



2017 Annual Report

The Association of Fundraising Professionals Greater Cleveland Chapter is dedicated to elevating the fundraising profession, providing valuable educational programming to our members and serving the community by promoting ethical and professional practices in philanthropy.



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The Nord Center

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Message from the President

AFP Greater Cleveland Chapter is glad to be able to present this year its first annual report. We recognize that at points so many different activities are going on within our ranks that it's hard to know about all of it, much less to convey it to our members and other stakeholders in the community.



The value of each individual's AFP membership is highly personal. What we want out of it and what we put into it varies widely. For me, who has spent my entire career in small shops, getting to know colleagues who do what I do, having trusted resources to validate my workplaces' practices and gaining the opportunity to grow as a leader have been of primary importance.

For some, finding a mentor who can support your development as a professional may be important. For others, networking to become familiar with the plethora of wonderful organizations throughout our area can be a benefit. For still others, access to AFP International may help you get your work done without reinventing the wheel with its trove of online resources.

I can't encourage you enough to take an active role in the chapter. This often starts by becoming involved in a committee. Getting to know fellow fundraisers and working with peers is rewarding and fun. While our officers change, our chapter administrator is a constant, is the central hub for all chapter operations and can direct you to committee chairs or give you information on the chapter's activities. Our administrative team is just an email away at admin@afpcleveland.org.

Please let us know what your needs and interests are. If there's something you want to learn about that you're not seeing in our lineup of professional development sessions, we want to hear from you.

Thank you for all you do to support your organizations and causes. Remember, AFP Greater Cleveland Chapter is here to support you.

Betsey Kamm, MBA, CFRE
The Nord Center
2017 AFPGC President

February - Foundation Funding Workshop

Donae Ceja, Women's Network of Northeast Ohio
Stephen Caviness, The Cleveland Foundation
Debra Hershey Guren, The Hershey Foundation
Dave Holmes, Foundation Center
Kristen Lewis, Fairmount Santrol
Mark Sutherland, The Lubrizol Foundation
Dione Demitro, Lakeland Community College

April - New Methods of Fundraising

Indigo Bishop, Cleveland Action Strategist
Amy Neumann, Advance Ohio
Laura Eha, Everything But The House
Danny Williams, Eliza Bryant Village
Dave Holmes, Foundation Center

May - Foundation Funding Workshop

Donae Ceja, Tactical & Practical LLC
Dawn Golba, The Nord Family Foundation
Dave Holmes, Foundation Center
Patricia O'Brien, Stocker Foundation
Linda Ong Styer, The Community Foundation of Lorain County
Peter Schindler, Community West Foundation

June - Giving USA

Paul Clark, PNC Bank
Peter Fissinger, Campbell & Company
Randell McShepard, RPM International, Inc.
Susan Zanetti, Baldwin Wallace

July - Summer Social

September - Fundraising Boot Camp & Career Fair

Brad Milius, Cleveland Clinic
Jessica Ford, Oberlin College
Jack Ricchiuto, Thrive Cleveland
Evan Ishida, Thrive Cleveland
August A. Napoli, United Way of Greater Cleveland
Anne-Marie E. Connors, MA, Benjamin Rose Institute on Aging
Lauren Steiner, JD, Grants Plus
Naomi Worthington, Grants Plus
Dave Holmes, Foundation Center

December - Annual Meeting

Mary Lavigne-Butler, Greater Cleveland Food Bank
Kristin Warzocha, Greater Cleveland Food Bank
Lindsay Marciniak, CCS Fundraising

The Professional Development Committee is responsible for the selection, development and scheduling of professional fundraising education programs and training. Our goal is to offer a variety of education opportunities to help our members achieve their advancement goals.



Our recent focus has been to offer more geographically diverse programming to accommodate AFPGC’s membership area which covers Cuyahoga, Geauga, Lake and Lorain Counties. We certainly achieved this goal due to our new partnership with The Foundation Center. I’d like to thank David Holmes, Midwest Lead for Foundation Center, for putting together three amazing programs in February, April and May! The speakers and panelists were engaging and informative and we thank them for participating!

Thank you to committee members Dione Demitro, Jessica Ford, Jessica Malone, Lindsay Marciniak, Sharon Martin and Tim McCormick for their efforts and support in making 2017 a memorable program year! A shout out goes to Doug Kohl and his team at the YMCA Greater Cleveland for hosting and presenting the October program.

It has been my pleasure to serve as VP Professional Development for AFPGC!

Fran Anderson
List Marketing Group, Inc.
2017 AFPGC VP Professional Development

Save the Date!

New Methods of Event Fundraising - What’s New and What’s Hot

April 27, 2018 · Location TBD

Foundation Fundraising: What’s New and What’s Next in Lake County - and Beyond!

May 10, 2018 · Lakeland Community College

Nonprofit Career Boot Camp

September 14, 2018 · Location TBD

AFPGC Clam Bake Social

October 4, 2018 · Location TBD

National Philanthropy Day®

November 2, 2018 · Renaissance Hotel Cleveland

Annual Meeting

December 6, 2018 · Cleveland Yacht Club



National Philanthropy Day[®]

Chaired in 2017 by Betty Vrcek and co-chaired by Fran Anderson, National Philanthropy Day[®] (NPD) was again held in Downtown Cleveland at the Renaissance Cleveland Hotel. Our annual November recognition of the contribution of philanthropy to our community featured seven awards, given to people nominated by AFP Greater Cleveland members and selected by the Awards Committee.



National Philanthropy Day[®] is AFPGC's largest annual fundraiser, with proceeds benefiting member scholarships and programming. The day celebrates the philanthropic efforts and the generosity of this community that enriches our world and our lives.



This year's NPD was a tremendous success. To keep that momentum moving forward, we encourage chapter members to begin thinking about whom your organization should nominate for an NPD Award for the 2018 event. We also encourage you to volunteer and get involved with the NPD Committee. Please contact the 2018 Chair, Fran Anderson, at fran@listmarketinggroup.com.

Betty Vrcek **Fran Anderson**
University Hospitals **List Marketing Group, Inc.**
2017 AFPGC NPD Chair **2017 AFPGC NPD Co-Chair**

Major Sponsor



University Hospitals

Supporting Sponsors



Supporting Media Sponsor **Supporting AV Sponsor**



Resource Partners

AGC The Creative Advantage · Campbell & Company · FORM Foundation Center · Greater Cleveland Grant Professionals Association
J&M Business Solutions, LLC · LaCentre Conference and Banquet Facility
Marketing Communication Resource, Inc. · Massillon Plaque
NOCGP · Streamline Technology · Zinner & Co.





Awardees

Outstanding Philanthropist Leadership Award **Ray & Eleanor Smiley**

Nominated by: Shawna Whitlock, Notre Dame College



Corporate Leadership Award **RPM International Inc.**

Nominated by: Melanie Shakarian,
The Legal Aid Society of Cleveland



Foundation Leadership Award **The Kent H. Smith Charitable Trust**

Nominated by: Sherri L. Bishop, Esq., University Hospitals



Outstanding Fundraising Volunteer Award **Richard W. Pogue**

Nominated by: Sherri L. Bishop, Esq., University Hospitals



Youth Group in Philanthropy Award **Youth Challenge Volunteer Committee**

Nominated by: Mary Sue Tanis, Youth Challenge



Outstanding Fundraising Professional Award **Lauren Steiner**

Nominated by: Marge Zellmer



AFPGC Lifetime Achievement Award **Tony Poderis**

Nominated by: Karen Owens,
Resource Development Network

The following outstanding roster of volunteers was responsible for a highly successful National Philanthropy Day® in 2017:

Betty Vreck, Chair · Fran Anderson, Co-Chair
Bernadette Boguski · Beth Darmstadter
Pat Egan · Jessica Ford · Jane Furth
Karen Bain Hiller · J&M Business Solutions
Betsey Kamm · Jessica Malone · Sharon Martin
Mary Ann Meitin · Joan Palumbo
Lynne Robie · Melissa Z. Shelton
Lisa Paul Sierk · Calvin Wood
Melissa Adell Woodard · John Zajc

National Philanthropy Day® by the Numbers

- Resource Partners: 16
- Table Sponsors: 50
- Luncheon Attendees: 526
- Panel Discussion Participants: 225
- Honor Roll Honorees: 39

Total Amount Raised for the
AFPGC Chapter: \$13,937.94

Membership

We ended 2017 with 353 members. All membership renewals and new membership applications are processed through AFPI and there have been some struggles in getting accurate data in a timely fashion which may be the reason for the decline in numbers reported.



Several of our committee members and board members, along with our amazing staff, did a wonderful job of recruiting and helping retain members. Welcome letters were sent to all new members and letters and calls went out to many of our lapsed members. Membership messages were included on program mailings and emails. A special mailing with a discount coupon offer was sent via AFPI to many prospective members working in conjunction with our program committee chairperson and office staff to generate the mailing list. The membership committee generated several ideas for retention and recruitment that hold strong potential for implementation in 2018.

One of the benefits of membership in the AFP Greater Cleveland Chapter is our mentoring program. See Mentor Program report for more details.

Another benefit of membership in the AFP Greater Cleveland Chapter is the scholarship program. In 2017, scholarships totaling \$1609.99 were awarded to four different members. Three of the scholarships were for memberships and one was for attendance to the International Conference.

Special thanks to our AFP staff, Sheri Glaze, special program area chairs, Debbie Miller, Mentor Program, and Jessica Ford, Scholarship Committee as well as our Board and Membership Committee members who participated in meetings and helped to generate and implement ideas: Sharon Martin, Allison Tillinger, Fran Anderson, Sandy Lucas, and Calvin Wood.

Pat Milenius
The Congregation of St. Joseph
2017 AFPGC VP Membership

Members - Join a Committee!

AFP of Greater Cleveland's volunteers are the strength and soul of our organization. You can enhance your membership experience by joining one of the following committees.

Communications · Membership · National Philanthropy Day®
Professional Development · Resource Development

Visit www.afpcleveland.org/get-involved/committees/ to learn more.

Mentoring

The AFP Mentoring Program is an opportunity for members who are newer in the profession to be matched one-on-one with veteran fundraising professionals for one year. Mentors offer guidance on specific areas of fundraising, answer questions the mentees may have about projects they are working on and often provide informal career counseling. This year's class of mentees consisted of seven people who had worked professionally as fundraisers from one to five years. They came from a variety of sectors in the non-profit community including health & human services, religious, education, and development. One of our mentees appreciated the professional and personal guidance she received as she explored new career opportunities.



Special thanks to those members who served as mentors during 2017: Beth Darmstadter, Pat Egan, Annie Heidersbach, Jim Hickey, Mayme Patthoff, Diane Strachan and Sue Starrett. This very talented group also comes from a variety of organizations including health care, education, the arts, a retirement community and consulting. Throughout the year, they met individually with their mentees and corresponded by phone and email to provide guidance and support.

Mentors and mentees are matched based on the professional strengths of the mentors and needs of the mentees. We also attempt to match organizations within the same sector or geographic location, although it is not always possible to match people according to all factors.

If you would like to take part in our chapter's mentoring program, please visit <http://www.afpcleveland.org/get-involved/mentoring/> to complete a mentee or mentor application. Details about the program and its requirements can be found at the website.

Deborah Miller
Baldwin Wallace University
2017 AFPGC Mentoring Committee Chair

Flash Traffic is Now AFP in the CLE

AFPGC's bi-weekly newsletter, *AFP in the CLE*, keeps members in touch with what is going on with AFP and the Philanthropic Community. If you have an article or information to submit, please send an email to admin@afpcleveland.org.



Resource Development

Resource Development showed strong increases in 2017. Detailed reports for BE the CAUSE and NPD follows this summary.

This is the first year that dollars raised for our BE the CAUSE Campaign are directly managed by AFPI. Our Chair, Linda Prosak, did an outstanding job promoting the campaign among our Board and chapter members. We not only met our goal, we exceeded our goal, which qualifies our chapter for a larger grant from AFPI. Thanks to Linda for her hard work!



Once again, the Chapter hosted a successful National Philanthropy Day®. Guided through the able leadership of Betty Vrcek as Chair, and the incredible support of the NPD Committee, a renewed focus on sponsorships for NPD and throughout the year, chaired by Tim McCormick, the event was well attended, executed flawlessly and raised increased dollars. Innovative changes to the event and sponsorships helped make the event a success. Thank you to an incredible team!

Other income increases were realized through paid ads on our jobs board. Over 270 job postings brought in \$24,000 in increased dollars to the chapter this year. This revenue area fluctuates with the ebbs and flows in the economy. We are fortunate that non-profits are in a hiring mode, this is not only good for our bottom line, it's great for our profession.

Laura Frye
Hospice of the Western Reserve
2017 AFPGC VP Resource Development

BE the CAUSE

BE The CAUSE, the annual giving campaign for the AFP Foundation for Philanthropy, exceeded our fundraising goal. Thanks to the 46 donors, our chapter raised \$7800.04 to support the work of the AFP Foundation and our local chapter.

Funding will be used by our chapter to support educational programs, events, training and scholarships. Your generosity will also support innovative programming, research and advocacy by AFP International.

We appreciate your support. Thank you for making a difference in helping our chapter advance philanthropy and our profession.

BE  **CAUSE**
Empower. Strengthen. Transform.

Linda Prosak, CFRE
2017 AFPGC BE the Cause Campaign

Accountability

As of December, 2017, AFPGC was having another fine year financially. The balance sheet continues to be quite strong supported by the growth in cash, which is attributable to the increase in net income over 2016. Furthermore, receivables have been well-managed and are under control in the areas of National Philanthropy Day® and AFP's fundraising efforts (BE the CAUSE). The organization is fiscally well-positioned going forward into 2018.



The Chapter's income through October was driven predominantly by revenue from National Philanthropy Day®, sponsorships, membership and programming. This diversification strategy has proven to be a formula for success inasmuch as income exceeded budget for this year and actual figures in the previous year. The success of National Philanthropy Day® and positive variances in programming and membership offset the negative variance in general sponsorships. This culminated in total income that was consistent with budget. The fact that expenses were well below budget resulted in net income that exceeded budget and surpassed the previous year's performance.

Mitchell Wasserman
The Wasserman Consulting Group, Inc.
2017 AFPGC Treasurer

2018 National Philanthropy Day® Award Nominations

Now is the time to applaud those that have helped your organization by nominating them for a National Philanthropy Day® Award. The Association of Fundraising Professionals Greater Cleveland Chapter presents seven awards to recognize outstanding achievement by individuals, youth groups, foundations, corporations and fundraising professionals. Here is a list of the selection criteria.

The National Philanthropy Day® Award categories are:

- Philanthropist Leadership Award
- Corporate Leadership Award
- Foundation Leadership Award
- Outstanding Fundraising Volunteer
- Youth in Philanthropy Award
- Youth Group in Philanthropy Award
- Outstanding Fundraising Professional



**National
Philanthropy
Day**

AFP Greater Cleveland

Nominations open April 2nd. To nominate someone for a National Philanthropy Day® Award visit www.afpcleveland.org/national-philanthropy-day/nominations

The deadline for all submissions is: May 31, 2018 by 3pm.

All nominations must be submitted online.

For any questions or concerns please contact Sheri Glaze at the AFP Cleveland office admin@afpcleveland.org or 216-696-1613.

AFP International represents more than 33,000 members in 233 chapters throughout the world. AFP Greater Cleveland Chapter enjoys a roster with 353 current members representing more than 200 organizations in Northeast Ohio. Chartered in 1967, the Greater Cleveland Chapter was the 4th chapter in the United States making 2017 our chapter's 50th anniversary.

Our chapter strives to excel in meeting AFP International goals as we carry out the AFP vision and mission. Our Board of Directors ensures that we meet the AFPI Accord standards, which maintains our non-profit IRS tax-exemption status under the Group Ruling. We received both the Ten Star award and Friends of Diversity designation in 2017, placing AFPGC in the top ten percent of AFP chapters.

Our chapter maintains a good financial position with small reserves to insure our long term presence in Greater Cleveland.



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