

THE NEWS RAISER



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Note The Dates:

- **3/3/08**—Deadline to register for luncheon
- **3/6/08**—AFP Membership Meeting & Program. 11:45 am—1:15 pm, B.S. Roberts Room at OSU-Tulsa.
- **3/11/08**—Web Conference
- **3/20/08**—Web Conference
- **5/8/08**—Web Conference
- **5/20/08**—Web Conference

March 6, 2008 — Chapter Meeting & Program:

Meet **MARK R. GRAHAM**, PRESIDENT AND CEO of the Tulsa Area United Way



*Mark Graham,
President & CEO of the
Tulsa Area United Way*

Mark Graham joined the Tulsa Area United Way as President and CEO in January, bringing years of experience in volunteerism and executive leadership, along with a passion for the Tulsa community. In this position he is responsible for the day-to-day operation of TAUW and for the leadership and direction of its staff. He serves as the professional resource to the Board of Directors and, with the Board Chair, represents the Tulsa Area United Way to the community.

During this program, Mark will give a high-level historical overview of TAUW, and talk about his background and association with the United Way, as well as his involvement in the Tulsa

nonprofit community. He will also address his vision for the future of TAUW and take questions.

Mark has more than 25 years of executive experience in the health insurance and banking industries in Tulsa. Prior to joining TAUW, he was Group Vice President of BlueCross BlueShield of Oklahoma, the state's largest not-for-profit provider of health care insurance.

Mark is a graduate of the University of Oklahoma. A native Tulsan, he is active in the community having completed Leadership Tulsa, Leadership Oklahoma and served on the Vision 2025 Downtown Housing Fund Committee. He has a passion for travel and experiencing other cultures and languages, and has studied Spanish in Mexico and Argentina.

AFP Eastern Oklahoma Chapter March Program

Speaker: Mark Graham, President & CEO of TAUW
 Date: March 6, 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 ruth.richards@laok.org.



Deadline to register is Monday, March 3rd



SAGE ADVICE

FROM LYNN SOSSAMON, CFRE

STEPPING BACK TO MOVE FORWARD

Have You Considered a Development Audit?

Clichés are born when a phrase becomes overly familiar or commonplace. One cliché that applies to many professions, including fundraising, is “S/he can’t see the forest for the trees.” As a development officer, it’s probably rare that you take time for evaluation, so numerous are your duties. But, in fact, it’s critical that you look up from the trees and examine the forest. The Development Audit is a valuable tool for examining your development strategies to determine if you’re applying resources in the most cost-effective, productive manner.

Purpose of a Development Audit

A comprehensive Development Audit evaluates the following development functions and makes recommendations that will increase net contributed income, grow the donor base, improve donor relations, etc.:

1. Readiness for Fundraising

- a. Organizational structure
- b. Strategic plan
- c. Annual development plan
- d. Fundraising policies
- e. Case for support

2. Board’s Role in Fundraising

- a. Board composition
- b. Board performance
- c. Development committee

3. Role of Staff

- a. Department structure
- b. Functions of the development office
- c. Training and educating staff
- d. Role of the CEO in fundraising

4. Systems and Procedures

- a. Donor database software
- b. Hardware
- c. Procedure manual
- d. Internet usage and web site

5. Cultivation and Stewardship

- a. Prospect research
- b. Cultivation strategies
- c. Communications
- d. Acknowledgements
- e. Recognition

6. Analysis of Fundraising History

- a. Evaluate net contributed income from annual giving, major gifts, special events, grants (public and private), direct mail, corporate appeals, and planned gifts
- b. Evaluate efforts to broaden the base of support

Development Audit Process

A Development Audit usually involves an experienced fundraising consultant who can give an objective opinion and someone whom the Board respects. In collaboration with the CEO, board chair, and development officer, the consultant will develop an audit process, which will include the following actions:

- Develop audit goals
- Develop desired audit outcomes
- Conduct personal interviews of staff, board officers, and major donors
- Distribute and compile questionnaires completed by board members and development committee members
- Review materials such as organizational chart, strategic plan, development plan, etc.
- Collect fundraising data
- Analyze fundraising data
- Submit draft of Audit Report to CEO, board chair and development officer
- Develop goals, strategies, and timelines with the development committee and staff to implement audit recommendations
- Present final written Audit Report to the board of directors

Conducting a Development Audit is a major commitment for any nonprofit organization. Not only is there the cost of the consultant to do the audit, but there is also extra work for board, staff, and the development committee. However, **stepping back** and conducting a Development Audit may be the best investment your organization has made in a long time and may be just the thing that will help you **move forward**.

Lynn J. Sossamon, CFRE, is currently working as the director of the Tulsa County Child Protection Coalition. She is also the 2008 Awards and Scholarship Chair for the Eastern Oklahoma Chapter of AFP.

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
Programs	Amy Miller	749-6030 x233	amy.miller@tulsaballet.org
Audio Conference	David Urich	833-9813	urichda@tulaschools.org
Youth In Philanthropy	Laura Hailey-Butler	728-3913	lhb@ymcatulsa.org
Conference Co-Chairs	Marcia Graham	295-9412	marcia.graham@laok.org
	<i>Co-chair pending</i>		
Legal Affairs	Phil Lakin	494-8823	plakin@tulsacf.org
CFRE Training	Tish Stuart	746-2614	tstuart@casciahall.org
	Fay Palma	582-7884 x101	fpalma@operationaware.org
Advanced Track	Richard Boone	744-2186	rboone@sjmc.org
Vice President - Membership	Donna Stidham	747-2273	dstidham@hospiceofgreencountry.org
Membership Recruitment	Steve Mason	425-3583 x237	smason@saintsimeons.org
	Ricky Dixon	664-9000x27	rdixon@seniorline.org
Hospitality Chair	Ruth Richards	295-9412 WK 645-3540 Home	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
	Ben Leslie	594-8438	bleslie@osugiving.com
Awards & Scholarships	Lynn Sossamon	272-5962	lynn@sossamon.com
Chapter Administrator	Abigayle Tobia	261-5838	abigayle@idm-services.com

UPCOMING WEB CONFERENCES

Date	Topic
March 11	Fundraising in a Diverse World
March 20	Negotiation Skills
May 8	Ethical Fundraising: What's the Effect on Your Bottom Line?
May 20	Advanced Annual Giving Techniques: Taking Your Program to the Next level

Web-conferences are held at OSU Tulsa from 12:00 pm—1:30 pm

Cost: Free for members—\$15 for non-members

Register online at www.afpeastok.org

Welcome New Members!

Deborah A Harris
Capacity Building Coordinator
Rogers County Youth Services

Julie A. Bailey
Development Coordinator
DaySpring Villa

Michael W. Brose
Executive Director
Mental Health Association of Tulsa

Ally Chrz
Resource Development Coordinator
Tulsa C.A.R.E.S.

Rob Thompson
Student
Oral Roberts University

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
(918) 425-3583

- Or -

Donna Stidham, CFRE
Vice President Membership
dstidham@hospiceofgreencountry.org
(918) 747-2273

A NOTE FROM ABIGAYLE...

Colleagues and Friends,

It is with great anticipation that Adam and I have decided to relocate to Durango, Colorado with his employer Williams Energy. The company needs a strong project manager to lead several important operations projects and asked him to step up to fill that role. I am very sad to leave so many of my friends but this is a great adventure for me and our family. I plan to continue my work as a consultant and pursue both the CFRE exam in June and the Certified Grants Manager exam in April of 2009.

We will be finalizing the move in late May and I plan to continue serving as the Chapter Administrator until the board is ready for me to hand over those responsibilities. Most of what I assist with is done via the computer and internet and I anticipate a smooth transition to whatever arrangements the board considers in the best interest of the chapter. Until the move is complete I will continue to be active in a variety of chapter activities.

I would like to personally thank each of you for the mentoring, networking, leadership and teaching you have provided me. I have greatly enjoyed the opportunity to serve as the first chapter administrator. It was many of you who helped me realize that fundraising was a fantastic profession I could grow into. At my first AFP meeting I was welcomed and encouraged by so many exceptional people.

As a personal favor I would appreciate any referrals to colleagues in the Southern Colorado or Northern New Mexico area. There are currently no AFP chapters serving the area and I'm a bit nervous about finding ways to network with other fundraising professionals. Please also remember me if your organization needs assistance as I will continue to serve clients throughout the Midwest in a distance consulting format.

It is entirely possible that we will be moving back to Tulsa in a few short years so rather than goodbye I would like to consider this "until we meet again". Each of you has influenced my professional development in a very meaningful way and I will miss you greatly.

Warmly,

Abigayle M. Tobia
Chapter Administrator



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