

## AHP Rockies and Southwest Regional News April 2008



### Regional Director's Report

Barbara Larson, CFRE  
*Regional Director*

As we move quickly forward in 2008, our regional conference is just ahead. We have already heard that many of our 492 members of the Rockies & Southwest Region will be joining us for a Fiesta of Philanthropy at The Westin Riverwalk. San Antonio provides a unique blend of cultures and an exciting atmosphere for education, networking and refreshing the spirit—all essential elements for the successful development professional. Our room block at the Westin is now full, but other hotels in the area have accommodations. Make your reservations soon.

Special thanks go to our conference chair, **Charley Scarborough, CFRE**, and our conference volunteers for their outstanding work. Education co-chairs, **Susan Nutt** and **Stephanie Young** have created an outstanding mix of educational offerings from well-qualified presenters. You won't want to miss any of these great sessions where you'll be informed, educated and inspired.

Additionally, I want to thank our many sponsors and exhibitors who loyally support our regional conference each year. Please take time to view their booths in the exhibit area. They provide a unique service to our profession to make our jobs easier and our organizations more effective.

Most of all immerse yourself in the special culture of the AHP Rockies & Southwest Region. We represent our profession from the great states of Arkansas, Colorado, Montana, New Mexico, Oklahoma, Texas and Wyoming. You'll find your colleagues in this region to be a friendly, sharing and fun bunch. After a day of education, find some time to hangout with the crowd.

Enjoy the fiesta!

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### Refresh your fundraising skills in San Antonio

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*By Charley Scarborough, CFRE, AHP Rockies & Southwest Conference Chair*



The first Native Americans here called it Yanaguana, or "refreshing waters," and you can still find refreshment at the banks of the San Antonio River of today. We hope that you will join us in refreshing your

fundraising skills and enthusiasm while networking with your tribe of development professionals from across the Southwest and Rockies regions at the AHP Rockies and Southwest Regional Conference. A few highlights you won't want to miss:

- Keynote speaker **Jack Rahaim** will present an innovative session about using the Internet to build a sense of community, identifying your institution's core competence, and using it to differentiate yourself in the market and integrating philanthropy into how you do business. Join in the discussion as Jack encourages attendees to come prepared with questions for an interactive discussion.
- Plenary speaker **Ramsay Slugg** will provide tips from U.S. Trust Bank's latest research on how the top three percent of America's most wealthy households decide on how they make 63% of our country's charitable gifts.
- Education tracks that run the gamut of topics to meet your needs—from the latest practical strategies in completing a successful \$83 Million hospital campaign to a small but amazingly effective employee giving program.
- A day-long Primer on health care fundraising for the newly minted fundraiser, where a panel of experts will present a program to get you started confidently raising money the day you return to the office.
- A wonderful conference venue at the Westin Riverwalk, which combines historic Spanish charm with new world luxury to create a relaxed atmosphere in which to learn and network with colleagues.

So join friends and colleagues at the most sought after convention destination in the Southwest for a Fiesta of Philanthropy at the AHP Rockies & Southwest Regional Educational Conference. Visit the AHP Web site for more [conference details](#) and registration information on the AHP Web site.

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## Speaking of the Regional Conference...

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Special thanks to our regional conference committee and to our conference sponsors.

### 2008 Conference Committee:

*Conference Chair*  
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Seton Williamson Foundation  
Austin, TX

*Capital Campaign Track Dean*  
**Rick Kammerer, CFRE**  
Memorial Hermann Foundation  
Houston, TX

*Education Co-Chair*  
**Susan Nutt**  
University of Texas  
Houston, TX

*Special Topics Track Dean*  
**Amanda Pilcher**  
The Methodist Hospital  
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Houston, TX

*Education Co-Chair*

*Primer Chair*

**Stephanie Young**  
University of Texas  
Houston, TX

**David E. Krause, FAHP**  
The Seton Fund  
Austin, TX

*Annual Giving Track Dean*  
**Heather Bradford**  
Methodist Health System  
Foundation  
Dallas, TX

*Sponsorship Co-Chair*  
**Kyle Landry**  
The Seton Fund  
Austin, TX

Major Gifts Track Dean  
**G. Christler Crews**  
Covenant Health System  
Foundation  
Lubbock, TX

*Thanks to our Overall Conference Sponsor*

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## 2008 AHP Annual Fund

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*By Robert Glick, AHP AHP Rockies & Southwest AHP Foundation Chair*

The AHP Annual Fund provides the resources for AHP to remain proactive and forward thinking. While the operating budget allows AHP to maintain core services for its members, your support of the Annual Fund secures services that benefit you and the profession.

When you give to the Annual Fund, you reaffirm your belief in the benefits of the philanthropy profession and its advancement. For 2008, part of your donation will support AHP's initiative to conduct a future study of health care, philanthropy and the healthcare philanthropy profession. It will also continue to support AHP's Web enabled initiative.

The future of health care is uncertain but one thing is clear: we can expect fundamental change. AHP will explore the possible futures for health care and examine their impact on health care philanthropy including their impact on your institutions, your donors and your profession.

Please enrich our profession with your personal gift to the Annual Fund. Visit the AHP Web site to make your [pledge online](#).

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## Member News & Professional Development Opportunities

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Congratulations to the newest Certified Fund Raising Executive (CFRE) in our region: **Lee Ann Deal, CFRE** with Scott & White Memorial Hospital in Temple, Texas. We congratulate your achievement and encourage others to follow your lead.

AHP is seeking proposals for the 2008 [AHP Professional Paper Competition](#). This is a great opportunity to investigate a particular area of interest or expertise on your own or with colleagues and have your results published. To aid in research and writing efforts, the winner receives a \$1,000 grant, and the resulting article is published in the *AHP Journal*. The deadline for submissions is **June 12**.

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## "The Madison Experience": A Personal Account

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*By Tami Loch, Director of Development, INTEGRIS Foundations*

Last July, after an exciting plane trip to Madison, Wis., I began what would be the best week of training I have ever received—the 2007 AHP Madison Institute.

Before I left, I was very curious and a little nervous about Madison; all I had heard was that it was a very intense program. The first evening was a short introductory class session, where we discovered our six-pound study guide, a social hour overlooking beautiful lake Mendota and a dinner to meet the faculty.

I attended the Annual Giving track, which was centered on "Donor Focused Annual Giving," expertly led by **Ann Thompson-Haas, FAHP**, and **Debbie McGarry, CFRE**. The Annual Giving Track had 59 students – the second largest Annual Giving track in Madison history. The next five days were filled with intense and enlightening studies, role-playing, group assignments and networking. A variety of speakers was brought in to share their expertise. There were many question and answer periods with both the faculty and our colleagues. I can truly say I learned much and that I am excited and motivated to apply what I learned to my position.

The faculty members were full of energy and excitement, each with their vast knowledge, extensive fundraising experience and commitment to the profession.

Madison was not all work and no play; our evenings were filled with socials, dinners, karaoke and shopping. Madison's State Street, which led directly to the State Capitol, was filled with specialty shops and restaurants. Beautiful Lake Mendota was near the conference site. There was always something to do within walking distance.

The best thing about Madison was the people I interacted with during my stay. I talked to many people who were in different stages of projects like mine. We discussed our successes and failures and encouraged each other. Even when class was over for the day, I noticed groups of peers discussing their programs and giving and receiving advice late into the night. I came home with many new friends and contacts that I will surely use as resources sometime in my fundraising career.



*Tami Loch (at left) networking with other attendees at the 2007 AHP Madison Institute.*

The last night of Madison was a huge party, arranged by the Capital Campaign Track. The theme of the party was "Dancing with the Faculty." Each class had to perform a dance number from the 1960s with one of their faculty members. I am pleased to report that the Annual Giving Track won the event with our version of "Proud Mary."

After attending Madison, I can tell you it was an intense five days, but worth every minute of it. I hope I have the opportunity to go back every year. This is the educational experience that I would suggest attending above all others, whether you are a new or seasoned development professional.

Make plans to attend the [2008 AHP Madison Institute](#) to be held July 12 - 17, 2008. You will not be disappointed.

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## **Another Excellent Reason to keep your GuideStar Listing Up-to-date**

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The philanthropic community is buzzing with the ABC network's new show, "Oprah's Big Give." More than 15 million people tuned in to watch the premiere, in which contestants worked to change people's lives and "give big or go home."

Visitors to Oprah.com and ABC.com are also given the opportunity to "give big at home," and are directed to the Network for Good Web site, GuideStar's long-time partner. Powered by GuideStar, visitors use the information on the site to make their giving decisions and to donate to their favorite charities.

Make sure your organization's information is presented fully and is up-to-date by completing your GuideStar information form at [www.guidestar.org](http://www.guidestar.org).

*(Source: GuideStar E-News)*

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## **Government Relations updates**

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[Reminder: U.S. Postal Rate Increases](#)

The recently announced United States Postal Service increased prices for mailing services go into effect May 12, 2008. The price of a First-Class Mail stamp will increase a penny to 42 cents and changes will also affect non-profit mailers. The Direct Marketing Association has created an analysis of the new pricing. Click the "Standard Mail" tab on the [DMA cost analysis](#), and scroll about half-way down to view the non-profit pricing and the percent change between the current and new rates.

#### IRS updates

*Form 990:* Comments for the redesigned Form 990, that public charities and tax-exempt organizations will be required to file annually beginning in 2009, are due by June 1. The IRS also released [new draft instructions](#) which include new tools, such as a glossary of terms, a sequencing list suggesting the order in which to fill out the form and schedules, a table to help organizations determine where to report different types of compensation and benefits, and examples to illustrate definitions or new requirements. The IRS is requesting comments on all aspects of the draft instruction, including suggestions that might further reduce complexity or burden.

*Excess benefit regulation:* The IRS recently issued a final rule that explains the factors it will consider in determining whether a 501(c)(3) organization that engages in excess benefit transactions will lose its tax exempt status. The [new regulation](#), which is now in effect, finalized a proposed rule that was issued in September 2005. Organizations will find that the guidance is helpful in establishing their own procedures for setting executive compensation and for correcting problems when they are initially discovered.

*Web site updates:* The IRS has added new materials for nonprofits on its website. There is now one [IRS Web page](#) that centralizes federal tax resources commonly needed by tax-exempt organizations that compensate their employees along with [IRS guide sheets](#) to help uncover abuses involving supporting organizations.

"Principles for Good Governance and Ethical Practice": A Guide for Charities and Foundations.

The Panel on the Nonprofit Sector has released a new publication, "Principles for Good Governance and Ethical Practice." The Guide represents the first time that charities and foundations reflecting a broad cross-section of the American nonprofit community have come together to develop principles of ethical conduct, accountability, and transparency that they aspire to and encourage all organizations to follow. You can find the guide and more information at [www.nonprofitpanel.org](http://www.nonprofitpanel.org).

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## **Your 2007-2008 AHP Rockies & Southwest Region Cabinet**

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Please feel free to contact your 2007-2008 AHP Rockies & Southwest Cabinet members with questions and/or suggestions so that we can best represent you and your needs.

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