

THE NEWS RAISER

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Note The Dates:

- 6/2/08—Deadline to register for luncheon
- 6/5/08—AFP Membership Meeting & Program. 11:45 am—1:15 pm, B.S. Roberts Room at OSU-Tulsa.
- 7/9/08- Web Conference
- 8/13/08-Web Conference

June 5, 2008 — Chapter Meeting & Program:

Red Flags for Funders



Frank Merrick

What do foundations want to see when they read your grant proposal? What can you do to absolutely ensure you *won't* be funded? Find out the answers to these questions and many more, as Frank Merrick presents the June program **Red Flags for Funders**.

Frank W. Merrick is President of Foundation Management, Inc., Vice President of The Merrick Foundation, and President of Ward S. Merrick, Inc.

Formed in October of 2000, Foundation Management, Inc. (FMI) administers private foundations, Oklahoma Educational Technology Trust, and Communities Foundation of Oklahoma. Current client assets exceed \$225 million.

It was his decades of service as Director and Vice President of The Merrick Foundation that inspired his interest in forming

FMI to serve the needs to philanthropic individuals and organizations. Today, The Merrick Foundation's assets total \$14 million. As President of Ward S. Merrick, Inc., he manages all aspects of a family business in oil, gas, real estate and venture capital investments.

Frank has extensive experience and involvement with foundation management, charitable organizations, and the grant-making and grant-receiving community. Using this experience, he serves as a consultant for family foundations, both new and established, as well as numerous 501(c)(3) organizations.

A graduate of Oklahoma State University, Frank holds a Bachelor of Science degree in Business Administration. He has also completed post-graduate work in Business Administration and participated in numerous professional training seminars and workshops.

AFP Eastern Oklahoma Chapter June Program

Speaker:	Frank Merrick, President of Foundation Management
Date:	June 5, 2008
Check-in:	11:45 a.m. / Lunch & Program: 12:00 – 1:15 p.m.
Location:	North Hall Conference Center, B.S. Roberts Room, OSU-Tulsa 700 North Greenwood Ave.
Cost:	\$15 members, \$20 non-members
Registration:	Register online at www.afpeastok.org or contact Ruth Richards at rerichards@cox.net .

Deadline to register is Monday, June 2nd



SAGE ADVICE FROM DAVID ZEMEL

Pre-planning?

In tough economic times (e.g., gas pushing \$4 / gallon, recession), offering “sage advice” for development professionals probably shouldn’t begin with quotes from the funeral industry. Nevertheless, there are frequent advertisements from funeral homes offering clients “pre-planning” services; a term that is at best redundant and at worst simply wrong.

According to Wikipedia, planning is “...the psychological process of thinking about the activities required to create a desired future on some scale. As such, it is a fundamental property of intelligent behavior.” Given that definition, what can “pre-planning” actually involve? There are numerous examples of what might be considered the opposite of “pre-planning” which I call “retro-planning.” Organizations engage in retro-planning when they scramble to describe or justify what actually happened (after the fact) because they didn’t design their strategies and tactics to achieve a specific list of desired outcomes before they started their project.

So why the grammar lesson? I think the phrase “pre-planning” is goofy. Still, it may help your organization remember that there’s something that must come before your strategic and tactical planning. In order to offer effective and efficient pro-

grams, to design appropriate policies and procedures, to make good management decisions and to have a strong case for fund raising, your organization must know why it exists. In other words, today and tomorrow depend upon your mission.

The Juvenile Diabetes Research Foundation International (JDRF) used to have what I considered the best of all nonprofit mission statements: “*Cure Diabetes*”. It’s concise, gives donors a picture of what the organization wants to accomplish and sets clear limits on organizational activities. Since having worked with JDRF, they’ve amended their mission (“*To find a cure for diabetes and its complications through the support of research*”). It does distinguish the organization as a funder of research versus a medical research program. As you “pre-plan” for the future of your organization, be sure your mission is as clear, concise and compelling.

Once you’ve fashioned and affirmed the mission, make sure everyone associated with your organization knows it by heart. In addition to including it in all proposals, promotional materials and leading with it in your board and staff orientations, display it proudly and prominently in your facility and in every office. It is there to give your agency direction. It will keep you focused on your business and stand guard over your resources and decision making. It’s a reminder

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Oldies and Newbies Mix It Up!

Oldies and Newbies, Members and Non-members alike enjoyed great food, drink and door prizes at the recent Membership Reception. The new Central Park Hall at EXPO Square provided an interesting setting for the 35 attendees. The reception was held on the second floor overlooking the new 40,000+ sq ft event venue. The event started at 5:30 and officially ended at 7:00 p.m. but several guests were still enjoying each other's company after 7:30.

A special thank you to Donna Stidham, Membership Chair and the members of the Membership Recruitment Committee: Rickye Dixon (Co-Chair), Lee Bartel and Paula Gray for their planning efforts and serving as hosts; and, Jennifer Cordero and Erica Irvine for their planning assistance.



Who wouldn't feel welcome when greeted by the beautiful and charming Rickye Dixon and Paula Gray!



Claudia Meiling and Pat Atkinson chat as Ruth Richards prepares to give the Paparazzi (Lee Bartel) a piece of her mind!



We're a chatty bunch!



Larry Bartley watches in amazement as Kent Stroman feeds his 6'6" body.

FIVE MEMBERS AND NON-MEMBERS WERE WINNERS OF GREAT DOOR PRIZES:

Jill Thompson - \$500 Giftworks Software License (*donated by Abigayle Tobia*)

Brandi Davidson - \$75 Membership Dues Scholarship

Stephanie LaFever - \$75 Membership Dues Scholarship

Larry Bartley - Lunch Meeting Fee Waiver

Claudia Meiling - Lunch Meeting Fee Waiver

ANNOUNCEMENT!

Online Nominations Now Open for 2008 NPD Awards

This year, for the first time, the Eastern Oklahoma Chapter of AFP is offering online nominations for all National Philanthropy Day awards, including:

**Outstanding Philanthropist
Outstanding Volunteer Fundraiser
Outstanding Fundraising Executive
Outstanding Youth in Philanthropy.**

To make a nomination in one of these award categories, go to www.afpeastok.org, look for "Featured Links" in the green box on the right side of the screen. Click on "NPD Nominations."

Be sure to read the nomination requirements!

The deadline for nominations for the 2008 awards is September 12, 2008. Award nomination forms are available only online.

Questions?

Email lynn@sossamon.com
or call 272-5962.

DID YOU FAIL TO FILE A 990?

The Internal Revenue Service plans to introduce a new program this year for charities in jeopardy of losing their tax-exempt status for failure to file informational tax returns, called Forms 990.

Organizations will be allowed to file their missing forms without penalty, paying only a small fee based on their size.

For more information, click below:

<http://philanthropy.com/news/updates/4550/irs-to-offer-amnesty-to-charities-that-miss-disclosure-deadline>

WELCOME NEW MEMBERS!

Debra J Price

Treasurer
United Campus Ministry

Julia Crouch

Executive Director
Bartlesville Community Foundation

Chris Pautler

Managing Partner
Liquid Compass, LLC

INTERESTED IN AFP MEMBERSHIP?

- Visit our local website at www.afpeastok.org to fill out an application on-line.
- Chapter dues are \$50 plus national dues:
\$100 - introductory membership
\$220 - active membership

Contact:

Steve Mason—Membership Recruitment
smason@saintsimeons.org or (918) 425-3583

- Or -

Donna Stidham, CFRE—VP of Membership
dstidham@hospiceofgreencountry.org
(918) 747-2273

- For member scholarship information, contact Donna.

CONTACT INFORMATION: OFFICERS & COMMITTEE CHAIRS

Do you have a question about AFP or an idea that you'd like to submit?
Feel free to contact any of our committee chairs!

President	Pam Richardson	594-8189	prichardson@osugiving.com
President-Elect	Claudia Meiling	280-8656	claudia@rsvptulsa.org
Secretary	Leah Brumbaugh	382-2410	lbrumbaugh@mhat.org
Assistant Secretary	Karen Garren	425-3583 x245	kgarren@saintsimeons.org
Treasurer	Lori Mathis	794-4509	lmathis@tulsacenter.org
Assistant Treasurer	<i>To Be Determined</i>		
Immediate Past President	Nancy Hatfield	585-1117	nhatfield@tnc.org
Long Range Strategic Planning	Suzy Sharp	664-9000	ssharp@seniorline.org
Vice President – Education	Janet Gaskins	619-4747	janet-gaskins@ouhsc.edu
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Audio Conference	David Urich	833-9813	urichda@tulsaschools.org
Youth In Philanthropy	Laura Hailey-Butler	728-3913	lhb@ymcatulsa.org
Conference Chair	Marcia Graham	295-9412	marcia.graham@laok.org
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	Fay Palma	582-7884 x101	fpalma@operationaware.org
Advanced Track	Richard Boone	744-2186	rboone@sjmc.org
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Membership Recruitment	Steve Mason	425-3583 x237	smason@saintsimeons.org
	Ricky Dixon	664-9000x27	rdixon@seniorline.org
Hospitality Chair	Ruth Richards	645-3540	rerichards@cox.net
Diversity Chair	Kristy Long	588-3600	dream@dreaminstitute.org
Vice President - Communications	Larry Bartley	596-7985	lbartle@tulsalibrary.org
Newsletter	Meredith McDaris	592-3333	mmcdaris@thebridgesfound.org
Publicity	Arlene Johnson	493-1994	ajohnsonpr@cox.net
National Philanthropy Day	Paula Hughes Cortner	488-0882 x19	paula.cortner@oke.nmss.org
Awards & Scholarships	Lynn Sossamon	272-5962	lynn@sossamon.com
Chapter Administrator	Abigayle Tobia	261-5838	abigayle@idm-services.com

“Pre-Planning?” - Continued from Page 2)

that you need to ask whether the next program, public pronouncement, fund raiser, budget expenditure or new hire will in fact, help you achieve the specific goals that created your organization.

Your mission isn't static. It should change if the circumstances warrant, and the *March of Dimes* is the classic example. Thanks to the Salk vaccine, the motivation for the *Mother's March Against Polio* was redirected to fight birth defects – a much broader cause but one that benefits from the skills the organization developed in its largely successful fight against polio. May your organization be as successful.

When your mission is clear, concise and compelling; when your board and staff believe in it word-for-word and when it serves as the foundation for your strategic and program planning, your organization is well on its way to achieving its goals.

David Zemel is principal of On Track Consulting, LLC and currently serves as Development Director at the Oklahoma Jazz Hall of Fame.

Upcoming Training from Oklahoma Center for Non-Profits:

June 5th—OSU Tulsa

“Managing for Results” - 8:45 am—11:30 am

\$50 for members & \$70 for non-memebers

“HR1: Laws, Regulations & Policies” - 1:30pm-4:30 pm — \$60

Register at www.oklahomacenterfornonprofits.org

UPCOMING WEB CONFERENCES

July 9

Keep Your Donors, Part 1:
Building Donor-Centered Relationships

August 13

Four Tried and True Keys to Fundraising Analytics

Web-conferences are held at OSU Tulsa from
12:00 pm—1:30 pm (Bring Your Lunch)
Cost: Free for members—\$15 for non-members

Register Online at www.afpeastok.org

The *News Raiser* is published monthly (except July) by the Eastern Oklahoma Chapter of the Association of Fundraising Professionals in Tulsa, OK.

The 2008 Chapter President is Pam Richardson (OSU Tulsa), the Vice President of Communications is Larry Bartley, CFRE (Tulsa Library Trust) and *The News Raiser* Editor is Meredith McDaris (The Bridges Foundation).

The Chapter's web site is www.afpeatok.org

Deadline for articles to be included in *The News Raiser* is the 15th of the month prior to publication. You can send articles and comments to the editor by emailing Meredith McDaris at mmcdaris@thebridgesfound.org