Faster! Stronger! Smarter!

*Ideas to Increase Your Annual Fund Revenues*

*Thursday, March 23, 2006 • Little America Hotel*

*Registration begins at 11:30 am • Program starts at noon*

Three of Utah’s most successful development professionals will give you ideas on how to increase your annual giving program revenue success while the competition for funding keeps getting stiffer. You’ll learn ways to sharpen your mailings, enliven your special events, increase your personal solicitations and get a better return from foundation proposals. This luncheon conversation is designed to give you practical advice and ideas that are based on over 50 years of combined experience.

Our speakers will be:

- **Rebecca Terry Heal**, Director of Development, Utah Youth Village. Formerly with the Salt Lake Public Library System, KUER, Ballet West and the Utah Arts Festival.
- **Michelle Thompson**, Principal at Peacock Events, Inc. Former Fund Raising Events Director, No More Homeless Pets.
- **Maxine Margaritis**, Director of Development, Salt Lake Arts Academy. Formerly worked as a program and proposal development consultant and with the American Red Cross.

**UNA Training Opportunity**

On March 23 and 24, the Utah Arts Council is sponsoring “Capital and Endowment Campaigns for Smaller Organizations” at the State Archives Building from 9-5:30 p.m. Presenters will be Linda Lysakowski, ACFRE and Sue Kreeger, CFRE from the firm Capital Venture Fundraising. If your organization is considering a capital campaign, don’t miss this chance to learn about the planning skills necessary for a successful capital campaign. Visit utahnonprofits.org for more information. *NOTE: This workshop will break from 11:45 a.m. to 1:30 p.m. for the USFR Luncheon on March 23.*
Fundraising Matters is the quarterly newsletter of the Utah Society of Fund Raisers (USFR) and is published in January, April, July, and October as a service to its members.

USFR is a professional organization committed to serving the fundraising profession in Utah through education, annual conferences, networking opportunities, trend updates, and many other services. Annual USFR membership dues are $40.00. For more information about how you and your organization can benefit through membership in USFR, log on to our website at USFR.org.

Articles, information and photographs from members are welcome. Copy and sponsorship deadlines are the 1st of December, March, June, and September. Direct all newsletter inquires and submissions to jparsons@utahdiscoverycenter.org.

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The USFR calendar includes all postings submitted to USFR.org through March 11, 2006. To post your fund raising event to the USFR statewide events calendar, log on to our website at USFR.org.
President’s Message - Please Read for Important Chapter Information

Fund Raisers in Utah are being asked to make a historic decision. Utah is the only state in the union that does not have a chapter for the Association of Fund Raising Professionals (AFP). The debate whether USFR satisfies the need for this association has been held in Utah for a long time. There are currently 12 members of this association within our state and they urged us to discuss creating a chapter.

Recently, the VP of membership and the Western Area Manager for Chapter Services made a presentation to the Board regarding creating a chapter of AFP in conjunction with USFR. While the board invested several hours in the discussion, this debate belongs in your hands. You need to make the decision whether the local programming, newsletter, website and other member benefits serve you well or if you would like to be associated with a much larger organization (some 27,000 members in the US, Canada, Asia and Europe.)

Some of the benefits we discussed include a code of ethics which is enforced, an international conference held annually, a magazine for the industry entitled Advancing Philanthropy, advocacy at the federal level and a close eye on legislation that would alter our profession, a resource library and list serve that could assist in researching topics and questions related to our work, media relations and help with media relations, strategic planning and workshops. Our mainstay programs such as lunches, the newsletter, Fund Raising Day, Philanthropy Day and the activities of USFR would continue to exist.

Utah could also consider allowing AFP to form a chapter and make no changes to USFR. This model would have Utah run two separate organizations.

What is the hurdle of forming an AFP chapter in Utah? One issue is the price of the dues. Your current USFR membership is $40 per year. AFP is $220 plus chapter fees. If we as a state decided to move toward an AFP chapter together, our individual fees (in additional to the $40 local dues) would be $100 the first year, $150 the second year, and $220 per year thereafter. These hurdles include the questions; how much are you willing to invest in your professional development? What will the local non-profit community invest in their professionals’ membership with an international organization?

We will have the President of AFP travel to Utah in the month of May and hold this debate in a public setting. Regardless the outcome, it is time to reexamine our current structure and how you the membership feel about the services provided for the cost. I welcome all of you to a special luncheon in May and to this important debate. Jump on the AFP web site at www.nsfre.org and review their member benefits for yourself.

I will let you know when travel arrangements are complete and we can have this discussion together. In the meantime, I welcome your input and suggestions. Thank you for your careful consideration of this historic decision.

Nancy

Take the Time to Make Your Events Known at USFR.org!

Are you trying to plan a fund raising event for your organization? Does anyone else is having an event that same night? Are your donors going to be available to attend your event? Where do you go to find out? Of course, the

USFR Non-Profit Event Calendar
(it is updated weekly, so check back regularly)

- To VIEW the calendar, visit www.usfr.org/calendar/calendar.asp
- To POST to the calendar, visit www.usfr.org/forms2/addevent.asp

And, while your visiting USFR.org, stop to update your contact information by:
- Click on “Memberships” in the man menu and then “Update Contact Information”

This will help us keep our mailing list up to date so there is little or no lag time in receiving mailings at your new address.
BREAKFAST KEYNOTE: Tom Suddes, The Suddes Group, ForImpact.org
Tom Suddes has made a name for himself as a “thought leader” in the nonprofit arena. A coach, trainer, consultant, speaker, and writer with over 33 years of experience in development, strategic visioning, campaign management, and major gift solicitation, Tom has been labeled contrarian, radical, whacky, crazy, and (what he feels is the highest compliment) “the Tom Peters of the nonprofit world.” Suddes is widely known as a maverick and an agent of change. He began his career in the development office at the University of Notre Dame in 1973. He eventually became the director of development and headed the Campaign for Notre Dame, which raised $180 million ($50 million over the $130 million goal). In 1983, he founded The Suddes Group, which managed over 300 campaigns, raised over $1 billion, and helped generate three million new jobs in their work with 125 economic development organizations around the country. In his current role, he acts as chief visionary officer for The Suddes Group and chief evangelist for the For Impact Movement. As the “voice” of the For Impact community, Tom lives, plays, and coaches at the For Impact Leadership Center just outside Columbus, Ohio.

LUNCHEON KEYNOTE: Penelope Burk, Donor-Centered Fundraising
A senior fundraising professional with more than thirty years’ experience, Penelope Burk is a specialist in fundraising strategic planning, research, and training. She has held management positions in both fundraising and communication in the arts, social services, and sport/recreation charities, and is today one of the most sought after trainers in the sector. Penelope is also an accomplished author and speaker, having written two books and more than fifty seminars, training programs, articles, and plays especially for not-for-profit organizations. Penelope’s comprehensive, leading-edge research on donor relations is the foundation of her innovative work, her advocacy for donors, and her passion for the philanthropic spirit. In 2003, she put this powerful combination of information and passion into print with her second book, Donor-Centered Fundraising, a publication that established her as the industry’s foremost authority on fundraising research, training, and strategic planning based on its principles. Penelope’s presentations are widely acclaimed as unique, engaging, and among the most effective training programs in the fundraising world.
# Fund Raising Day 2006 - Schedule of Training Opportunities

Building a career in fundraising! Who would have thought you could build a career in fundraising? Fourteen years ago, I did not know this was an option. Yet, this is the journey I have taken. I consider my journey in non-profits a genuine adventure, as it has brought depth and humor to my life. I have experienced the lives of children and their families during authentic moments that have touched me deeply. Yet, in the course of my job, I have worked on some “way out there” events and pulled off really kooky ideas!

My work is not always adventuresome. Day to day, it can be full of very simple tasks, but days come along, and I feel stretched! On those days the escapade seems arduous, but when looking back, the quest was in the challenge itself. My career has grown from this crazy journey. I have increased my skills, because there was no one else to do it, or I expanded my knowledge, quickly, because I was in a sticky situation. The hard part about building a career in fundraising, is that it is hard to stop and think about what you are building and why. This conference is an opportunity for you to map out the future with fresh plans.

My hope is that this conference will help equip you with tools to build your organization, your career, and the future of philanthropy. **So, Gear Up!** and get in touch with the passion that started you on this adventure.

Lisa Burbidge, Chair

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<tr>
<th>Time</th>
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<tr>
<td>7:30 - 8:00</td>
<td>REGISTRATION AND CHECK-IN</td>
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<tr>
<td>8:00 - 9:20</td>
<td>BREAKFAST WITH KEYNOTE ADDRESS BY TOM SUDDES, THE SUDDES GROUP, FOR IMPACT</td>
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<td>Stop “Asking for Money,” Start Presenting the Opportunity sponsored by Westminster College</td>
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<td>9:20 - 10:25</td>
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<td>NUTS &amp; BOLTS</td>
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<tr>
<td>9:20 - 10:25</td>
<td>Building Corporate Relationships and Creating Memorable Experiences</td>
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<td>10:25 - 11:55</td>
<td>TRACK TWO</td>
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<td>POWER TOOLS</td>
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<td>10:25 - 11:55</td>
<td>Planned Giving Toolkit</td>
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<td>11:55 - 1:30</td>
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<td>CONSTRUCTIVE IDEAS</td>
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<td>wyoming room</td>
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<td>11:55 - 1:30</td>
<td>AWARDS LUNCHEON WITH KEYNOTE ADDRESS BY PENELOPE BURK, PRESIDENT OF</td>
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<td>CYGNUS APPLIED RESEARCH, INC. AND AUTHOR OF</td>
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<td>DONOR-CENTERED FUNDRAISING</td>
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<td>sponsored by the University of Utah</td>
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<tr>
<td>1:30 - 2:35</td>
<td>Marketing and Communication in a Donor Centered World: Selling Your Impact!</td>
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<td>2:35 - 2:50</td>
<td>BREAK/VISIT WITH THE VENDORS sponsored by Utah State University Foundation</td>
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<td>2:50 - 3:55</td>
<td>PANEL DISCUSSION: Rethinking Philanthropy from a Donor Perspective</td>
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<tr>
<td>3:55 - 5:00</td>
<td>SOCIAL HOUR sponsored by Pathway Associates</td>
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Cultivation is about attracting donors to enter into what would hopefully be long–term relationships. Donor recognition is about developing a personalized approach to keep donors Informed, Interested and Involved so they’ll stay Invested.

“It’s important to remember that everyone in your organization is in development,” Kathryn Brussard began. “And everyone needs to understand how they are part of the donor recognition process. It’s about involving your front desk staff before donors arrive for a visit, and involving your board members in calling donors to thank them in meaningful ways. Are you projecting a donor-centered focus? What is your reputation in the community, and how do you know this?”

Kathryn offers the following questions to explore your organization’s “recognition quotient”:

• Have you handwritten a personal thank you note to a donor in the past week?
• Have you, your executive director and your board president each called donors in the past week to say thank you?
• Do you have a written acknowledgement plan that indicates which donor gets what letter, note, phone call or newsletter, when and from whom?
• Do you review your acknowledgment letters every six months? Annually?
• Do you have special acknowledgments for first time donors, reactivated lapsed donors, increased gifts, gifts of certain sizes and gifts with matching gift forms?
• Do you always put the amount in the letter?

If you would like immediate feedback on how you could improve donor recognition and stewardship, Kathryn suggests you make some personal phone calls to key donors to ask for their input. The better you understand what matters most to them, and how they like to keep informed, stay involved and be recognized by your organization, the more meaningful and rewarding your relationships will be.

In The News:

How To Find Your Angel!

In the March 2006, BUSINESS 2.0, Michael Copeland writes about matching funding with ideas for a world-changing idea, a prototype or an industry-changing idea. His steps for finding an “angel” investor, are good suggestions for the non-profit world. As you search for new funding, consider the following:

1. Look for angels close to home. Friends, colleagues, family. Who knows your organization best?
2. Woo angels with good deeds. Demonstrate why you are worthy of funding.
3. Recruit an archangel. It is important to have someone to represent you, to be a champion for your cause.
4. Learn each angel’s favorite harp. Angels prefer to invest in specific kinds of organizations.
5. Let the angels play along. They want to make a difference. Ask them to sit on an advisory council.

With thanks to Michael Copeland at Business 2.0.
Highlights from the USFR Professionalism Series Workshop

Stewardship: Taking Care of Your Donors
by Jeff Driggs, USFR Vice President for Professionalism

USFR members who attended Kathryn Brussard’s workshop on Stewardship prior to her lunch address got an extra opportunity to benefit from this professional’s years of experience in fund raising. As a trained actress, Brussard knows many tricks of getting people up and out of their seats to act out case studies that drive home important points about treating donors right.

Responsible Stewardship, she taught, means:
• Keeping positive relationships with donors
• Maintaining accountability
• Providing appropriate recognition
• Remaining true to your organization’s mission

Don’t get so caught up in your pre-planned speech or presentation that you don’t take the time to learn from your prospects. Relax. Listen to them. Notice things about them. Remember that the donor is the most important person. (And remember to record the things you’ve learned by watching and listening. “Your database is gold,” Brussard said. Everything should be recorded in it that’s relevant to this or future interactions.)

Brussard reviewed the types of donors we deal with, from the “Suspects” who we may not even know why they’re on our database to the “Advocate Donors,” who not only give, but who volunteer and who actively promote our organization to others. We need to develop different strategies of stewarding all these types of donors—first-time [or “trial”] donors, repeat donors, client donors, etc.—a strategy that is appropriate to the particular audience segment. (You might want to consider starting a new donor welcome program, for first-time donors.) And in all of this, we have to keep in mind the two factors that will build donor loyalty: satisfaction with the way we respond to their gift, and satisfaction with our organization overall.

“You can never say thank you too many times.” Plan thank you calls for gifts over a certain amount—to be made even before the acknowledgment letter goes out. Send acknowledgment letters to ALL donors, not just the big ones, and send them out PROMPTLY! Make each letter unique, and get their names and salutations right. Remember milestones in their lives, and send them a personal note when they occur.

“The only thing we have is our reputation,” taught Brussard. We need to do the best we can to maintain that reputation through positive interactions with them. The bottom line: Be Personal!

On the Move

Dr. Rob Behunin has been named executive director for advancement for the Utah State University, Uintah Basin campus. Prior to this he was associate director of extension for Utah State University in the Uintah Basin. Rob has distinguished himself as a teacher, scholar and administrator in higher education receiving both the Teacher of the Year Award and Outstanding Educator at Southern Utah University. He graduated from Southern Utah University then received his M.A. and Ph.D. in medieval and renaissance English literature at University of Nevada, Las Vegas. Rob has prior fundraising experience with higher education, private charities and foundations.

Lisa Burbidge joined Ronald McDonald House Charities in November 2005. Lisa previously worked at The Madeleine Choir School, Boys & Girls Clubs of Greater Salt Lake and began her career as a loaned executive for United Way. Lisa served as a volunteer and board member for the Junior League of Salt Lake and is serving as the chair for USFR Fund Raising Day 2006.
Membership News

USFR Membership – We Want to Hear From You!
The USFR board and staff are delighted to have more than 400 hundred local professionals as current members of USFR. We’re working to clean up our mailing list at USFR, so please let us know if you are not receiving regular newsletters and event notices, or if your organization is receiving USFR mail for someone who is no longer there! USFR membership is individual rather than organizational—we hope to be a resource and asset to you as a professional in the development field. We need your ideas and feedback on our trainings, luncheons, newsletters, website (www.usfr.org) and directory so that we can continue to strengthen the USFR offerings and member benefits. The new USFR membership directories were mailed to all current members in January. Please let us know if you did not receive a new directory and we’ll get one out to you. Please contact Amberlie at 355-1929 or via email at membership@usfr.org with questions or feedback about your membership, because we want to hear from YOU!

Carrie Romano
VP, Membership