

AHP Pacific Regional News

March 2008



Regional Director's Message

[Mary Anne Chern, FAHP, ACFRE](#)
Regional Director

As you know, AHP Pacific is one of AHP's largest regions, encompassing nine states and some 800 members, and includes Alaska, Arizona, California, Hawaii, Idaho, Nevada, Oregon, Utah and Washington. We had a banner year in 2007 and we are off to a great start in 2008.

Scholarships and Awards

Many of us support the AHP Annual Fund because we believe in the value of providing scholarships to our members. This year AHP had 70 applications for scholarships, with 18 requests from AHP Pacific members. The AHP Foundation will be announcing the scholarship recipients shortly. **Mary Jane Crist, CFRE** will be calling and e-mailing our members soon looking for support of the 2008 AHP Annual Fund – so please be generous.

We are looking for our 2008 honoree who will receive the AHP Pacific Region Award of Excellence at the AHP Pacific Regional Conference in Portland this June. This award was established to recognize extraordinary service and leadership in the field of health care philanthropic development, and is presented bi-annually to an individual AHP member in the AHP Pacific region who exemplifies vision, dedication, hard work, and has demonstrated both success and impact in the health care development field. It is not an award that is based on tenure in AHP or at a particular institution. Additional information and a nomination form can be found on the [AHP Web site](#). If you have had a mentor in fundraising, now is a good time to think about recognizing that special person.

Educational Opportunities

As usual, the AHP Pacific region members are setting the pace for educational opportunities.

- The AHP Pacific Regional Conference, to be held June 22-24 in Portland, Oregon, will be focused on "Summit to Success: Trekking toward the best practices in philanthropy." Last year's conference was a tremendous success with 220 attendees, and we expect even more this year because Portland was picked by our region's members as the number one site they wanted to visit. Thanks and kudos go to conference chair **Susan Blake**, education chair **John Korb, CFRE**, and their team!
- AHP and AFP of Portland, Oregon co-sponsored an educational seminar on February 19 under the leadership of **John Korb, CFRE** and **Don Russo, CFRE**, AHP's Oregon state representative.
- The Southern California Association for Healthcare Development (SCAHD), which serves as AHP's Southern California roundtable vehicle, will meet five times this year and also has a full-day educational conference scheduled in Los Angeles this fall.
- AHP in Washington State is hosting an educational session with the president of Washington State Hospital Association, on Monday, March 31. Thanks to **Laura Rehrman, FAHP**; **Marite Butners, J.D., LLM-TAX**; **Mark McCampbell, CFRE**; and **Susan Blake** for their work on this program. You can download more information about this session from the [AHP Pacific Web site](#).
- The AHP International Conference is coming up September 24-27 in Chicago. For more information visit the [AHP Web site](#).

- Finally, **Bill Littlejohn**, our AHP Pacific regional director-elect, is working with AHP to identify the location of our 2009 regional conference. If you have input or would like to volunteer to work on that conference, please let Bill know.

Also, I personally participated on behalf of AHP in an educational program in London, England for E.U. fundraisers. We provided an excellent and well-attended one-day session for more than 20 fundraisers. The focus was on sharing best practices in the U.S., E.U., and Australia, and it allowed us to promote AHP and to introduce fundraisers in the E.U. to AHP programs.

Membership and Financial Report – 2007 Year-end Update

As of December 31, the AHP Pacific region exceeded membership goals with 820 members. Congratulations to **Gina Griesman**, our membership chair. Also, I'm pleased to report that as of December 31, we had raised \$26,334 from 200 donors, which was the second highest dollar total of the AHP regions. Congratulations to **Mary Jane Crist, CFRE**, for that successful effort. Many of our AHP Pacific members also have supported the Elizabeth Luna Mourning Endowment fund, which was initiated last year by **Steve Mourning, FAHP**. I'm also pleased to report that the AHP Pacific region supported AHP by significantly exceeding our budgeted income for 2007, and we posted a healthy positive balance for the AHP Pacific 2007 conference in Monterey, California.

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Begin your climb to the summit!

By Susan Blake, AHP Pacific Regional Conference Chair



Your AHP Pacific Regional Conference committee invites you to join your colleagues in Portland, June 22-24, as we explore new ways to take best practices in philanthropy to the highest level.

From the opening keynote address by **Andy Davidson**, president of the Oregon Association for Hospitals and Health Systems, to the closing luncheon presentation by **Kay Sohl**, a highly respected faculty member of the Institute for Nonprofit Management at Portland State University, the conference will provide you with a wide array of valuable educational sessions, innovative speakers and roundtable discussions on timely topics. You will also have opportunities to network with your peers, reconnect with colleagues and make new friends in the fundraising profession. [Click here](#) to begin your climb to the summit.

Please remember to make your reservation early at the conference hotel, the Portland Marriott Downtown Waterfront, as AHP has reserved a limited number of rooms at the special conference rate. See the [conference brochure](#) for full details.

We look forward to seeing you in Portland!

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Extend the invitation of AHP membership

By Gina Griesman, AHP Pacific Membership Chair

Recruiting new members for AHP is a bit like prospecting for new donors—that is, it is always important to **watch, look and listen**. You never know when the opportunity will present itself to plant the seed of member benefits. Sharing the “perks” of membership, such as attending impressive conferences; networking to enhance career development; access to written, verbal and Internet resources; might just catch the attention of a prospective member at a time in their career path that would encourage them to learn more. A simple invite (or ask) is often all it takes to gain that new member.

Retention, on the other hand, is much like stewardship of donor relations that many of us spend a lot of time and effort on. Keeping our colleagues engaged, informed and connected pays dividends for us all.

The AHP Pacific region goal for membership is 861 and we are currently at 828—just a few short of our goal. Moving forward to bring in new members in an effort to reach the target is an attainable goal that can be impacted through the collective intentions of each and every one of us.

Let’s **watch, look and listen** so we can extend the invitation of AHP membership to our fellow fundraisers so they too can enjoy the many benefits.

Thank you.

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Government Relations updates

By Marite M. Butners, J.D. LLM-TAX, AHP Pacific Regional Government Affairs Chair

There are a number of items that deserve our attention as we go into the second quarter of 2008.

The Uniform Prudent Manager of Institutional Funds Act of 2006 (UPMIFA 2006) has been enacted by 14 states, including in our region, Oregon, Idaho, Montana, Nevada, and Utah, and it has been introduced for enactment by California and Arizona. The Financial Accounting Standards Board (FASB) has published a staff position for public comment through April 15, for those states that have adopted the UPMIFA 2006 pertaining to asset classification of donor-restricted endowment funds and public disclosure concerning an organization’s endowments. The FASB Staff Position also mandates additional information for all charitable endowments—including those not subject to UPMIFA. To access the press release summary and the Proposed FSP FAS 117-2-a, visit the [FASB Web site](#) and scroll to the middle of the home page.

Postal Rate Changes. The postal service has announced a list of rate changes to take effect May 12, including the increase of a first class stamp to 42 cents. Postal rates for non profit mailers will depend upon the size and shapes of the envelopes along with other mailing factors, with some rates actually decreasing slightly and others increasing substantially. For current and proposed pricing schedules go to www.USPS.com.

Gift Annuity Rates. The American Council on Gift Annuities (ACGA) is meeting in Chicago from April 2 to April 4. A great many non profit organizations that sponsor gift annuities adhere to the rates recommended by the ACGA. Any rate changes recommended would be effective as of July, 2008. We will provide a special update concerning rate recommendations for any action taken by the Council pursuant to that meeting.

Senate Provides Support for Reinstating **IRA Charitable Rollover**, with enhanced provisions. Senators Byron Dorgan (D-ND), Olympia Snowe (R-ME) and Blanche Lincoln (D-AR) co-sponsored an amendment to the Senate budget resolution for fiscal year 2009, calling upon Congress to reinstate the IRA Charitable Rollover Bill that expired at the end of 2007, as well as enhancing the provisions by allowing life income gift arrangements (Gift Annuities, Charitable Remainder Trusts and Pooled Income Funds) to be included as well. Although this resolution is non-binding, it is a significant first step in getting this beneficial legislation passed again.

Form 990. The IRS has released the redesigned form 990 reflecting charitable activity in 2008 to be filed in 2009. The [IRS web site](#) provides some excellent guidance on the form. Click on Charities and Non profits at the top of the page. Additional information on the form and certain schedules will be available shortly.

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AHP member resources

By Janet DeWolfe, CFRE, AHP Vice Chair, Membership and Communications

The AHP Resource Information Center (RIC) continues to be one of AHP's most highly rated member benefit. Have you ever had to update your policies, develop a gift club, prepare a budget or track trends? These are just a few of the topics that are frequently requested from the AHP RIC.

The three key features of the AHP RIC include:

- The AHP Librarian
- Ask AHP
- Ask a Colleague

If you have ever been frustrated in searching a fundraising issue or topic, the RIC can reduce your stress and provide solutions. The **RIC Library** has a full-time librarian on staff who provides personalized service to assist you with a customized search. To Ask the Librarian, e-mail the RIC at ric@ahp.org or call 703.538.3149, Monday through Friday, 8:00 a.m. – 4:00 p.m., ET. Response time is seven to 10 days.

When you need to find an answer to your question fast, you can go online and access **Ask AHP**. This online service allows you to ask questions about annual giving, major gifts programs, capital campaigns, special events, direct mail, stewardship, donor recognition, personnel issues, foundation governance, and a host of other topics. This service is available 24 hours a day; seven days a week; and you will receive a personalized e-mail answer within 24 hours. To use Ask AHP, go to the [AHP RIC online](#) and type your question – it's that easy!

Sometimes your best source of information is from colleagues. The **RIC Listserv** is an online service driven by AHP members. You can ask questions, share knowledge, keep in contact with other members and search the archives for past questions and responses. To Ask a Colleague, you simply join the AHP Listserv and post your question. To join the Listserv, visit the [RIC online](#).

To keep the RIC Library's information current, please consider sharing samples from your shop of newsletters, policies, job descriptions, campaign materials or anything that your colleagues would find helpful. Contributions to the library are always welcome. Send samples to AHP RIC Library, 313 Park Avenue, Suite 400, Falls Church, VA 22046, or by e-mail to ahp@ahp.org.

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Life Balance: Annual Exam, Part II

By Mark McCampbell, CFRE, AHP Pacific Regional RIC/Communications Chair

Note: This is the second installment in a new series that looks at several components the health care philanthropy fundraising professional needs to review in 2008 to assure optimal success and achievement of goals.

March: Already at the end of the first quarter, the year is speeding along. With your annual and long-term plans in place, monthly and quarterly goals established, it should be fairly visible to you at this point where you are in progress toward what you hope to achieve in 2008. Both professionally and personally, goals are important not only to give us something to reach for but also to measure accomplishment. Like the man throwing darts at a blank wall, not having a target makes it impossible to know if you've hit it.

In *Life Balance: Annual Exam*, published in the January 2008 AHP Pacific regional newsletter, we looked at the first checkpoint in the annual exam: having the right **experience** level in your fundraising organization to enable you to hit your targets. If you assess your experience level and that of your staff and find you don't have what you need, there are steps you can take to get more experience on your team.

Another important checkpoint is **professional growth**. What are you doing today that will help you grow professionally? It's hard to imagine becoming stale and complacent in an environment that is as dynamic and constantly changing as health care. Yet, while engaged in the drama of reduced reimbursements, physician flight, facility replacements and technology advancements, the fundraising professional may revert to the same plan that's worked in the past. If it worked last year, why won't it work this year? The February Board Campaign, the May Golf Tournament, the October Gala, the November Employee Campaign and the Year-End Tax Mailing may have worked well enough, but when it comes to raising the bar, producing extraordinary results requires a new approach.

Similar to what some consider a definition of insanity – "Doing the same thing you've always done and expecting a different result" – following the same fundraising plan when faced with an increasingly demanding fundraising goal makes little sense. How do you engage in new thinking in order to achieve new results? Professional growth is the portal to new thinking.

Professional growth sounds like it might involve hundreds of credit hours in an advanced degree program, or continuing education credits amassed through attending seminars and workshops. Growth can begin, however simply, by doing what you're doing right this moment: reading professional literature. Through AHP, there are many resources at hand that can get you started. Articles authored by other fundraising professionals are seeds that are planted in your mind and lead to new ideas.

Reading is growing. To follow is a book list that can get you thinking differently and help you grow professionally. These aren't necessarily new publications. The proliferation of reading material is so vast it can be paralyzing. These are books that have proven to produce effective change in the lives of those who have read and applied the ideas and examples within their pages.

Toyota Talent, by Jeffrey Liker and David Meier
Better Thinking, Better Results, by Bob Emiliani, David Stec and Lawrence Grasso

The Heart of Change: Real-Life Stories of How People Change Their Organizations, by John Kotter and Dan Cohen

The Speed of Trust, by Stephen M. R. Covey

Death by Meeting, by Patrick Lencioni

The Nordstrom Way to Customer Service Excellence, by Robert Spector and Patrick McCarthy

Be Iron Fit, by Don Fink

Some in the fundraising profession might look at this book list as not being “fundraisey” enough, especially the last title, which is about training for an Ironman competition. That’s just the point of professional growth, however. The ideas that will get us thinking in new ways, better ways, to approach our age-old profession in a different way and achieve different results, may come to us from outside our own profession. What ideas about effective time management could top those coming from an Ironman training plan that challenges you to add twenty hours a week of training to an already full professional life? How many people have read *The Nordstrom Way* to help improve their donor services philosophy? Truth is truth wherever you find it. Look outside the fundraising profession and apply new business ideas. You’ll be growing professionally and helping your organization reach new heights in fundraising success.

However you achieve growth in your profession this year—whether you attend a conference, take higher education courses, expand your reading list or get involved in networking with fellow professionals—you’ll improve your overall fundraising health. Someone said, “If you’re not growing you’re declining.” Take on a new challenge and find a new way to think about it. Invest in your professional growth.

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If you have something you would like to read about, write about, talk about, or think about, please let me know at mark.mccampbell@vmmc.org and we will be happy to accept your suggestions, contributions and articles.

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