

## AHP Pacific Regional News September 2008



### Regional Director's Message

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

This is my last newsletter article as the AHP Pacific regional director, and I have enjoyed every minute of the past two years.

I will be transitioning regional director duties to Bill Littlejohn immediately following the AHP International Conference in Chicago, and I look forward to taking on a new role on the AHP Board as vice chair of membership and communications. If you have suggestions or ideas on how we can improve service to members in these areas, please let me know!

AHP means a great deal to me. An AHP ListServe "epiphany" by Steve Mourning, FAHP, of Jerold Panas, Linzy & Partners, reminded me recently how invaluable the friendships and collegial support provided by AHP members have been to me over the years.

In case you missed it, Steve's ListServe epiphany referenced a YouTube video clip, "Kate and Gin the dancing dog - Britains Got Talent 2008." A 16-year old girl and her dog, Gin, perform in a competition much like "America's Got Talent." The dog dances by her side, leaps and jumps on command, and performs brilliantly. The dog gets a standing ovation. How great the dog is, how intelligent the dog is—how talented!

Of course, no one mentions the girl who trained the dog. Steve notes that sadly, "those who create an environment for excellence and success should share in the glory and all too often, they don't." I think every fundraiser has had this experience. Steve's second observation is "how much sheer pleasure the dog clearly took in being involved in a process that was a lot of hard work . . . . Sy Seymour's favorite quote, 'involvement breeds commitment,' is true even for dogs."

I have been involved in hospital philanthropy for 25 years. Some days I feel more like the girl, and some days I feel more like the dog. But no matter what, my AHP friends are always there to root for me, and applaud for me. Thanks guys! It truly has been a privilege and an honor representing the AHP Pacific region as your regional director for the past two years.

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## Report from the Summit

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*By Susan Blake, AHP Pacific Regional Conference Chair*



More than 270 attendees from the AHP Pacific region went trekking toward the best practices in philanthropy June 22-24, when they attended the region's educational conference in Portland, Oregon. The conference experienced near-record attendance for its educational sessions and networking opportunities. Below are just a few of the conference highlights.

The conference explored a key best practice in health care philanthropy—the involvement and participation of health care CEOs. Andy Davidson, president and chief executive officer of the Oregon Association of Hospitals and Health Systems, presented the conference keynote address. A CEO panel moderated by Tom Wilson, Campbell & Company, focused on CEO's perspectives on philanthropy and provided conference attendees opportunities to submit questions for further discussion. Andy Davidson's power point presentation, "[What is it about 'Free Money' that Health Care Administrators Don't Understand?](#)" can be viewed at on the Members Only section of the AHP Web site.

Track Deans Pamela Doherty, CFRE, Julie Jones Manning, CFRE, and Ann Thompson-Haas, FAHP, orchestrated the 30 speakers who shared their expertise at the 12 educational sessions that highlighted best practices in fundraising, relationships and leadership.

The "Taste of Oregon" social event organized by Julie Jones Manning provided attendees with a memorable opportunity to network while sampling some of Oregon's premier wines paired with gourmet foods from the region.

I would like to express my appreciation to the hard working members of the regional conference committee, including Education Chair John Korb, CFRE; Regional Director Mary Anne Chern, ACFRE; Sponsorship Chair Bill Littlejohn; Primer Chair Dick Green, FAHP; Newcomers Chair Don Russo; Hospitality Chair Kelly Buechler, CFRE; and Roundtable Co-chairs Ron Latham, CFRE and Dick Kellogg.

A special thanks to our conference sponsors:

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White Memorial Medical Center Foundation**

According to Bill Littlejohn, incoming AHP Pacific regional director, plans for the 2009 regional conference, scheduled for April 19-21 in San Diego, are already underway. Christina Jordan of Sharp HealthCare Foundation is serving as conference chair. Contact Bill, [bill.littlejohn@sharp.com](mailto:bill.littlejohn@sharp.com), or Christina, [christina.jordan@sharp.com](mailto:christina.jordan@sharp.com), to volunteer to serve on the conference committee or to help at the conference.

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## **Government affairs updates**

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

### **Negotiations continue on Tax Extenders**

The Senate will shortly vote on Senate Bill 3125, a modified version of House Bill H.R. 6049, containing, among other legislative items, the tax extenders including the charitable giving incentive of the IRA rollover. If passed, the legislation would include Midwest flood relief charitable tax incentives. It looks like we are getting close and we will keep you posted!

### **UPMIFA**

Since our last update, California Bill S.B. 1329, which provides for the Uniform Prudent Management of Institutional Funds Act (UPMIFA), has passed both houses. UPMIFA, among other things, incorporates guideline provisions of the Uniform Prudent Investor Act and the Management of Institutional Funds Act. A significant feature of the new bill is the treatment of endowment fund distributions that would allow distributions from endowment funds that are below their historic dollar values (funding amounts). In the current economic and investment climate, this may be significant for new endowment funds that have declined in value since their inception. As of this writing, in our region, Oregon, Utah and Arizona have all passed UPMIFA. Washington, Alaska and Hawaii have not introduced the legislation.

### **IRS Form 990**

The Internal Revenue Service released [revised instructions](#) for the redesigned Form 990 August 19th, along with additional [background documents](#) to help nonprofits make the transition to the new form. Adjustments were made in areas including: narrowing the definition of key employee; allowing reasonable efforts for obtaining information about interested or third parties in certain sections; and the standard for determining independence of board members. Clarifications were also made in reporting compensation, including revised definitions for deferred compensation, compensation paid by related organizations, and compensation paid to former employees. Other changes include a narrowing of the definition for "business relationship" in the Governance section, and clarifications on thresholds for reporting transactions with interested persons in Schedule L.

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## Navigating the CFRE application process

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*By Dena Cochran, AHP Pacific Regional Education/Certification Chair*

In the last regional newsletter, we talked about why you should consider becoming a Certified Fund Raising Executive (CFRE). In this newsletter, I'll give you tips on completing the application. Remember, the exam is given four times a year at over 300 test sites across the country. **October 24** is the remaining test date for this year.

Achieving CFRE is a three-step process. The first step is the application, and don't underestimate the time it will take you to complete it! The second, and probably most important step, is preparation; and the third step is the exam itself.

You should begin by [reviewing the CFRE application](#) on the CFRE Web site. CFRE has an online form that allows you to store your accomplishments over time. When you look over the application, you'll see that it is set up on a point system with minimum point requirements in each of several categories. The online form will keep a running tally of your progress toward garnering the needed points.

The first category is **education**, and when you look at it, you will realize that you should have kept much better records of all the educational conferences, seminars, and video conferences you attended in the past. Don't feel alone. Almost everyone has the same challenge. Rather than giving up, try perusing your old paper and electronic calendars, your educational files, and those piles of educational materials that you've collected from conferences and have been intending to read.

AHP and CFRE have also created a [point tracker system](#) for the AHP regional and International Conferences. Be sure to download the point tracker form before you attend a conference. You can also use these as a resource to determine your educational hours from past AHP conferences—forms from the past five years are available.

The second category is **professional practice**, which you can fulfill by having at least five years of fundraising experience.

Next comes **professional performance**, which you can meet in three ways. You can cite communications projects that directly impacted fundraising and/or management projects that had a measurable impact on the success of fundraising. You will also receive points for the actual funds that you have raised.

Finally, in the **service category** you earn points on a sliding scale, depending on your level of involvement in professional associations and community organizations. For example, serving as a board officer nets you more points than simply belonging to an organization.

None of this is difficult, but it can be time consuming. Keep reminding yourself that it is worth the effort—because it is! Achieving CFRE status will make you a better fundraiser and will open up your career to new opportunities.

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## AHP Pacific membership update: We need your help

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*By Gina Griesman, AHP Pacific Regional Membership Chair*

The AHP Pacific region goal is to reach 861 members. Current membership is 836, or 97% of our target. The AHP regions will be recognized at the AHP International Conference in Chicago for achieving our membership

goals, so please help us recruit the last 25 members by encouraging your staff or other professionals in your community to join prior to the conference, which begins September 21st.

[Membership information and forms](#) are available on the AHP Web site.

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## **Inspirational Philanthropy: "The Choir Dress"**

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*Editor's note – My personal goal these past 24 years working as a professional fundraiser has been to help people experience the joy in making a philanthropic gift. Inspirational stories help to illustrate joyful giving. Do you have a brief story to share? Please send it to [korbja@ah.org](mailto:korbja@ah.org). We will include these brief stories in future issues of the AHP Pacific Regional Newsletter.*

### **The Choir Dress**

*By John Deming*

(Reprinted with permission from *The Ministry of Philanthropy*)

Mention the word "philanthropist" and one's mind turns to names famous and faces familiar. Large sums of money for well-known causes or institutions. Call the person who gives \$10 or volunteers at a soup kitchen "philanthropist" and a look of incredulity might spread across their face.

At phonathon time, we ask students to help call our alumni to see if they would be willing to give this year. For this privilege, we provide supper in addition to a small monetary sum as an expression of thanks. Last year "Sue" was one of those students. She was a freshman and the oldest of five children in a single-parent home, working during the summer and school year to help pay her tuition. What teenager couldn't use some extra dollars?

The calling began and soon Sue's cheerful and friendly voice encouraged alumni to give gifts large and small. A bit nervous at first, she came to see the purpose of calling and even enjoyed making contacts.

At evening's end, Sue's eyes sparkled as she received her money. But then the unexpected happened. Could she make a contribution? If others had given, why shouldn't she? And with that, she returned a portion of her earnings. But the story doesn't end there.

Sue was a member of the school choir for which the young women were asked to purchase long black dresses to wear for performances. Knowing her mother didn't have the money to buy her dress, Sue began saving her extra money. She needed the dress in time for the Christmas program.

December came and Sue found out that Christmas was going to be a bit slim for her younger brothers and sisters. She finally had the money for her black choir dress, but was that the thing to do in light of upcoming Christmas?

Sue made her decision. Gifts for siblings were more important than a dress for her.

A few days before the concert, our choir director learned of the situation and relayed the story to us in the office. "Anything we can do?"

Yes, we could do something. The school family had created a fund to assist students just when they needed a little boost of encouragement. Conferences, varsity sports fees, maybe even a choir dress.

Are more words needed to describe the joy in the office and the look on Sue's face when she received the money for her choir dress?

All gifts aren't million-dollar donations. Some are more than gifts. They are lessons. Sue taught us that.

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*If you have something you would like to read about, write about, talk about, or think about, please send your suggestions, contributions and articles to [korbja@ah.org](mailto:korbja@ah.org).*

*John Korb  
AHP Pacific, RIC/Communications Chair*

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