

V O I C E

News of the Long Island Chapter of the Association of Fundraising Professionals

The Association of Fundraising Professionals (AFP), which represents more than 30,000 members in 197 chapters throughout the world, advances philanthropy through advocacy, research, education and certification programs. AFP fosters the professional development of fundraising professionals and promotes ethical standards in the fundraising profession.

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Philanthropy Day 2010 Good People...Good Causes – New Place...New Workshops

by Patricia Chambers Daly, *Philanthropy Day 2010 Chair*

Someone asked me, "Why are you so active with AFP and why did you even think of becoming Chair of Philanthropy Day? What benefit does your organization reap from this?"

I was a little dumbfounded because I have always been active in both the Chapter and Philanthropy Day and have always felt that it was where I needed to be. I believe AFP plays an integral role in my success as a development professional and I have developed relationships with funders over the 20 years that I have been active in AFP which has resulted in support for the organizations that I have worked for. I also think that, as my boss Sister Mary Hughes OP has told me many times, being a member of the Long Island Chapter and taking on the challenge of Philanthropy Day Chair gets the Dominican Sisters of Amityville's name out there where it needs to be.

Philanthropy Day is the culmination of all of these thoughts. In one day, we provide some

of the best networking opportunities and workshops to help development professionals and volunteers improve their fundraising skills. The quality of our faculty is above par. This year's Education Committee has done an excellent job of reshaping how we present the various topics and recruiting new faces to lead the workshops. I am sure you will be as

excited as we are to hear from some of the best in the business.

We have been drumming into your heads about our new location – the Huntington Hilton. We think you will be pleased with the new set up and, for many of you, the more central location.

(CONTINUED ON PAGE 6)



Philanthropy Day 2009: The judges at The Gift...The Ask...The Why are enthralled by the winning presentation.

2010 Chapter Board

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Usdan Center for the Creative & Performing Arts

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The Cenacle Sisters

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Fran Karliner
Long Island Crisis Center

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*Long Island Cares,
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Barbara Travis
United Way of Long Island

Judith Lach Veeck
*Cornell Cooperative Extension –
Suffolk County*

Robert Vitelli
*Long Island Gay & Lesbian Youth
(LIGALY)*

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A Message from the President

by Patrice Frank
*Director of Development,
Usdan Center for the Creative and Performing Arts*



Dear Friends and Colleagues,

As I sit to write this final letter, I must confess that looking back at my two years as Chapter President became a surprisingly sentimental experience. Serving development professionals, all so dedicated to their craft and the importance of the work we do, has been inspiring and invigorating, and I recommend it with all my heart.

It is my belief the reason that our chapter has flourished during one of the toughest economic periods in our nation's history has been a direct result of the incredible support we offer our members. In a tough world, AFPLI is an oasis of professionalism, camaraderie and encouragement.

To know that each of us is part of a larger group who have an instant understanding of the challenges we face on a daily basis – and who are always willing, immediately, without question, to lend an ear, offer solutions or sometimes, simply to listen and commiserate – provides us with strength that makes all of us better as professionals and as people.

During the last two years, our chapter attained the "10 Star" designation and celebrated AFP's 50th anniversary, when we honored several multiple generations of development professionals, demonstrating how the torch of fundraising is being passed along with great success. We also maintained chapter membership services at an incredibly high level, and continued to make Philanthropy Day the premier educational and recognition event of the philanthropic community here on Long Island.

I was always so proud to represent AFPLI when attending national and international AFP events, where our chapters' efforts and accomplishments are on par with even the largest city chapters.

As a chapter, let us applaud the efforts made to enhance our diversity, the re-birth of our legislative breakfast, efforts to bring new members into the fold and the courageous step we took with the creation of the Ask, the Gift, the Why workshop at Philanthropy Day. Our members and leaders have not shied away from embracing change and making new things happen. I encourage each of you to take the step of doing the same, within the chapter and your own careers.

As a final note, I want to encourage all to become as active as you can in AFPLI. The more you are involved, whether as an active member or by taking a vital leadership position, the more you will grow and learn – and the more we will learn from you!

Thank you for the privilege to serve,

Patrice Frank

“Sometimes, there may be better gift choices than what the donor wants to do. Sometimes you push and sometimes you just say thank you”.

Jim Meyer



I just advised a donor for a sleep away camp. The donor wanted to join the legacy society but had certain concerns. He wanted to give a specific amount and make sure that the ultimate size of the gift was both guaranteed and substantially larger than the original gift. He did not want to do a gift where if his circumstances changed, he either changed his mind or did not fulfill his pledge. He wanted to use a very conservative approach which is similar to his investment style, he wanted the gift to be simple to understand, and he is not insurable but he is young (mid-forty's). After a lengthy discussion we came down to his "happy zone" whereby he would purchase US Government 30 Year Zero Coupon Bonds which he would donate to the charity with the proviso that the bonds be held to maturity. The \$7,000 purchase would yield a little over \$35,000+ and would qualify the donor for the legacy society. The donor would be able to write off the donation based on the fair market value of the bonds on the day of the gift. The ultimate amount going into the scholarship fund will be \$35,000+ (substantially higher than the original gift; once completed he could not change his mind should his circumstances change, and everything is guaranteed). I said, "thank you".

Of course, there were methods that would have yielded a larger gift with more of a tax deduction. There were some complicated gifts that would have worked (if one looks at present dollars, the ultimate gift is really not large). Some version of annuities might have done more, but we never ran the illus-

trations etc., etc., etc. Why not push for something else? In the first place, you really have to listen to your donors. But more importantly, the donor will continue his annual gift (discussed) and further, if his circumstances allow, he will do another planned gift down the road because he was happy.

Some of you may have heard the term floating around in the planned giving world of "Creative Bequests". A bequest is indeed a bequest no matter how you paint it, but the term "creative" is interesting. Often times the "creative" part simply means that instead of the bequest being revocable, language has been added that makes the gift irrevocable. Some charities are moving to this irrevocable language for their own piece of mind as well as long term planning.

A gift that has not been used a lot recently (from my discussions with planned giving specialists) is the flexible endowment. It is a technique which incorporates a current/ongoing gift and a bequest. Let us say that a donor wants to leave a million dollar gift to endow a program or some equipment, but they do not have the cash flow to do the entire gift now. The donor does not have the ability to write a check for the million dollars, but they do have the ability to give \$50,000 a year. The donor commits to giving \$50,000 a year and if they live for twenty years the pledge is fulfilled. The donor also sets up a bequest from their estate to pay the difference if they pass away during the twenty years; i.e. they live ten years and therefore have given \$500,000 and then their estate fulfills the pledge with the other \$500,000. This is a technique which many donors would like if presented to them.

If you have any questions or wish planned giving material to be sent to you, please call me at 631 390-4300.



James E. Meyer is Partner,
Greco Planning Group, Inc.

News & Notes

Jennifer S. Goodwin, CFRE has a new title – Associate Vice President for Development & Campaign Operations at Long Island University

Fran Karliner is now the Director of Development at Long Island Crisis Center.

Gregory Monfiletto is now the Director of Development at Jefferson's Ferry Lifecare Retirement Community in South Setauket

Barbara S. Travis is now the Vice President for Leadership Giving and Donor Development United Way of Long Island.

Congratulations

Congratulations to **Randi Dresner, CFRE**, President & CEO, Island Harvest and **Robert Mottola**, Vice President, Development, Marketing & Community Relations, Huntington Hospital. Randi and Bob were recently honored by Molloy College's Division of Continuing Education and Professional Development with the Outstanding Faculty Member Award. Randi and Bob are longtime instructors and experts in the field of development and marketing as well as former AFPLI board members.



New Members

Elizabeth Benham
BPW International
P O Box 537
Babylon, NY 11702

Erica Brower
Long Island Business News
2150 Smithtown Avenue
Ronkonkoma, NY 11779-7348

Dianne Cali
The Leukemia & Lymphoma Society
555 Broadhollow Road Suite 403
Melville, NY 11772

Gerard Dolan
Dolan Associates
16 Center Street
Northport, NY 11768

Anna Maria Fenimore
8 Country Meadow Court
Melville, NY 11747

Beth Gazes
99 Darrow Lane
Greenlawn, NY 11740

Kathy Genovese CSW
Guide Dog Foundation/
America's Vet Dogs
P O Box 81
Oyster Bay, NY 11771

Fred Goldfarb
318 Rolling Street
Malverne, NY 11565

Christine Golub
John W Engeman Theater
250 Main Street
Northport, NY 11768

David Hymowitz
Mental Health Association
of Nassau County
16 Main Street
Hempstead, NY 11550

Carolyn Levering
National Marfan Foundation (NMF)
22 Manhasset Avenue
Pt. Washington, NY 11050

Ruth McDade
Clubhouse of Suffolk
939 Johnson Avenue
P O Box 373
Ronkonkoma, NY 11779

Robert McLaughlin, Jr.
86 Knollwood Drive
Carle Place, NY 11514

Michael Mihaley
AHRC Suffolk
2900 Veterans Memorial Hwy
Bohemia, NY 11716-1953

Joan Urbanowski
Farmingdale College Foundation
2350 Broadhollow Road
Farmingdale, NY 11735

Please register in advance for monthly meetings!

Are you taking advantage
of the many benefits of your
AFPLI membership???

Visit www.afpnet.org

Check out the AFP Resource Center. They have produced comprehensive "Hot Topic" pages featuring in-depth guidance and information on key fundraising areas that members have identified as being most important right now.

This is just one of the many benefits and resources that AFP has to offer!

Fourth Annual

Legislative Breakfast

Tuesday, September 21st

“Not For Profit Self Sufficiency in Rough Economic Times”

Sponsored by:

Karma411

Committee – Kathy Brand, Chair, Mary Garrote, Gina La Vecchia

About 70 not for profit development professionals from around Long Island attended the legislative breakfast featuring moderator, Jim Morgo, former SC Commissioner of Economic Development, former President & CEO of LI Housing Partnership, presently Sr Economic Development Coordinator of the Town of Brookhaven. The esteemed panel was comprised of:

- Patrick Foye, Deputy County Executive, Economic Development, Nassau County
- Yves R. Michel, Commissioner of Economic Development, Suffolk County
- Michael Nawrocki, CPA, Managing Partner, Nawrocki Smith LLP
- William Weir, Managing Partner, Public Finance, Nixon Peabody

The focus of the legislative breakfast was to inform non-profits how to maximize their potential by working with local economic development offices—through municipalities and counties. Discussion focused on financing opportunities, grants, revenue based budgets and successful ways to work with local government.

See our calendar on the back page for upcoming monthly education meetings!

Looking for a way to become more involved in AFP?

AFPLI is currently seeking nominations for its board of directors. If you know of an individual who is an appropriate candidate and has the desire to serve, please visit www.afpli.org for the application and submit his or her name. Self-nominations are encouraged. Board members are elected to serve a one year term. AFP Board service provides the opportunity to apply leadership skills, develop relationships with other talented professionals, and expand as a fundraiser. We invite you, or your nominee to become personally involved and continue this proud tradition.

A member of the Nominating Committee will contact each candidate to discuss his or her willingness to serve and areas of special interest. Please note that there are a limited number of Directorships available; therefore an application does not guarantee nomination to the Board.

*The Deadline for Nominations is
October 29, 2010*

James R. Rennert, CFRE
Chairperson, Nominating Committee
Immediate Past President

2010 Nominating Committee
Members:

Barry Cosel-Pieper, CFRE

Patrice Frank

Jaclynne M. Jacobs

Fran Karliner

George Richardson, CFRE

Barbara Gill Rogus, CFRE

Marilyn Weissman

Become a Fan!

Join AFPLI on Facebook and LinkedIn! Search “Association of Fundraising Professionals Long Island” and join the groups to get updates, information, and reminders on AFPLI’s programs including educational breakfast meetings, mentoring opportunities, continuing education, and more!



Philanthropy Day

(CONTINUED FROM PAGE 1)

I am looking forward to Stephen Post's inspiring and energizing keynote address. I've known for a long time that it is "good to be good." But now we get to hear it from someone who has made a career out of studying it and practicing it.

And, the honorees! Talk about inspiring! From the retired Chairman and founder of Roslyn Savings Foundation to the elementary school student who has raised \$135,000 from a lemonade stand, we have 5 individuals and 1 corporation who representative the best of the "good people" doing great work for "good causes" in 2010.

I have so many people, companies and organizations to be thankful for who have come together to make Philanthropy Day 2010 an amazing success. The Philanthropy Day committee members are a dedicated group of volunteers who somehow find the time to attend to all the details that this event commands. Our sponsors, once again led by our Presenting Partner Bank of America, and our exhibitors,

help to make this fundraising event a success for the Chapter. I cannot express our gratitude enough for their support.

I look forward to seeing many of you at Philanthropy Day. We have tried very hard to provide a variety of workshops and events for the newest in our profession to our most senior professionals. I urge you, for the sake of your organization, to attend. I can promise you will take back to your workplace enough new ideas to make it worth your time.



Patricia Chambers Daly is Director of Development for The Dominican Sisters of Amityville

Keynote Speaker

Stephen G. Post is Professor of Preventive Medicine and Director/Founder of the Center for Medical Humanities, Compassionate Care, and Bioethics at Stony Brook University. He is a leader in the study of altruism, compassionate health care, and love in the integrative context of scientific research, health care delivery and outcomes, philosophy, and religious thought.



Stephen G. Post

Post was previously Professor in the School of Medicine, Case Western Reserve University, and Senior Research Scholar at the Becket Institute of St. Hugh's College, Oxford University. He is a Senior Fellow in the Center for the Study of Law and Religion at Emory University, and a Senior Advisor for the Positive Psychology Center at the University of Pennsylvania. Post is a Trustee of the John Templeton Foundation, Founder of the Institute for Research on Unlimited Love and author of *Why Good Things Happen to Good People* (with J. Neimark). Post is the primary author of over 150 articles in peer-reviewed journals, has written seven scholarly books on altruism, compassionate care and love, and is also the editor of nine other books.

A Special Thanks to Bank of America

The AFP Long Island Chapter salutes Bank of America for their generous support of Philanthropy Day as a Presenting Partner. For many years, Bank of America's belief in and support of philanthropy has allowed each of us in the fundraising profession to be the best we can be for the organizations we work with and for. On behalf of our 300+ membership, our sincere thanks!

Patricia Chambers Daly
Philanthropy Day Chair

Patrice Frank
AFPLI Chapter President



Philanthropy Day 2009 Chair Fran Karliner thanks Lorraine Aycock, representing Presenting Partner Bank of America

This Year's
Philanthropy Day
Honorees



Joseph Mancino



MSC Industrial Supply Co.



Alan J. Kelly



Kyle Orent



Frank Pelliccione



Ann McDermott-Kave

Join us at Philanthropy Day to honor the following individuals and company for their outstanding contributions to the not for profit community:

**Horace Hagedorn Outstanding Philanthropist
Joseph L. Mancino**

Former Chairman and CEO of The Roslyn Savings Bank, Joseph L. Mancino is recognized across Long Island as a visionary and a leader. It was through his efforts that The Roslyn Savings Foundation was created, structured to ensure philanthropic giving in perpetuity, irrespective of economic cycles.

**Outstanding Corporation
MSC Industrial Supply Co.**

Since its 1941 founding by Sidney Jacobson, MSC Industrial Supply Co. Inc. has set the industry standard for quality, selection, and customer service. A standard of their culture is their commitment to serving the communities where associates live and work. Associates are encouraged to participate on teams that help further MSC's Corporate Citizenship efforts.

**Outstanding Fundraising Executive
Alan J. Kelly**

Alan Kelly has been the Vice President for Development and Alumni Affairs at Hofstra University since 2005. In the course of his career, Mr. Kelly has provided professional counsel to dozens of clients in the areas of higher education, and religious and health organizations, raising more than \$450 million.

**Leaders of Tomorrow
Kyle Orent**

Kyle Orent began his fundraising efforts at age 7, when he asked his parents for a lemonade stand to help raise money for charity. He researched several not-for-profits and determined that Canine Companions for Independence (CCI) was a perfect match. Since that time, he has raised \$135,000 through his lemonade stand, matching donations, online auctions featuring celebrity items, and donations.

**Outstanding Fundraising Volunteer
Frank Pelliccione**

Frank Pelliccione is currently Vice President of Business Development at Flushing Bank. Throughout Mr. Pelliccione's professional career, he has been extremely active with not-for-profit organizations. Mr. Pelliccione sums his volunteer activities in the following way: "Life has been good to me and I want to give back to others and help people...to really make a difference in their lives!" He has done all that—and more.

**The Gilbert Tilles Award
Ann McDermott-Kave**

Ann McDermott-Kave's passion and commitment for helping the community is demonstrated through her involvement with many not-for-profit organizations on a professional and personal level. She played an integral role in establishing the OSI Pharmaceuticals Foundation in 2005, after heading up the OSI Pharmaceuticals' Community Relations function and leading Human Resources as its Director from 1993-2001. Ann serves on numerous boards, volunteers, teaches and hosts a Fresh Air Fund child in her home every summer.

New Location!
Huntington Hilton, Route 110, Melville

Calendar

NOVEMBER						
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- November** 5 8:00 AM AFPLI Board Meeting
- 15 4:00 PM Philanthropy Day Meeting
- 16 6:30 PM "Special Events & Sponsorships" Course begins
- 19 **ALL DAY** **Philanthropy Day at Huntington Hilton**
- December** 3 8:00 AM AFPLI Board Meeting
- 21 8:00 AM Professional Education Meeting
- January** 6 6:30 PM "Building an Outstanding Volunteer Program" Course begins
- 7 8:00 AM AFPLI Board Meeting
- 18 TBA **AFP Annual General Meeting/Installation of Officers***
*Tentative Date
- February** 4 8:00 AM AFPLI Board Meeting
- 15 8:30 AM Professional Education Meeting
- 15 6:30 PM "Establishing & Managing a Planned Giving Program" Course begins
- 17 6:30 PM "Positioning Your Organization Through Marketing & Public Relations" Course begins
- March** 4 8:00 AM AFPLI Board Meeting
- 15 8:30 AM Professional Education Meeting
- 22 6:30 PM "Building the Ultimate Board of Directors" Course Begins
- 24 6:30 PM "The Art & Skills of the Grant Process" Course begins
- April** 1 8:00 AM AFPLI Board Meeting
- 19 8:00 AM Professional Education Meeting "Planned Giving"

For further information and reservations please call the AFPLI office 631/249-5008.

Due to rising costs, the reservation and cancellation policies for monthly educational meetings will be strictly enforced. Cancellations received after the cut-off date cannot be credited or carried over. If you make a reservation and don't show, you will be billed, since guarantees to the hotel must be met. Please help us maintain monthly meeting costs.

AFPLI

V O I C E

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