

# WHAT'S YOUR NEXT MOVE?

## Professional Growth & Success in the Fundraising Game



**Four Thursday Online Sessions — 11:00 a.m. to 12:00 noon**  
**May 6 • May 13 • May 20 • May 27**

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# The 2021 AFPGV Regional Conference

## GET IN THE GAME!

Dear Friends:

Thank you for joining us for the AFPGV's online Regional Conference - **WHAT'S YOUR NEXT MOVE? Professional Growth & Success in the Fundraising Game**. In the past year, we've become experts at attending meetings and educational sessions on Zoom and other online platforms. We look forward to learning and networking with you in a way that's become matter-of-fact in our work lives.

Our keynote speakers, headlining weeks one and three are Dr. Amir Pasic and Dr. Janice Gow Pettey. They are international thought leaders in professional development and career pathways. Panel discussions in weeks two and four bring local leaders to these meaningful topics. And you are part of the formula, by asking questions and reacting in the chat feature of Zoom webinar. Take some time to browse through these pages and learn more about the upcoming sessions.

A special thanks to all of our presenters and session facilitators. I'd also like to recognize the hard work and dedication of our conference committee (see page 26). And last but certainly not least, our sincere thanks to our generous sponsors including Manning & Napier, Rochester Regional Health Foundations, Causewave Community Partners, Greater Giving, The Community Foundation, Tim Thomas & Associates, the University of Rochester, Hillside, Alliance Advisory Group and Benezet Advisors, who all believe in the work we do as fundraisers and the importance of philanthropy in our communities.

What will the philanthropic and fundraising communities be like next year, ten years from now, and in the following decades? No one presenting at this conference peers into a crystal ball, but by sharing their knowledge and experiences, you may have a better idea of where we've been, and where we're going! We are functioning in a world that will not return to the "old normal," but as a community, the challenges brightly illuminated by COVID-19, health risks, economic instability, and racial inequity, provide work for a better future. We hope that this virtual conference offers you the very best in professional development and educational innovation, and new ways to connect with our sponsors and supporters.

Thank you for your support of AFPGV. Stay healthy and well!

Best,

*Jillian Carter*

Jillian Carter  
President, AFPGV Chapter  
Director of Advancement, Heritage Christian Services

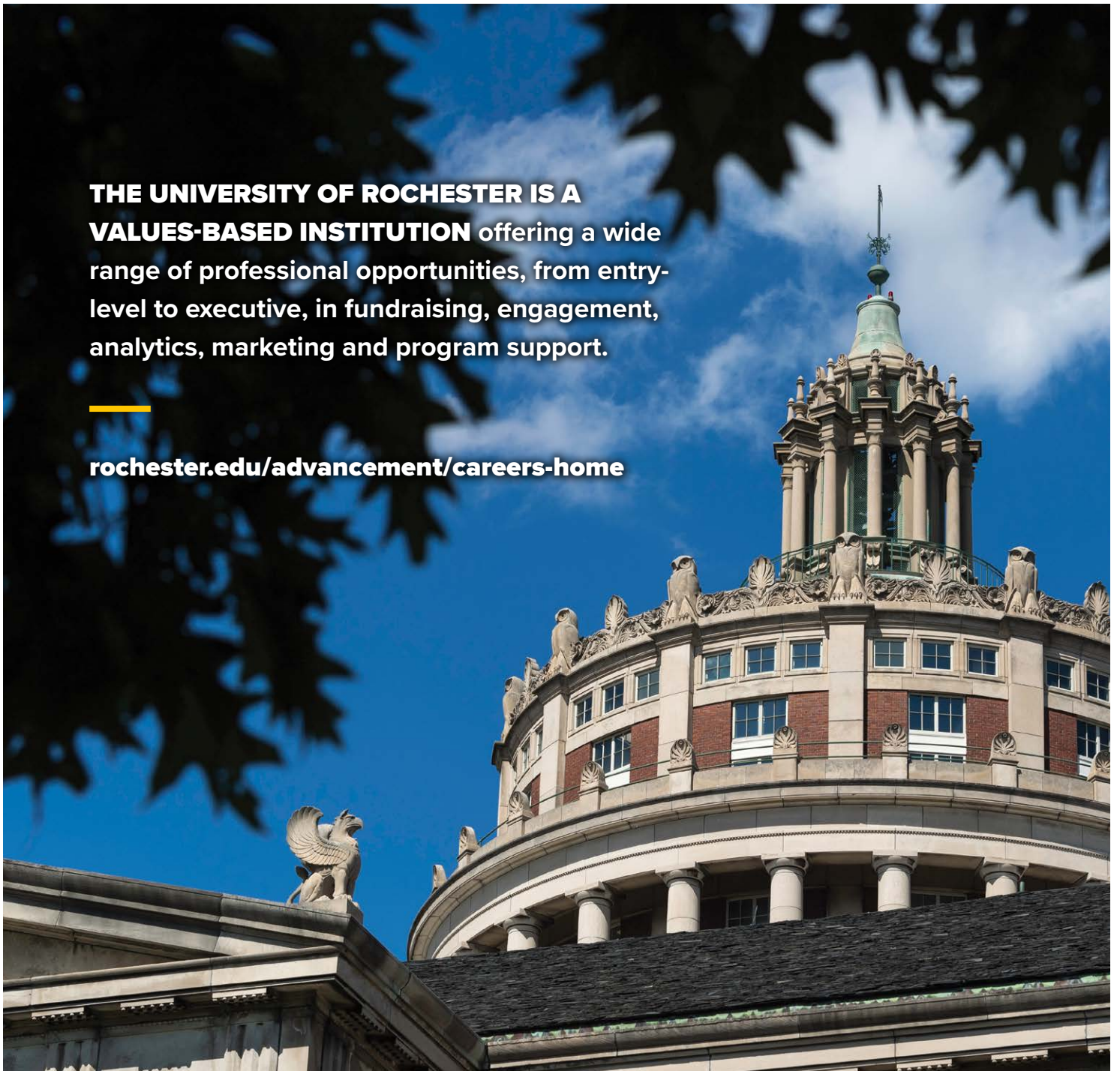
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# SESSIONS & PRESENTERS

## May 6 — Session One: Keynote Address



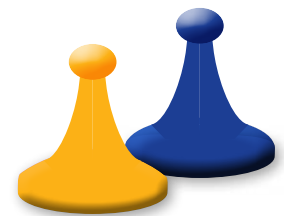
Dr. Amir Pasic



Mike Geiger

After a special welcome and conference kick off from Mike Geiger, President and CEO of AFP Global, we are pleased to be joined by Dr. Amir Pasic, the Eugene R. Tempel Dean of the Indiana University Lilly Family School of Philanthropy. Dr. Pasic will introduce our conference theme of professional pathways. The Lilly School is the world's first school devoted to research and teaching about philanthropy. He brings us the field's finest in scholarship and practice.

Prior to joining Lilly, Pasic held posts at the Council for Advancement and Support of Education (CASE), Johns Hopkins University, the Rockefeller Brothers Fund, and The George Washington University. He's been a librarian at the Library of Congress and on the faculty at Brown University. His own varied and interesting career pathway will certainly help to inform and enlighten conference attendees.



## May 13 — Session Two: Mentor, Manager, Learner, Leader

Join some of Rochester's most experienced fundraising managers as they explore leadership roles and opportunities, ensuring fundraising staff and organizations grow in skills, accomplishments and understanding. We will learn about ways successful managers create good pathways for employees to flourish. If you've been a fundraiser for decades, you're just starting out, or at any point between, the panel discussion is designed to speak to you.

Panelists:

- Craig Evans, Vice President for Development, Foundations, Rochester Regional Health
- Kelly Gagan, CFRE, Associate Vice President for University Advancement at the University of Rochester
- Steven Smith, CFRE, Vice President & Chief Development Officer, Foundation at St. Ann's Community

Facilitator: Stephanie Reh, Founder & CEO, Accountability Evangelist



Craig Evans



Kelly Gagan, CFRE



Steven Smith, CFRE



Stephanie Reh

# SESSIONS & PRESENTERS (CONTINUED)

## May 20 — Session Three: AFP 2050



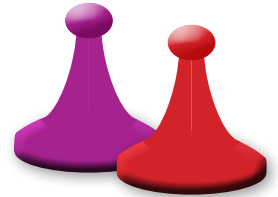
Janice Gow Pettey



Diana Palotas

To understand the fundraising community, donors and philosophies of the future, Diana Palotas, Director of Advancement at Trinity Montessori School, joins Janice Gow Pettey in conversation to explore our current landscape. How do multi-cultural, multi-racial teams add value? Are we mission driven, community driven or donor driven? Or all three? How best can we embrace change? For the answers to some of these questions, and the chance to consider your questions, join this important and timely conversation.

Dr. Pettey is a nonprofit executive, an author, a teacher, and noted authority on diversity, ethics, and nonprofit governance. Janice is chair emeritus of both the AFP Ethics Committee and the AFP Research Council. During her nonprofit career she has served as both CEO and led the development efforts of diverse organizations including The Asia Foundation, Sacramento Region Community Foundation, American Red Cross Bay Area, and United Way of the Bay Area.



## May 27 — Session Four: How Did I Get Here? How Do We Get There?

Our final session features a panel discussion of distinguished fundraisers reflecting on personal pathways in their careers, and the benefits of continuity and transition in their organizations... and yours!

### Panelists:

- Bonnie Butkas, Executive Director, Merrimack Repertory Theatre
- Bryan Hensel, Executive Director, NTID Office of External Affairs, Rochester Institute of Technology
- Shaunta Rankin, Director of Human Resources, Empowering People's Independence (formerly Epilepsy-Pralid)

Facilitator: Cassandra George Ramos, President, Wind and Water Consulting



Bonnie Butkas



Bryan Hensel



Shaunta Rankin



Cassandra George Ramos



# *Stranger Together*

AFP members are tireless advocates for nonprofit causes throughout our region, and Rochester Area Community Foundation is proud to be your partner in philanthropy.

Together, we are creating an equitable community and strengthening our region's vitality.



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# PANELIST & FACILITATOR BIOS

## Session Two

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***Craig S. Evans, Ed.D., Vice President for Development, Foundations, Rochester Regional Health***

Mr. Evans' extensive career includes major gift fundraising, planned giving, and leadership positions as Chief Development Officer. He also serves as a team building and leadership development coach, and has a passion for building high-performing teams.

***Kelly Gagan, CFRE, Associate Vice President for University Advancement, University of Rochester***

With a decades-long career in major gifts, campaign planning and execution, alumni relations, marketing, and institutional leadership, Ms. Gagan now heads advancement initiatives for one of the country's leading research universities.

***Steve Smith, CFRE, Vice President and Chief Development Officer, St. Ann's Community***

Having held the chief fundraising position for both St. Ann's and Hillside, Mr. Smith is one of the most recognized advancement leaders in Rochester, and has also served as an AFP-GV board member and volunteer for many years.

***Facilitator: Stephanie Reh, Founder and CEO, The Accountability Evangelist***

After leading development and operations departments in for-profit and not-for-profit organizations, Ms. Reh is now coaching individuals and organizations through group and private coaching. Individuals are coached for personal transformation and organizations are coached for corporate cultural transformation, leadership development, growth cultures, all based on accountability.

## Session Four

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***Bonnie Butkas, Executive Director, Merrimack Repertory Theatre, Lowell, MA***

As co-leader of MRT, Ms. Butkas heads the business side of the organization, overseeing marketing, development, finance, and patron services. She collaborates with MRT's Artistic Director, community organizations, staff leaders, volunteers, and MRT's Board of Trustees to engage the community, grow the organization, and secure MRT's future.

***Bryan Hensel, Executive Director, NTID Office of External Affairs at Rochester Institute of Technology***

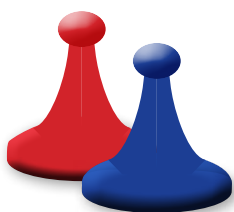
With more than 15 years of experience in fundraising and alumni relations, Mr. Hensel now heads the office overseeing advancement and performing and visual arts programs for this unique, world-leading college for deaf and hard of hearing students.

***Shaunta Collier-Rankin, Director, Human Resources, Empowering People's Independence***

Ms. Collier-Rankin's extensive non-profit leadership career includes several positions directing fundraising and campaigns. As a member of the leadership team of EPI, she engages with the organization's staff and leaders to build enthusiasm for the organization's mission and drive support.

***Facilitator: Cassandra George Ramos, President, Wind and Water Consulting***

Celebrating 23 years in the development profession, Ms. George Ramos's experience extends through three Planned Parenthood affiliates, campaign consulting with Andrea Kihlstedt, leadership in several community-based nonprofits, and eight years in higher education including work as a major gifts officer at three area institutions.





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### **Alison L. Finstad, Founder and Principal**

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We have one mission: to advance yours. Benezet Advisors helps small nonprofits achieve fundraising success and sustainability to advance their missions. We work with all types of nonprofits: human services, international relief, faith-based, educational, arts and culture, environmental, and more. Contact us today to boost your fundraising program right away.

*Advancing Your Mission is Our Passion.*



HOW CHANGE GETS GOING

Our goal is to help nonprofits succeed in meeting their missions. Whether your need is strategic, operational or marketing-related, we're here to help you increase your impact. We partner with organizations on a diverse range of projects including fundraising planning, managing organizational change, marketing, mission and vision development, and research to understand key stakeholder perceptions. Schedule a free coffee and consult at [causewave.org](http://causewave.org).



The Rochester Area Community Foundation, in partnership with generous donors and community partners, works to strengthen the eight-county region through philanthropy. Its leadership activities and strategic grantmaking are focused on equity (education, poverty, racial understanding) and vitality (arts, aging, historical preservation), which support positive, enduring community change.



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Whatever cause is your passion—Greater Giving helps you to be more effective in your fundraising efforts. Our technology and credit card processing solutions are designed exclusively for nonprofits—enabling them to raise more funds with online registration, bidding and donations, event management software, payment processing, peer-to-peer fundraising and more.



Hillside Family of Agencies provides comprehensive health, education, and human services for children and families whose challenges threaten their ability to realize their full potential. We are guided by a deeply held belief that healthy children and strong families are the foundation of a thriving community. For over 180 years Hillside has put this belief into practice... delivering the right care, in the right setting, to ensure success — whether in residential treatment, schools, homes or the workplace. Every year more than 13,000 youth, adults and families benefit from over 100 coordinated programs that provide comprehensive, cradle-to-career services.



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### ROCHESTER REGIONAL HEALTH Foundations

With the 2014 merger of the Rochester General and Unity Health Foundations into one entity, Rochester Regional Health Foundation now includes three other foundations: Clifton Springs Hospital Foundation, Newark-Wayne Community Hospital Foundation and United Memorial Medical Center Foundation. As a unified organization, our Foundations Office helps make high-quality healthcare available and accessible to everyone in the communities we serve.



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For over 30 years, Tim Thomas & Associates has worked solely with nonprofit organizations, both nationally and right here in Rochester, to propel their direct response marketing to higher levels. From concept, to copywriting, to list acquisition, and much more, we are uniquely positioned to help you achieve your goals. Email or call Tim Thomas at [ttamktg@cs.com](mailto:ttamktg@cs.com) or 585-265-1565 and let us share some success stories with you!



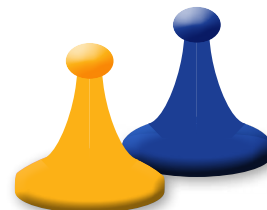
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Founded in 1850, the University of Rochester is one of the country's top-tier, private research universities. As part of a mission to *Learn, Discover, Heal, Create—and make the world ever better*, Rochester offers a cluster-based curriculum that presents unique opportunities for interdisciplinary study and close collaboration with faculty members. The University's health research, teaching, care, and outreach within the community takes place at the University of Rochester Medical Center.



The AFP Genesee Valley Chapter is a volunteer-based organization representing more than 225 fundraising professionals in the Greater Rochester region, and is affiliated with an international association. Members represent schools, hospitals and health care facilities; social service, arts and cultural agencies; and other local charities. Our mission is to promote ethical and successful development by offering programs designed to benefit those who lead, serve, and support non-profit organizations. See page 9 to learn about the many benefits of membership!

**Thank you to  
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# Making a difference?

**We're with you.**

As a nonprofit for nonprofits, our mission is to help you meet yours. Whether you're a grassroots organization, large nonprofit, or community-wide coalition, we're in this with you, because our community needs you.

Causewave tackles systems change, organizational transformation, process building, fundraising, and marketing. So whatever your challenge, we can help you find the best path forward.



HOW CHANGE GETS GOING™

Causewave is always available for a **FREE**, one-hour conversation to provide some quick wins and advice.

Visit **[www.causewave.org](http://www.causewave.org)** or call **585.442.0200 ext. 214** to schedule.

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Since Hillside was founded in 1837, many things have changed—but not the painful multigenerational effects of poverty, trauma and neglect on children, families and whole communities. Hillside is dedicated to breaking that cycle through innovative programs that serve thousands of youth and families annually, and strengthen individual lives every day.

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**Philanthropy makes our work possible.** With support from individuals, corporations and foundations, Hillside can help build stronger futures for those in need.

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# The BENEFITS of MEMBERSHIP in AFPGV

## Membership in a National Organization

When you join the Genesee Valley Chapter, you become a member of the Association of Fundraising Professionals, the standard bearer for professionalism in fundraising for more than 40 years.

## Networking

We have four formal networking groups: Young Professionals, Small Shops, Raiser's Edge Users' Group and Seasoned Advancement Professionals. In addition to informal member meet-and-greets, you can take advantage of unlimited opportunities to meet and work with fellow fundraisers, develop mutually beneficial relationships, learn the ins and outs of the business, and gain invaluable benchmarking information about your market.

## Educational Opportunities

- Breakfast and Luncheon Programs
- Annual Regional Conference
- The AFP International Conference on Fundraising
- Fundamentals of Fundraising
- Deep Dives into fundraising-related topics

## Job Posting Service

Non-profit organizations post fundraising (and related) positions that are often not advertised in other employment venues. Members receive timely notices on job openings.

## Professional Credentials

Advance your career by becoming a Certified Fund Raising Executive (CFRE). The CFRE Professional Certification Program offers fundraising professionals with 3 or more years of experience an opportunity to earn recognition for their experience and professionalism. The CFRE Refresher Course is available, and many of our programs carry CFRE credit.

## A Variety of Membership Options

Whether you join as an individual, a small shop, or a large organization, there are membership levels to fit your needs.

- Professional
- Young Professional
- Associate
- Retired
- Large Nonprofit Organization
- Small Nonprofit Organization
- Business Membership

## To learn more or become a member

Visit [www.AFPGV.org/join-afp](http://www.AFPGV.org/join-afp) or call (585) 586-7810.

## Top Ten Reasons to join!

### 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 Standards 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.

### 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.

### 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 international and local committees that 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 Tools & Resources Tab 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.

### 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!



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[DEMENTIA.STJOHNSLIVING.ORG](http://DEMENTIA.STJOHNSLIVING.ORG)



# UPCOMING AFPGV EVENTS

Monday, May 10

4:00 PM - 5:00 PM EDT

**Listening And Talking To Donors:  
Applying Research To Reality**

Wednesday, June 2

12:00 PM - 1:15 PM EDT

**Virtual Small Shops  
Networking Group**

Wednesday, June 09

12:00 PM - 1:00 PM EDT

**Virtual Young Professionals  
Networking Group**

Friday, November 5

**National Philanthropy Day**

**Find out more or register today!**  
Visit [afpgv.org](http://afpgv.org)

# GET INVOLVED!

Join your fellow fundraising professionals and put your expertise to work on one of AFPGV's outstanding committees:

- Education Committee
- Regional Conference Committee
- Membership Committee
- National Philanthropy Day Committee

Visit [afpgv.org](http://afpgv.org) or email [info@afpgv.org](mailto:info@afpgv.org)

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

## Be the Cause for AFP Genesee Valley!

Help advance the profession of fundraising by making a donation today to the 2021 Be the Cause Campaign!

Your investment in the AFP Foundation for Philanthropy will help support local, national, and international programs, including:

- **Diversity & Inclusion** through the planning phase of the North America expansion of New Faces of Fundraising – a multi-year initiative that began in 2016.
- **Professional Development** through professional development grants (formerly scholarships) provide fundraisers and nonprofit leaders with education, training, and leadership development opportunities.
- **Research** that increases knowledge of fundraising, philanthropy, and social innovation includes the Growth in Giving Initiative.

**Donate online at [afpfoundation.org/bethecause](http://afpfoundation.org/bethecause)**

**Thank you** to those who have already contributed to Be the Cause this year!



NATIONAL PHILANTHROPY DAY®

# Time to nominate!

Whether it's a foundation, a business, a fundraiser, or a donor,  
it's time to recognize and celebrate their good work.  
Nominations are now open for National Philanthropy Day 2021.

Please help AFPGV celebrate philanthropy by submitting nominations  
for your standout supporters. Nominations may be made online at  
[www.afpgv.org/npd-nomination](http://www.afpgv.org/npd-nomination) for these categories:

- Outstanding Philanthropist
- Burton S. August Award for Community Leadership
- Robert A. Clinger Outstanding Fundraising Professional
- Outstanding Foundation
- Outstanding Corporation
- Outstanding Small Business
- Outstanding Young People in Philanthropy: Individual or Group
- Multi-Generational Award

**Nominations are due July 1, 2021.**  
**A virtual celebration will take place November 5, 2021.**



# Donor Bill of Rights

**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.



# AFPGV Leadership

## OFFICERS

President: Jillian Carter

Treasurer and President Elect: Jared Longmore

Secretary: Christyn Sanagursky

VP of Marketing: Marisa Post

VP of Membership: Brad Schreiber

## BOARD OF DIRECTORS

2021 National Philanthropy Day Co-Chairs:  
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Be the Cause Campaign Chair: Tiffany Paine-Cirrincone

Communications Chair: Jade Osborne

IDEA Chair: Alyssa Whitfield

Education Committee Co-Chairs:  
Karen Humbert and Kayla Carpitella, CFRE

2021 AFPGV Conference Co-Chair: Joel Elliot

Ethics Chair: Felicia Garcia-Hartstein

Scholarship Chair: Christina DiBaudo

Government Relations Chair: Jennifer Boutte

Membership Chair: Danielle Pierleoni

Board Member at Large: Lauren Dunkle Dlugosh

Board Member at Large: Katherine Mannion

Board Member at Large: Julie Murawski

Board Member at Large: Kristin Cook

Board Member at Large: Gretchen Wood, CFRE

Board Member at Large: Micaela Allen

## OTHER NON-BOARD POSITIONS

NPD Awards Co-Chairs:  
Tracy Schleyer, CFRE and Anne McKenna, CFRE

CFRE Chair: Steve Smith, CFRE

2021 AFPGV Conference Co-Chair: Lydia Palmer

Small Shops Networking Group Facilitator: Krystyna Staub

Raiser's Edge Users' Group Facilitator: Ryan Hyde

Young Professionals Networking Group Co-Facilitators:  
Kayla Himelein and Krista Jenkins

Senior Advancement Professionals Networking Group Facilitator:  
Anne McKenna, CFRE

Social Media Chair: Crystal Sherman

Chapter Administrator: Isha Torres

## 2021 Regional Conference Committee

Co-Chair: Joel Elliot  
St. Joseph's Neighborhood Center

Co-Chair: Lydia Palmer  
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Wayne Bulling  
Parachute Graphics

Melinda Goldberg  
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East House

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Trinity Montessori School

Marisa Post  
ABVI/Goodwill of the Finger Lakes

Ben Thomas  
Tim Thomas and Associates

Isha Torres  
AFPGV Chapter Administrator

Gretchen Wood  
MCC Foundation

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