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NEW YORK STATE ETHICS LEGISLATION

The New York State Legislation has twice passed legislation mandating ethics education for certain classes of fundraisers. The first bill was vetoed by former Governor Spitzer, and the second was vetoed by former Governor Patterson after objections were raised by IAFF and others. The bill was re-introduced in 2011 in recent weeks. While the Greater New York Chapter of AFP strongly supports ethics education for fundraisers, we continue to have specific concerns about the proposed legislation and continue to work with IAFF and our sister AFP Chapters to ensure that this Bill does not get passed. If you would like to help us in our efforts with this and other matters, please contact our Chapter about joining the Committee of Governance & Public Policy.

MEMBERSHIP TIP

Did you know that if you attend all our great events in 2011, the member discounts you receive will actually pay for the entire cost of your AFP membership?

Sign up for an event today and get the most out of your AFP membership!

If you are not an AFP member, become one today!

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A CONVERSATION WITH . . .

On March 17-18, 2011, the New York Chapter of AFP is hosting the interactive program, The "Collaborative Edge" for Raising Major and Planned Gifts, at Planned Parenthood, 434 West 33rd Street. The Monitor sat down with the featured speakers, Laura Fredricks, of Laura Fredricks, JD, LLC; Mark Hefter, Director of Planned Giving for the American Technion Society and Diane Blumenson, Principal, Human Productivity Solutions to discuss trends in major gifts and planned giving in today's fundraising environment.

Q: It was just reported that the largest gifts decreased greatly in 2010. Why focus on a major gifts program now?

Laura Fredricks: Those 65 gifts still totaled \$3.6 Billion. And there are lots of significant gifts beneath the radar. Everyone knows the last couple of years have been tough on fundraising, with the economy and all. But what most fundraisers don't realize is that the wealthiest Americans-the people most likely to make big gifts-have been hurt the least by the recession. Lots of these people are better off financially than they were three years ago. And they're STILL making big gifts. You're missing a tremendous opportunity if you're not effectively engaging these major gift prospects and talking to them about making transformational gifts to your organization.

Mark Hefter: Laura's absolutely right. We all hear there's a "new reality" out there in the fundraising world, but what does that really mean? And have we fundraisers really absorbed the changes in our field? For example, last month Congress passed the most sweeping changes to our tax law in 25 years. It totally changed the tax incentives for charitable giving. How many fundraisers are aware of the changes, much less how to capitalize on them? Those who come to our program on March 17-18 are going to learn how.

Diane Blumenson: The "new reality" simply means that we need to be more skillful and strategic in our work with major gift donors. 98% of high net worth households continue to give, and they are the largest single source of philanthropic funding. If the average gift size shrinks, we need to be adept at increasing the number and quality of relationships we manage.

Q: Why include a Planned Giving piece in a Major Gifts Program?

MH: Planned Giving is the most misunderstood area of fundraising. You can't conduct an effective major gifts campaign without having a planned giving program. Planned giving is just a type of major gifts fundraising. All the basic concepts related to major gifts apply to planned giving. The two subjects are necessarily related and complimentary to each other.

Q: You've invited CEOs and Board members to your program. Why?

LF: Again, it's all a part of this new reality. Fundraising is everyone's job now; everyone has to be on board and play her part. The CEO or volunteer leader who doesn't immerse herself in the fundraising process is going to see her organization fall farther behind the curve.

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WHY I JOINED AFP

Many of us take our AFPNYC membership for granted. To remind us of how joining and staying involved with AFPNYC enhances our careers and our lives, we'll be using this space to let members tell their stories of how they got involved with our chapter, and how they use their membership in AFPNYC to become better fund raisers and better citizens. You may be surprised to learn how AFPNYC improves the lives of its members. First up is Toby Boshak...

"I joined AFP at the very beginning of my career. In fact the first experience I had was as a scholarship recipient to FRDNY. At that time, I attended sessions that were instrumental in helping me get a grip on this "new career" I had chosen. After that I became a member because I immediately saw that the opportunities for networking, professional advancement, and industry camaraderie offered by AFP were invaluable.

I continue to be involved in AFP for the same reasons, but additionally, it is the one organization that services a development professional on such a large scale. Other associations have focused offerings, but I like being a member of AFP, because I can attend seminars and activities that deal with a broad range of topics. I also firmly believe in the code of ethics by which AFP operates, especially having found myself in the position to educate my own board about ethical fund raising."

Toby E. Boshak

Member,
AFP Greater New York Chapter Board
Executive Director,
Princess Grace Foundation-USA

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DB: CEOs and volunteer leaders are the most influential and powerful solicitors in the fundraising effort. Skill and comfort with the major donor relationship process and "the ask" are essential for securing and sustaining vital support for their institutions.

Q: What about fundraisers from small shops or on tight budgets? Should they come?

MH: Major gifts fundraising is not the province of large charities alone. All the available evidence suggests that charities that ask for major gifts-regardless of size, focus, budget, etc.-are the ones that get them.

LF: We're talking about increasing your organization's bottom line here. If that's not worth an investment of your organization's time, money and energy, then what is?

DB: Major gift fundraising averages a cost of only \$.05 to \$.10 for each dollar you'll raise. Since this is the lowest overhead program for any development operation, it is the small shop's wisest choice for investment.

Q: Tell me three things attendees are going to be able to take away from your program and use right away in their work.

LF: They're going to learn:

1. How everyone in the organization can work together to raise significant money;
2. Who to ask, when to ask them and how to get them to "yes."
3. How to find out what moves people and how to use that information to inspire them to make large gifts

DB: Attendees will be introduced to relationship science and will discover how to achieve:

1. Instant rapport
2. Relationship success
3. Trust and Influence

MH: When we're done, the attendees should be able to find all the major gift prospects they need right under their noses, assemble a team to effectively cultivate and solicit these people and tailor their organization to be a major gift and gift planning champion.

We hope to see you at The "Collaborative Edge" for Raising Major and Planned Gifts, March 17-18 at Planned Parenthood, 434 West 33rd Street. For more information on the program and our featured speakers, and to reserve your place at this lively, informative and interactive event, visit

<http://bitly.com/collaborativeedge>.

CALL FOR VOLUNTEERS

The Greater New York Chapter of AFP welcomes volunteers. At present, there are a number of Chapter committees or Task Forces that have vacancies. Visit our website for full committee descriptions or contact Holly Koenig at chapter headquarters: (212) 297-2123.

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IN NEW YORK**

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