

## Welcome to the AFP Northwest Ohio Chapter!

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We are a community of individuals dedicated to the development and growth of our profession and of ourselves as professionals ... and to upholding the highest ethical standards while doing so. We invite you to join us!

With the exception of June, July, and November, we meet monthly for lunch to network and learn from experts in the field and each other. Unless noted otherwise, our meetings are held at the Toledo Club (235 14<sup>th</sup> Street, Toledo, OH 43604) from 11:30 am - 1:00 pm on the fourth Wednesday of every month. Lunch is served, and we ask that you register online. The member fee is \$18, and you can pay by credit card when you register. We also offer FREE monthly webinars, courtesy of our partnership with the Toledo Community Foundation.

Make sure you receive email reminders to register for our programs: [click here](#) to register for our eblast listserv.

Many other benefits and resources come with membership in AFPNWO. These can be found on our website: [www.afpnwo.org](http://www.afpnwo.org). Don't know where to start? Begin with this Welcome Packet, which has everything you need to jump-start your professional development in AFP!

We encourage you to explore our entire website, paying special attention to these pages:

- ★ Our [calendar of events](#) is on our home page with special “add to my Outlook calendar” links so you can make sure you never miss a meeting!
- ★ The National Philanthropy Day (NPD) Award Luncheon—scheduled for Wednesday, November 14, 2018—is an opportunity to be inspired by the many dedicated philanthropists and fundraisers in our community that will be honored that day. If you would like to nominate a community leader for an award, more information can be found on our [NPD page](#).
- ★ Get the most out of your membership by joining a committee that interests you. Click here for a [list of committees](#) that are looking for people to get involved. Be sure to contact the chairs if you have any questions or are interested in joining.
- ★ The Mentoring Program offered by the AFP Northwest Ohio Chapter is a member-only benefit that provides individualized guidance and support to advance the skills of those newer to the profession, transitioning to a new area of the field or looking for opportunities to grow in their fundraising career. For both mentors and mentees, this is an exceptional opportunity to share expertise, network with and learn from colleagues, and, ultimately, ensure the strength of Northwest Ohio’s philanthropic community. The program will be accepting applications in the fall. [Click here](#) for more information, including the mentee and mentor applications.
- ★ It can be hard to stay motivated, refreshed, and ready for that next big meeting with that new major donor. That's why our members say that networking is the number one reason to join AFPNWO ([click here](#) for a list of their names, titles and organizations so you can see the wide diversity of our membership). We believe that the member directory is one of the best benefits

of membership. It has the contact information of all of our members. Our members are happy to network with you and to help you grow as a professional. Once you join, you will receive an email with the password to the directory.

- ★ CFRE certification serves as an impartial, third-party endorsement of your knowledge and experience of international standards in philanthropy. It adds to your credibility as a fundraiser and sets you apart from other professionals as a veritable steward of the public trust. Every one of our programs is approved for CFRE credit. [Click here](#) for more information on the CFRE program and for our tracking documentation for 2017 and 2018 programs.
- ★ The [AFP International Conference](#) will be held in 2019 in San Antonio, TX. The AFPNOWO Chapter offers the Chamberlain Scholarship to one member, and it covers the cost of the registration to the conference (less a minimal \$10 fee) and \$500 in travel expenses. The application deadline for this scholarship is in October. Look for our announcements in the fall!

The rest of this packet contains more extensive information about AFP benefits, including frequently asked questions, why your organization should support your membership, the AFP ethical standards, the donor bill of rights, and more. Please review it at your leisure.

Please contact us with any questions! We look forward to welcoming you at your first meeting.

Best wishes,



Shelly Orenstein ([sorenstein@istscience.org](mailto:sorenstein@istscience.org)) & Elizabeth Emmert ([eemmert@sbcglobal.net](mailto:eemmert@sbcglobal.net)),  
Membership Co-Chairs

## BE the CAUSE

Our chapter takes pride in the fact that 100% of our board has made a gift to the BE the CAUSE Campaign. Passion, purpose and pride not only drive what we do, but why we do it. All of the members of the board invite you to join them by making a gift to the BE the CAUSE Campaign.

As a fundraiser, you know the importance of your base financially supporting the mission of your nonprofit. The same is true for both our chapter and the AFP Foundation. Your gift to the BE the CAUSE campaign is an investment in yourself, in fundraisers both today and in the future, and in the development of our profession.

### Why Give?

- ★ This year we have a chance to get more of the money raised coming back to our chapter. Our chapter can get 35% of all funds raised up to \$1,500 and 100% of all funds raised over \$1,500.
- ★ This money will be used for membership retention and recruitment, which will include maintaining and providing additional benefits for you - our members.
- ★ As a donor to our chapter, you are supporting causes that you value that can transform our society and make you more effective and efficient in your career - ethical and effective fundraising, education, training, formal and informal mentoring, and networking.

### Two Ways to Give

- ★ [Click here to donate by credit card online.](#)

To make sure our chapter gets the contribution, either log in at the top:

AFP Foundation for Philanthropy - Donate Now

Log in with AFP Username and Password (Preferred)\*

or select [2018 BE the CAUSE](#) in the campaigns drop-down and then select AFP OH, Northwest Chapter under Chapter designation toward the bottom of the screen:

Chapter Designation

AFP OH, Northwest Chapter ▼

- ★ [Complete the BE the CAUSE pledge form](#): Use this form to donate by check or if you wish to pay in easy payment installments. You can ask for payments to be made from your credit card automatically or ask to be reminded to pay your pledge on specific months.

### Thank you for your support!

Questions? Contact Campaign Chair, Sandra Migani Wall, PhD, or Jacquie, AFPNOWO Chapter Administrator, at [info@afpnwo.org](mailto:info@afpnwo.org) (330-329-2472).

## Frequently Asked Questions about Joining AFP

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### Does my membership belong to me, or to the organization I work for?

It depends on the type of membership that you join. If you are a Professional, Young Professional, Global eMember, Collegiate or Associate member, the membership is yours and goes with you if you leave an organization. The Nonprofit Organizational Membership for both large and small organizations belongs to the organization or company. If an employee leaves, the organization may replace the name of the designated member. New members still need to fill out a membership application and sign their adherence to the AFP Code of Ethical Principles and Standards.

### Does my membership stay with me if I switch organizations?

If you are in one of the individual membership categories, the membership goes with you when you switch organizations. If your membership is part of a small/large nonprofit organization membership, then it stays with the organization. In that case, the organization should contact the Chapter Administrator to update the membership contact information.

### What if I am retiring?

If you have been an AFP member for the past 5 years, check your membership renewal invoice and indicate the change to the Retired Member category. If you prefer, you can call AFP membership services at 800-666-3863.

### Can I join just the local Chapter?

AFPI does not permit this. When a member joins AFP, he or she joins both the international organization and a local chapter. Thus, a member pays both the annual and local dues to the International Headquarters, which then reimburses your local dues to the local chapter.

### How much are annual dues?

Your membership dues depend on the type of membership applicable to you. Members must self-assess to determine the type of membership for which they are eligible. Prospective members should self-determine the category of membership, and renewing members should review and reassess membership categories. [Click here](#) for descriptions of the categories available to you. From the dues you send to AFPI, the AFP Northwest Ohio Chapter will receive \$25-\$40, depending on the membership level you choose.

### What if I want to be a member of two different chapters?

That's very easy to do. Simply call AFP International at 800-666-3863 and tell them which chapters you want to join. You will need to pay for one AFP membership plus the chapter dues for both chapters (the AFPNOWO chapter dues are \$40).

### How long does my membership last?

Your membership lasts 12 months, starting in the month you officially become a member.

*Do you have further questions? Email them to [info@afpnwo.org](mailto:info@afpnwo.org).*

## TOP TEN REASONS FOR YOU TO JOIN THE ASSOCIATION OF FUNDRAISING PROFESSIONALS

1. **Proclaim your professionalism.** Adding your name to the ranks of over 30,000 fundraising professionals declares your pride in the profession you have chosen.
2. **Advertise your integrity.** AFP has a reputation for upholding high standards. Since every AFP member signs his/her adherence to the Code of Ethical Principles and the Standards of Professional Practice every year, you align yourself with like-minded practitioners of ethical fundraising.
3. **Advance your career.** AFP members enjoy educational opportunities designed to increase knowledge and keep up with the newest trends in fundraising, both on the international and local levels. Our chapter offers six professional development breakfast programs with various speakers.
4. **Further your cause.** The more that you learn about the latest methods in fundraising, the better equipped you are to further the cause of the organization you represent.
5. **Network with others who do what you do.** Making connections is an important part of fundraising for the cause you represent. Meet others who can help you make those connections at events such as the International Conference on Fundraising and locally at the Career Success Institute, Member Orientation program, and Professional Development breakfast programs.
6. **Advocate for your profession.** Serious-minded professionals know that serving the profession means responding to calls for action from those who represent the profession. AFP has an active program that monitors trends in education, regulation, and practice standards and periodically advises members on required action.
7. **Serve your profession.** Opportunities abound for individuals to serve on local committees such as National Philanthropy Day, Professional Development Committee, Diversity and others listed on our website. Local and International committees work on a variety of issues - from building the core body of fundraising knowledge to building the public trust in the philanthropic process.
8. **Don't reinvent the wheel...use available resources.** AFP's Resource Center can provide you with the resources you need to do your job well. AFP staff can assist you in many areas ranging from how-to materials to samples of materials developed by other fundraising professionals that will fit your needs.
9. **Play a part in elevating the status of the fundraising profession.** Your membership in AFP and your dedication to the ethical principles that guide the fundraising process elevates the entire profession. You can also become a mentor with our local chapter.
10. **Do it for YOURSELF!** It's all about YOU, the fundraising professional. AFP's educational, networking, and career planning programs will take you where you want to go!

## THE CASE FOR YOUR ORGANIZATION TO SUPPORT AFP MEMBERSHIP

### **Advertise your organization's reputation for integrity**

Your organization and your employees' affiliation with AFP signals to volunteers, staff, donors and the general public that your organization adheres to the highest professional standards and builds trust in the work you do as an organization. AFP members annually reaffirm their commitment and adherence to both the AFP Code of Ethical Principles and Standards of Professional Practice and A Donor Bill of Rights, which every member promotes as part of their membership commitment. In addition, AFP members have a professional team of experts on ethics at their command at all times.

### **Advance your organization's mission**

Education and training bring you and your staff the latest in fundraising innovations, keep you apprised of trends in the philanthropic sector, and will help you to adjust your operations to use resources in the most efficient and productive manner possible. Membership in AFP will help your development team to effectively integrate the fundraising process throughout your organization and engage both staff and board members in the process of raising funds to advance your mission. Connections made at both the local and international level help raise the visibility of your organization by communicating your mission to the nonprofit community.

### **Succeed in an increasingly competitive environment**

Put the collective knowledge and experience of the world's largest association of fundraising professionals to work for you and your organization. Whether you are looking for statistics on giving, revising your gift acceptance policy, or wish to revise job descriptions for development staff, the AFP Resource Center is available to members at no charge.

### **Invest in your professional staff with cutting-edge training and education**

Retaining valuable staff members by investing in their professional development will pay big dividends! Staff members build confidence in their skills and make valuable contacts with other professionals...in turn; your support for their professional efforts will build loyalty to the organization and enhance performance.

### **Recruit from an international database of development professionals**

When recruiting for new development staff, use the Online Job Service hosted on AFP's website to gain instant access to fundraising professionals around the world and in your local community. By hiring an AFP member, you are assured that they are adhering to the AFP Code of Ethical Principles and Standards of Professional Practice and promoting A Donor Bill of Rights.

### **Partner with other nonprofit executives to advocate for the nonprofit sector**

AFP represents the profession in matters relating to fundraising, tax incentives for giving, privacy issues and other charitable initiatives. AFP not only keeps you advised about pending regulations and legislation but acts on the profession's behalf when advising and lobbying legislators on behalf of fundraisers in all areas of the profession--from healthcare and education, to the arts and social benefit agencies.

### **Advance philanthropy through public outreach**

A priority of the AFP strategic plan is to strengthen the profession through public outreach to increase understanding of the positive economic impact of the sector and fundraising profession, as well as to increase public trust in fundraising. Events such as National Philanthropy Day®, a community-wide celebration of philanthropy, enable your organization to show appreciation to your donors and volunteers in a public forum. Add your organization's voice to this important initiative.

## Become a CFRE or ACFRE

CFRE certification serves as an impartial, third-party endorsement of your knowledge and experience of international standards in philanthropy. It adds to your credibility as a fundraiser and sets you apart from other professionals as a veritable steward of the public trust.

The CFRE certification process consists of three parts: a written application, a written examination, and an agreement to uphold a code of ethics and Accountability Standards. Individuals who wish to maintain their CFRE certification must recertify every three years.



### About the CFRE Exam

The Certified Fund Raising Executive (CFRE) Examination is designed as a generalist exam for fundraising professionals to demonstrate mastery of the [six core knowledge areas](#) related to fundraising practice: Current and Prospective Donor Research; Securing the Gift; Relationship Building; Volunteer Involvement; Management; and Accountability. The computer-based examination consists of 200 multiple choice questions. Of those, 175 questions count toward your score. The other 25 questions are questions that are being tested to make sure they are psychometrically sound. [more](#)

All AFPNOWO programs are approved for CFRE credits. [Click here](#) for documentation.

### ACFRE Certification

The ACFRE credential demonstrates not only ethical and effective professional practice - it demonstrates a wholeness, a universality in your career. As an applicant, you must demonstrate basic eligibility to begin the process, but the overall application communicates much more than eligibility. A significant portion of the application covers continuing education in advanced leadership, management and ethics, which is your opportunity to highlight your depth and breadth of knowledge and general curiosity about our sector.

The entire ACFRE program must be completed within two (2) years of the date that the ACFRE Certification Board accepts an application. A candidate may request one one-year extension to his/her calendar at any time during the process. Upon completion of the four sequential components outlined below, the ACFRE Certification Board confers upon candidates the designation of Advanced Certified Fundraising Executive (ACFRE).

The AFPNOWO Chapter has more ACFRE-credentialed professionals than any other Chapter in the country. Attend a meeting and meet our leaders in the profession!

[Click here for more information about the ACFRE certification.](#)

## The AFP Donor Bill of Rights

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[Source](#)

Philanthropy is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

- I. To be informed of the organization's mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.
- II. To be informed of the identity of those serving on the organization's governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.
- III. To have access to the organization's most recent financial statements.
- IV. To be assured their gifts will be used for the purposes for which they were given.
- V. To receive appropriate acknowledgement and recognition.
- VI. To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law.
- VII. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
- VIII. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.
- IX. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
- X. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.



## AFP CODE OF ETHICAL STANDARDS

(Adopted 1964; amended October 2014)

[Source](#)

The Association of Fundraising Professionals believes that ethical behavior fosters the development and growth of fundraising professionals and the fundraising profession and enhances philanthropy and volunteerism. AFP members recognize their responsibility to ethically generate or support ethical generation of philanthropic support. Violation of the standards may subject the member to disciplinary sanctions as provided in the AFP Ethics Enforcement Procedures. AFP members, both individual and business, agree to abide (and to ensure, to the best of their ability, that all members of their staff abide) by the AFP standards.

### Public Trust, Transparency & Conflicts of Interest

Members shall:

1. not engage in activities that harm the members' organizations, clients or profession or knowingly bring the profession into disrepute.
2. not engage in activities that conflict with their fiduciary, ethical and legal obligations to their organizations, clients or profession.
3. effectively disclose all potential and actual conflicts of interest; such disclosure does not preclude or imply ethical impropriety.
4. not exploit any relationship with a donor, prospect, volunteer, client or employee for the benefit of the members or the members' organizations.
5. comply with all applicable local, state, provincial and federal civil and criminal laws.
6. recognize their individual boundaries of professional competence.
7. present and supply products and/or services honestly and without misrepresentation.
8. establish the nature and purpose of any contractual relationship at the outset and be responsive and available to parties before, during and after any sale of materials and/or services.
9. never knowingly infringe the intellectual property rights of other parties.
10. protect the confidentiality of all privileged information relating to the provider/client relationships.
11. never disparage competitors untruthfully.

## **Solicitation and Stewardship of Philanthropic Funds**

Members shall:

12. ensure that all solicitation and communication materials are accurate and correctly reflect their organizations' mission and use of solicited funds.
13. ensure that donors receive informed, accurate and ethical advice about the value and tax implications of contributions.
14. ensure that contributions are used in accordance with donors' intentions.
15. ensure proper stewardship of all revenue sources, including timely reports on the use and management of such funds.
16. obtain explicit consent by donors before altering the conditions of financial transactions.

## **Treatment of Confidential & Proprietary Information**

Members shall:

17. not disclose privileged or confidential information to unauthorized parties.
18. adhere to the principle that all donor and prospect information created by, or on behalf of, an organization or a client is the property of that organization or client.
19. give donors and clients the opportunity to have their names removed from lists that are sold to, rented to or exchanged with other organizations.
20. when stating fundraising results, use accurate and consistent accounting methods that conform to the appropriate guidelines adopted by the appropriate authority.

## **Compensation, Bonuses & Finder's Fees**

Members shall:

21. not accept compensation or enter into a contract that is based on a percentage of contributions; nor shall members accept finder's fees or contingent fees.
22. be permitted to accept performance-based compensation, such as bonuses, only if such bonuses are in accord with prevailing practices within the members' own organizations and are not based on a percentage of contributions.
23. neither offer nor accept payments or special considerations for the purpose of influencing the selection of products or services.
24. not pay finder's fees, commissions or percentage compensation based on contributions.
25. meet the legal requirements for the disbursement of funds if they receive funds on behalf of a donor or client.