and satisfy legal and ethical standards.

C. Clarify, implement, monitor, and honour donors’ intent and instructions, and ensure that allocations are accurately documented in the organisation’s records.

D. Report to constituents the sources, uses, impact, and management of donated funds in order to preserve and enhance confidence and public trust in the organisation.

E. Comply with all reporting requirements and regulations in order to fulfil commitment to accountability and demonstrate transparency.

**Key Knowledge Areas for the Above Tasks:**

- Laws and regulations affecting not-for-profit organisations, including interactions with their stakeholders (donors, staff, volunteers, etc.)
- Legal and ethical practices related to donor record maintenance, gift accounting, and audit trails
- Methods of recording, receipting, recognizing, and acknowledging gifts
- Elements of gift acceptance policies
- Elements of gift agreements
- Accounting principles for not-for-profit organisations
- Organisational transparency, including methods for reporting fundraising performance, outcomes, and impact to constituencies
- Donor Bill of Rights/Donors’ charter
- Personal privacy and information protection
- Ethical principles relevant to cultivation, securing and accepting gifts
- Methods and processes for ethical decision making
“FACELIFT” FOR FOUNDATION BOARD DEVELOPMENT

While there are many challenges that a hospital board foundation may face when striving for success, we at the Rocky Mountain Adventist Healthcare Foundation have found that board development has been the most complicated task for us to overcome. Like many other foundations across the nation, we face the difficulty of developing strong, successful fundraising boards, as well as a regular referral stream for continued growth and development. There’s no denying that each generation offers a unique challenge for us to overcome – the Baby Boomers are disengaged, Generation “X” has yet to engage, and generation “Y” seems to lack a reverence for institutions, leaving them virtually absent in the philanthropic role. Couple these difficulties with the fact that our country is still in the midst of a financial recession, and the challenges continue to be a common theme among every philanthropic institution, requiring a great deal of attention. After all, your board is your greatest audience for every effort you make in fundraising, and your audience for every case statement. Without an audience your message fails to deliver any results!

Here at Rocky Mountain Adventist Healthcare Foundation with our dba Foundation Board in Parker, we went back to the very basics – the core of our board development – to develop our basic board structure. We took our traditional board structure and gave it a facelift, in essence making it more appealing to a younger generation, while still making it attractive to people in many different financial tiers and engaging to a family demographic that was common to our community. We started by identifying each of the challenges before us, both at a national level and within the community we served. With this outline we were able to create solutions that would accommodate today’s family, making philanthropic support through board service more appealing. Very simply stated, we molded our board structure to not only meet the needs of the Foundation but also to fit the social and financial demographics of our community.

The new Parker Hospital Foundation board structure embraces family participation and offers multiple service levels, each with varying degrees of financial and time commitments. This solution was a better fit for the family demographics within our community, and the family participation engages multiple generations – bringing them all together as a family to participate in a philanthropic role. This new structure has proven itself to be an incredible success. With a recent review of our first 6 months, the results were amazing! We have added 14 new board families, each giving at a major gift level, $10,000 over the four year term, and the second and third tier of the board are naturally filling in as we work to fill seats at the top level. We still
have quite a bit of development to work through as we get through our first full year with the new structure but we look forward to the long term success that our new model has to provide in years to come.

Written by Lisa Sandoval, Executive Director
Parker Hospital Foundation Board, dba of Rocky Mountain Adventist Healthcare Foundation
Philanthropist T. Denny Sanford Makes $10 Million Gift to the Walt Disney Pavilion at Florida Hospital for Children

In a special ceremony on a Florida Hospital rooftop, a sea of luminaries were released into the night sky to celebrate a significant gift to the Walt Disney Pavilion at Florida Hospital for Children. T. Denny Sanford, one of the nation's leading philanthropists, generously made a $10 million donation to support Florida Hospital with its mission to create a state-of-the-art pediatric hospital and provide a brighter future for children's health care. In honor of Sanford's gift to the hospital, Florida Hospital's medical office building for kids has been renamed the T. Denny Sanford Pediatric Center.

(Photo: http://photos.prnewswire.com/prnh/20101120/DC04738 )

"We are so excited to have Mr. Sanford join our Florida Hospital family and help us on our mission to not only create a beautiful place for our children to heal but also a world-class facility to inspire wellness," said Marla Silliman, administrator of Florida Hospital for Children. "This is such a special gift that demonstrates Mr. Sanford's continued commitment to providing the best health care possible for children."

The T. Denny Sanford Pediatric Center is located adjacent to the hospital at 615 E. Princeton St. and houses a wide variety of world-renowned pediatric specialists who provide care to patients at the Walt Disney Pavilion at Florida Hospital for Children.

"Children have no voice or way of telling their needs," said T. Denny Sanford. "We must hear and feel what they need and provide it for them to provide for a better world for the future. I live by a personal mission to 'aspire to inspire before you expire' and I think we can all live by that philosophy in some way."

Sanford's gift to the Walt Disney Pavilion at Florida Hospital for Children is his second significant gift made to a medical facility in Central Florida. Throughout the years, Sanford has made numerous donations to better the health of children across the country including: $400 million to Sanford Health in South Dakota; $20 million to the Burnham Institute for Medical Research in LaJolla, Calif., for the creation of the Sanford Children's Health Research Center; $15 million to the Mayo Clinic for a new pediatric outpatient facility and to create a collaboration between Sanford Children's and the Mayo Clinic; $15 million to the Children's Home Society, a South Dakota home for abused children. Most recently, Sanford donated $50 million to Burnham Institute for Medical Research in LaJolla, Calif. and Orlando which prompted a name change to the Sanford-Burnham Medical Research Institute.
"It takes many people to make the exciting things that we do at Florida Hospital possible," said Lars Houmann, president and CEO of Florida Hospital. "This includes physicians, nurses, staff, community members, board members and more. All of them have played a role in building this one-of-a-kind children's hospital. Today, I am so excited to celebrate another addition to the Florida Hospital family."

As Florida Hospital continues on its journey to become a medical destination for superior health care and biosciences, philanthropists like Sanford help make this journey possible.

"In order to remain on the cutting-edge of health care, Florida Hospital needs the philanthropic support of individuals such as Mr. Sanford," said Des Cummings, president of the Florida Hospital Foundation. "His selflessness will enable Florida Hospital to continue to provide pre-eminent faith based health care for generations to come."

About the Walt Disney Pavilion at Florida Hospital for Children

The Walt Disney Pavilion at Florida Hospital for Children is a full-service facility served by more than 80 pediatric specialists, one of the largest panels of pediatric experts in Central Florida and a highly trained pediatric team of more than 600 employees. This unique children's hospital provides patients with private, family-centered pediatric rooms, a dedicated pediatric emergency department and an Advanced Center for Pediatric Surgery. The Walt Disney Pavilion at Florida Hospital for Children delivers a complete range of pediatric health services for younger patients including advanced surgery, oncology, neurosurgery, cardiology and transplant services; full-service pediatrics; and an innovative health and obesity platform. The recent expansion includes a seven-floor dedicated entrance, three-story lobby, and when completed in April 2011, the Walt Disney Pavilion at Florida Hospital for Children will have a total of more than 200 pediatric beds.

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**In other news from Florida Hospital:**

**$1 Million to Pediatric Bone Marrow Transplant Unit**

On Friday, February 11, 2011, Margaret Guedes, CEO for Kids Beating Cancer, pledged to Marla Silliman, CEO, Florida Hospital for Children, $1,000,000 to support and name the Kids Beating Cancer Pediatric Bone Marrow Transplant Unit. Dr. and Mrs. Guedes lost their 9-year-old son, John Voight, to leukemia after two bone marrow transplants and years of home nursing. In 1992, Margaret created [Kids Beating Cancer](http://www.kidsbeatingcancer.org), (KBC) in his memory. KBC’s mission is to increase access to treatment for children with cancer and life-threatening disease in need of bone marrow or umbilical cord blood transplant by funding the cost to identify compatible donors, fund uninsured expenses and provide support for the families as they face this challenging journey towards a cure.
We thank Dr. and Mrs. Guedes for their devotion and commitment to our children and their families.

You can read more HERE.
Philanthropic Service for Institutions

Scholarship fund carries on family legacy at Loma Linda University School of Dentistry

At a [dental school] graduation party, Dr. and Mrs. Gerald Mitchell gave each graduate a small jewel box. Of course, everyone wondered what would be inside. When they opened their gifts they each found a brand new, shiny copper penny sporting a sign that read, “One Sent.” It was the Mitchell’s unique way of emphasizing the purpose of their education.”– Service is Our Calling, p. 6

If you’ve read the history of the School of Dentistry as documented in “Service is Our Calling” you are very aware that the Mitchell brothers were key players in the early history of the establishment of the Loma Linda University School of Dentistry. They both led out in creating the National Association of Seventh-day Adventist Dentists (NASDAD) in 1943, along with Dr. M. Webster Prince.

Unfortunately, Dr. J. Russell Mitchell died in 1950 before his dream of a new school became a reality. His brother, Dr. Gerald A. Mitchell, picked up his torch and assumed leadership of NASDAD. Since 1999 scholarships have been awarded to dental students from the J. Russell Mitchell Fund.

Years ago in Guam, Shirley Lee, BS ’82 worked with the son of Dr. Mitchell, Sr. who was also a dentist. When Dr. Gerald A. Mitchell, Jr. corresponded by email recently with Shirley, she contacted the Office of Development for ideas on how he could establish a fund to benefit Dental Hygiene. Because
of Shirley’s relationship with Dr. Mitchell, Jr. a generous gift, at the passing of his stepmother, has provided funds in which a scholarship fund has been established for dental hygiene students. The fund will also carry forward the tradition of the annual Dental Hygiene Mitchell Award.

Stated Dr. Mitchell, Jr. in a recent letter, “I, too, am pleased that this bequest from my father and stepmother can be used to further the oral-hygiene education of worthy students. I was proud of the role my dad, Dr. Gerald A. Mitchell, and my uncle, Dr. J. Russell Mitchell, played in the establishment of the School of Dentistry in the early 1950s.

I felt that I was almost a part of that effort as I was so close to my dad’s activities in those days . . . I’m grateful that my dad’s memory can be perpetuated in this way.”

Special thanks to Shirley Lee for all she did to put Dr. Mitchell, Jr. in contact with the Office of Development and for her help in working with him.

**In other news from Loma Linda University’s School of Dentistry:**

**A Chance Encounter Leads to a Chance Encounter in Giving**

On February 17, 2010, Kyle Aiuto, with his mother, Sharon, walked in to Cornali Orthodontics in Albuquerque, New Mexico for a new patient appointment.

Kyle suffered from hypoplastic left heart syndrome at birth and at nine days of age received a new heart Loma Linda University Children’s Hospital. Kyle became the poster child for organ donation in New Mexico.

At age four, Kyle participated in an investigation of craniofacial growth in infant heart transplant recipients receiving the immunosuppressive agent cyclosporine. The study was conducted as part of the thesis research requirement by the Advanced Education Program in Orthodontics at Loma Linda University School of Dentistry. Second-year resident, Dr. John Cornali, and his professor, Dr. David Rynearson, performed the research.

The study concluded that transplant children treated with long-term
cyclosporine showed a relatively normal pattern of craniofacial growth and development. Radiographic analysis showed an unusually high incidence of congenitally missing teeth (third molars, premolars, and lateral incisors), impacted teeth, and ankylosed primary molars. Also of clinical significance was a high incidence of gingival hyperplasia.

Cornali received “The Roland D. Walters Annual Orthodontic Research Award” in recognition of research and the development of research protocols useful in future projects at Loma Linda University. Rynearson received recognition for the study when the results were published in The Journal of Heart and Lung Transplantation.

“I recognized Kyle’s mother the minute I saw her in the waiting room,” stated Cornali to a KOET news reporter who broke the story. “There are 20 orthodontists in our community,” he continued. “How they ended up in my office, I don’t know.”

The family was touched that Cornali actually remembered Kyle, who is now 14, from the study.

Kyle presented with a Class II, open bite mal-occlusion. Consistent with the research study results, Kyle had severe gingival hyperplasia causing many of his teeth to be soft tissue impacted. He also had impacted third molars and a horizontally impacted mandibular left second molar.

Cornali was so touched that Kyle participated in his thesis project helping him to earn his Masters degree that he decided he must return the favor by treating him pro bono.

“It was like a needle in a haystack,” Sharon told the reporter, A chance encounter! “We happened to walk into the right office at the right time,” she continued. “I was in tears. I couldn’t even say anything. I couldn’t even say thank you at that point.”

Cornali also enlisted the pro bono the services of Dr. Jerry Jones, Albuquerque oral and maxillofacial surgeon, who removed Kyle’s impacted third molars and impacted mandibular left second molar.
Then Dr. Michael Sparks, an Albuquerque periodontist, performed gingival recontouring and crown exposure to remove hyperplastic gingiva and allow for the placement of orthodontic appliances.

Finally, after several months of preparation, Dr. Cornali placed Kyle’s braces. Kyle is now progressing nicely with his orthodontic therapy and is in intermediate, heat activated wires. He is a great cooperator with his elastic wear and his open bite is closing and his smile is beginning to take shape. It is anticipated that Kyle’s treatment will take another 16-18 months to complete.

Since Kyle and his family give a lot of their time to promote organ donation in the community, this Chance Encounter became one of a helping kind! “The gift of all three doctors,” Kyle’s mom says, “makes the circle of giving complete.”

What would you say when offered a gift of one million teeth? Click to read:

One Million Teeth: A Gift-in-Kind for Loma Linda University’s School of Dentistry
Your donors expect something from your donor newsletter that they don’t expect from their daily newspaper or cable news show.

Yes, your supporters read your newsletter and the newspaper to discover what’s new, what’s going on, what’s current. They read to be better informed, to understand the issues better.

But your donors have one question they want answered when they read your newsletter, and it’s not a question they ask of any other media. Their question is this: “What have you done with my money?”

Answer this question well and you’ll keep your supporters. Answer it poorly, or not at all, and you’ll watch your donors fall away.

Don’t be fooled into thinking your donor newsletter has to present news only. That’s what newspapers do. That’s what your communications department would do if it had its way. But your publication’s primary purpose isn’t news: it’s stewardship. And you prove that stewardship through news.

Unlike newspapers and magazines, you have a moral obligation to your reader to show what you’ve done with her money. Your donors support your organization because they want to change the world. They’ve decided to do that through you rather than another charity.

Which means your supporters demand that you show them how their donations have made a difference. They don’t want to read about your latest committee. They’re not interested in Bob’s promotion. Or that a group went to the local bowling alley and a good time was had by all.

“How did you use my donation?” That’s what your supporters want to know. So show them. Tell them. Use vivid photos, stirring testimonials, gripping narratives and donor-centred stories to prove (as though you’re the CEO reporting to your shareholders) that you have used your donor’s gift to improve the world. Show proof.

What you need before you write any newsletter story is not a good hook or a great photo or a message from your executive director delivered before you go to press. What you need is evidence. Concrete evidence. Evidence that would persuade a jury of your peers in a court of law that you invested your donor’s donation prudently and that it generated a return on investment in lives changed.

I recommend you draw a picture of a jail cell and tape it to your monitor. Stare at it before you write any story. Imagine a group of your donors ready to press charges unless you answer the one question they demand from you. Then start writing.