

THE NEWS RAISER



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March 1 AFP Program: Tulsa City-County Library: A Nonprofit's Best Friend for Free Resources



Nonprofit organizations are always looking for free resources to keep expenses low, especially when it comes to the cost of fundraising. The Tulsa City-County Library, through its Foundation Center and other research ser-

vices, offers a variety of free, useful tools including searchable databases that list funders and potential corporate and individual donors, books about nonprofit management, helpful tips regarding 990 forms and many other great materials. Since 1976, the Tulsa City-County Library has served the nonprofit community as a Foundation Center Cooperating Collection. As one of 300 cooperating collections nationwide, the Tulsa City-County Library provides access to materials and services that support the needs of the nonprofit community.

Join Robbie Sittel, Foundation Center Coordinator for the Tulsa City-County Library, as she outlines the resources and services available to the Northeastern Oklahoma nonprofit community. Ms. Sittel joined the library as the Foundation Center Coordinator in February 2006. Prior to coming to Tulsa, she held the position of User Education Librarian at Southern Methodist University.



foundationcenter.org

Note The Dates

- **3/1/07. AFP Membership Meeting & Program.** 11:45 am—1:15 pm, B.S. Roberts Room at OSU-Tulsa. **RSVP deadline is Feb. 26.**
- **3/8/07. AFP Audio Conference.** Noon - 1:30 pm at The Alzheimer's Association, 6465 South Yale, Suite 312. **RSVP deadline is March 5th.**



AFP Eastern Oklahoma Chapter Monthly Program

Date: Thursday, March 1, 2007

Time: 11:45 a.m. check-in
12:00 – 1:15 p.m. lunch buffet and program

Location: B.S. Roberts Room at OSU-Tulsa, 700 N. Greenwood

Cost: \$15 members, \$20 non-members

Registration: Online at www.afpeastok.org or to Ruth Richards at ruth.richards@laok.org

BECOME A PUBLISHED AUTHOR!

AFP members are invited to submit articles for *SAGE ADVICE*, a new column in our newsletter. If you have an area of expertise or a topic of interest to share with your peers, please submit an article of 250 — 400 words to the editor, lynn@sossamon.com.

WELCOME NEW AFP MEMBERS!

James Beven Robison, Jr.
Director Planning & Development
Home of Hope, Inc.
jbrobison@homeofhope.com

Ben Leslie
Director of Development
OSU Foundation
bleslie@osugiving.com

Sue Ann Woodward
sawoodward@sbcglobal.net

Calling All Professionals Who Have Been in the Fundraising Field for 10 or More Years!

Be a part of the steering committee designing an advanced track for education and networking for those who have been toiling for at least a decade (decades??) in nonprofit resource development.

Contact Brenda Michael-Haggard, CFRE, at 918.492.1818 or development@jewishmuseum.net to help further members' professional advancement and to ultimately benefit Eastern Oklahoma's nonprofit organizations.

**SAGE ADVICE
FROM KENT STROMAN**

**Different Than You Think
(What to Expect from Your Next Campaign)**

I am often asked, "Kent, what should I expect during our upcoming capital campaign?" A valid question – on the surface – but my response may surprise you.

I know that you're looking for an answer that you can actually *do something with*. A bit of a checklist, if you will, that will make everything go your way. Do this . . . don't do that . . . and generous, high net worth individuals will automatically flock to your door and fund the entire goal before the campaign is publicly launched. But it's simply not that way.

Successful campaigns are just hard work. They take lots of time. Things don't go as planned. Volunteers take vacations. Jobs get transferred. Foundations change their grant guidelines. And on, and on, and on.....

So, here's the best answer I can offer, "Your campaign experience will be *different than you think*." Hardly a profound revelation. That doesn't sound like the kind of advice that clients would pay their campaign consultant for. Let me explain.

- It will take *longer than you think*.
- You'll raise *less money than you think*.
- The building will be *more expensive than you think*.
- Pledges will be *more difficult to secure than you think*.
- Your campaign will be *harder than you think*.
- The campaign will *cost more than you think*.

But don't be discouraged because . . .

- You'll raise *more money than you think*.
- Your volunteers will be *more inspirational than you think*.
- Your organization will be *more transformed than you think*.
- The result will be *more 'worth it' than you think*.

I'll elaborate on just two of the above, and save the others for another article. Doesn't it seem contradictory to say, on one hand, that 'You'll raise *less money than you think*,' and on the other assert that 'You'll raise *more money than you think*?' Granted these seem opposite. And they are.

But here's the reality: what you think will change – several times – over the course of the campaign.

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A NOTE OF THANKS

2006 AFP Chapter President Stephen Mason received a letter with the following words of thanks to our Chapter:

Dear Stephen,

On behalf of the Board of Directors, our 2,600 volunteers and over 10,700 Girl Scouts served by Magic Empire Council, we want to thank you and the local AFP chapter for selecting our organization as the benefiting organization for the centerpieces at the recent National Philanthropy Day Luncheon. The 20 donated gift baskets, which were stocked with hygiene products and arts/crafts supplies, were put to good use. They have been distributed to various Girl Scouts in our outreach department . . .

We are proud of the work we do on behalf of the girls in our Council. Girl Scouting relies on the generosity of its friends to bring quality programs to these girls. We appreciate your friendship.

We can't say it enough . . . THANK YOU!!

Sincerely,

Lori Mathis, MHR, CFRE

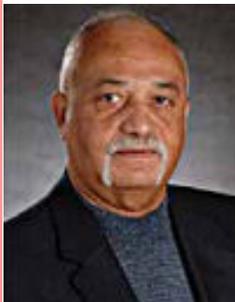
Chief Development Officer

AFP Audio Conference—Thursday, March 8, 2007

NEW DEMOGRAPHICS CALL FOR NEW APPROACHES IN FUNDRAISING

New demographics will affect your bottom line. The population of the United States crossed the 300 million mark this past October. It is not surprising that the majority of this population by the time they reach the age when they normally would consider philanthropy will continue to be women. The population is becoming more multicultural. And, in all regions of the United States there is an expected decline in the proportion of the population that is under 20 years of age.

About the Presenters: Samuel N. Gough, Jr., CFRE, is a Co-Founding Partner and Principal of The AFRAM Group, a full-service, fundraising, consulting firm headquartered in Washington, D. C.



Alandra L. Washington is a program director in philanthropy and volunteerism at the W.K. Kellogg Foundation.



Thursday, March 8, 2007

12:00 noon—1:30 pm

(You can bring your own lunch)

**Alzheimer's Association Office
6465 South Yale, Suite 312
Tulsa, OK 74136**

**RSVP by close of business on
March 5th to Marcia Graham**

marcia.graham@alz.org
918-494-5469

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

The 2007 Chapter President is Nancy Hatfield (Child Abuse Network), the Vice President of Communications is Larry Bartley, CFRE (Tulsa City-County Library) and *The News Raiser* Editor is Lynn Sossamon, CFRE (Strategic Solutions).

The Chapter's web site is www.afpeastok.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 lynn@sossamon.com.

SAGE ADVICE (CONTINUED)

Early on, after two or three successes at the leadership gift level, you'll begin to think, "We can do this! It's not going to be as hard as everyone says." So you think you can sail right past the goal. You *won't* raise as much money as you think at that point.

Then, later in the campaign, after you have already solicited everyone you and your volunteers know, and everyone *they* know, you become convinced that "Ours is going to become the first campaign ever to fail in our community. We've already raised as much money as we can. I just want to go home!" The goal now seems unattainable. But you *will* raise more than you think – eventually.

And, in the final analysis, if the campaign is properly run, and you don't stop too soon, and you use proper stewardship strategies, and continue to develop your donors, you will raise more than the goal.

Then you can go home. Rest. Relax. Take it easy. Forget about your organization. And go back to work to start all over the next day.....

Just remember, it's *different than you think*.

IS YOUR ORGANIZATION REGISTERED?

Development Officers are encouraged to make sure that their organizations are registered with the Secretary of State. This is **REQUIRED** annually (unless you fall under a special exception).

Registration packets can be obtained by going to the Oklahoma Secretary of State's website, or by clicking on the following link:

<http://www.sos.state.ok.us/forms/FORMS.HTM#Charity>

ARE YOU CURIOUS ABOUT WHAT YOUR NEIGHBORS ARE DOING?

Visit the web sites below and you'll have all the scoop on what our neighboring AFP Chapters are doing in 2007.

<http://www.afpoklahoma.org/Newsletter.asp>

<http://www.afpnwark.org/newsletters/newsletters.html>

HAPPY ST. PATRICK'S DAY!





COUNCIL *on* FOUNDATIONS

From the Desk of Phil Lakin

Recordkeeping Requirements for Monetary Gifts

Summary: The Pension Protection Act of 2006 modifies recordkeeping requirements for cash, check or other monetary gifts.

Effective Date: The modification of recordkeeping requirements is applicable to contributions made in taxable years after the date of enactment.

What should donors know about the new recordkeeping requirements for gifts of cash, checks or other monetary gifts?

Regardless of the contribution amount, a donor must maintain reliable written records of a contribution in order to claim a charitable deduction. The Act narrows the type of documentation that will be considered adequate for contributions of cash, checks or other monetary gift. After the effective date, such gifts must be documented by either a bank record or a written communication from the donee.

What information must a written communication from the charity contain?

To fulfill the recordkeeping requirements, a written communication from the charity must contain the name of the donee, the date of the contribution and the amount of the contribution.

What impact does this new provision have on other recordkeeping requirements?

None. This provision does not change any other recordkeeping or substantiation requirements. For example, any gift of \$250 or more must still be documented by a contemporaneous written acknowledgement.

How can charities assist contributors in fulfilling these new requirements?

Charities should consider providing a written acknowledgement of all monetary contributions to assist contributors in fulfilling the new recordkeeping provision.

Where can I find more information about the substantiation requirements of all charitable contributions?

For more information about substantiation of charitable contributions, see IRS Publication 1771, Charitable Contributions—Substantiation and Disclosure Requirements (<http://www.irs.gov/pub/irs-pdf/p1771.pdf>). While the new substantiation requirements are not discussed in Publication 1771, the publication is still helpful to understanding the many substantiation requirements already in effect.

The information provided here is based on our continuing analysis of the bill. Every effort has been made to ensure accuracy of these documents. However, due to the complexity of the bill and the fact that many of these provisions introduce issues that are new to the Internal Revenue Code, please understand that this information is subject to change. The information is not a substitute for expert legal, tax or other professional advice and we strongly encourage grantmakers and donors to work with their counsel to determine the impact of this legislation on their particular situations. This information may not be relied upon for the purposes of avoiding any penalties that may be imposed under the Internal Revenue Code.