

AHP Rockies & Southwest Regional Newsletter: March 2010



Remarks from the Regional Director

Rick Resnik, CFRE
Vice President
The Seton Fund

Welcome to all of my friends and colleagues. I hope you enjoy our first regional newsletter of 2010, and I look forward to meeting as many of you as possible during the coming year. If you have not already done so, please take a moment to view your [2009-2010 AHP Rockies & Southwest Cabinet](#). Each of these individuals volunteers their time and energy to ensure that you have an outstanding membership experience, from relaying regional information to tailoring regional educational curriculum. And we are more than happy to hear from you.

Speaking of our regional volunteers, many of them are hard at work planning the upcoming 2010 AHP Rockies & Southwest and AHP Pacific Joint Regional Conference in the Valley of the Sun, Phoenix, Ariz. The conference will be held **April 25-27, 2010** at the Sheraton Phoenix Downtown. It will be a great opportunity to learn while visiting with old friends from our region and meeting new colleagues from the AHP Pacific region.

Our conference program will focus on presentations from development professionals and discussions about best practices in every area important to your career from physician relationships to leadership. For the [full conference schedule and registration details](#), visit the AHP Web site. There is a discount for early registration if you register by this Friday, **March 12**, so don't miss the deadline!

Special thanks to our conference co-chairs, **Michael J. Duran, J.D.**, vice president and chief development officer of the Tucson Medical Center and **Donna Budak, CFRE**, director of campaigns for the The Seton Fund in Austin, Texas. I also want to acknowledge the support of our conference sponsors, **DINI Partners**, **Henderson Mallory Partners** and **Sharp Healthcare Foundation**.

I hope to see you all in Phoenix in April. This is going to be a great meeting that will assist you in advancing your career through learning and networking.

Best regards,

Rick Resnik, CFRE
Regional Director
AHP Rockies & Southwest Region

AHP Texas Roundtables - See How They Do It!

Texas AHP members have embarked on an experiment to bring educational resources to our members in Texas who might not be able to attend the regional or international AHP conferences due to budget or time restrictions. These are entitled "See How They Do It!" roundtables and have been hosted by various Texas institutions. It is our hope that the Texas roundtables can serve as a model for other regions and states to present practical strategies and tactics for development at the state/regional level.

Dell Children's Medical Center hosted the first roundtable on November 4. **Gene Attal, FAHP**, president, fund development, the Seton Family of Hospitals and **Missy Wood, CFRE**, executive director of the Children's Foundation in Austin shared the success story of Dell Children's Medical Center, which exceeded its \$75 million campaign by \$11 million.

On February 11, 2010, Parkland Foundation (Dallas) President and Chief Executive Officer **David Krause, FAHP**, shared his insights for area professionals on best practices for fundraising, as well as current giving trends and the philanthropic challenges in a difficult economy. Parkland is engaged in a \$150 million campaign and has reached the halfway mark with two major gifts from foundations. Other speakers from Parkland Foundation included **Anne Leary**, vice president, principal gifts; **Melissa Atkinson**, vice president, community strategies & gift planning; **Janet Harrison**, vice president development; **Jill Hassman**, director of operations; **Beth Broyles**, annual giving officer; and **Cindy Scott**, development officer.

The next roundtable event will be held on **April 15, 2010** and will be hosted by MD Anderson Cancer Center in Houston. The presentations will focus on the Center's \$1 billion campaign which just entered into the public phase after reaching \$760 million in gifts. The roundtable will feature **Patrick B. Mulvey, CFRE**, vice president for development at MD Anderson. For [more information](#) about this exciting event, please visit the AHP Rockies & Southwest Regional Community Web site.

Bulk up our Regional Membership While Potentially Lightening your Wallet

There are currently 512 AHP members in the AHP Rockies & Southwest Region; up from 507 in January of 2010. Our goal for 2010 is to increase our regional membership by three percent to 521 members by the AHP Annual International Conference.

Do you know someone who would benefit from the professional comraderie and educational resources AHP has to offer? Help plug them into the profession and help us reach our regional goals by asking them to join AHP.

Now they can join for \$30 off (or 15% off if they are joining as institutional members). There is also an added benefit for you as the recruiter. Starting this month, when you recruit someone to join AHP, your name is entered to win a free AHP regional conference registration! And if you recruit an entire institution, your name will be entered to win a free registration for an AHP Regional Conference *or* for AHP's Annual International Conference (a \$595 value!). Don't delay, the offer ends **March 31, 2010**.

Here's how you can encourage your colleagues to join:

- Direct them to the [Membership section of the AHP Web site](#) to join. They must complete the Member-Get-A-Member application. Make sure they fill out YOUR full name in the "Recruited by" section of the membership application.
- You also can print off the [Member-Get-A-Member join application form](#) and hand deliver it to your colleague. Make sure YOUR full name is entered in the "Recruited by" section of the membership application.

Rules of the campaign:

- The discount only applies to non-members and institutions who have not been an AHP member for at least one year, and it cannot be applied toward dues renewal.
- The name of the member recruiter MUST be included on the Member-Get-A-Member application in order for the recruiter's name to be entered into the drawing.
- Random drawings will be made on **April 2, 2010**, and winners will be contacted immediately.
- Individual and institutional members **MUST** submit their application by **March 31, 2010** to receive the discount and for the recruiter's name to be entered into the drawing.

For more information on encouraging your colleagues in development to become members of AHP and the benefits of membership, please contact me at brubio@seton.org.

Bryan Zea Rubio, CFRE
Membership Chair
AHP Rockies & Southwest Region

Government Relations Report

Health Care Reform

During his State of the Union address on Jan. 27, the President made an appeal to Congress for continued efforts on national health care reform. Although the bulk of his speech focused on other domestic issues, the President vowed not to abandon his health care agenda, cautioning that if changes are not made, both Medicare and Medicaid spending will skyrocket.

The White House released its [health care proposal](#) on Feb. 22 in advance of the [health care summit](#) between President Obama and members of Congress. While created independently of ongoing health care reform negotiations between the Senate and House, the proposal reflects many of the compromises discussed between the two chambers of Congress. The proposal does not include restrictions on the tax deductibility of charitable gifts.

Senate to Vote on Estate Tax and IRA Charitable Rollover Extension

The House passed legislation (H.R. 4141) on Dec 3, 2009 to permanently extend the estate tax at 2009 levels (\$3.5 million exemption; 45 percent tax rate). Unfortunately, the Senate failed to do the same, and the Estate Tax formally expired on Dec. 31. Similarly while the House passed the Tax Extenders Act of 2009 (H.R. 4213) Dec. 9, the Senate did not produce a similar bill, and thus the Charitable Rollover also expired at the end of the year.

The “American Workers, State, and Business Relief Act of 2010” (HR 4213), which includes a one-year extension of the \$31 billion package of tax extenders, including the IRA Rollover and other charitable giving incentives cleared the Senate on March 3. The Senate anticipates proceeding to a final vote on the legislation the second week in March.

IRS Adjusts Levels for Nominal Value Premiums

The IRS announced the 2010 changes to the value of low cost premiums that charities can provide donors without affecting the tax deductibility of a donor’s gift. A gift is fully deductible

and the charity does not need to provide the fair market value (FMV) of premiums/benefits provided, if:

- The fair market value (FMV) of the benefits received does not exceed the lesser of two percent of the payment/gift or \$96, or
- The donor gave \$48 or more and received a gift or service valued at \$9.60 or less, or
- The donor received small items as part of the appeal that were worth a total of no more than \$9.60

I would encourage all of you to review this information and AHP's response. If you have any questions or comments about this important issue for our profession, please [contact me](#).

Jeannette Conaway

Regional Government Relations Chair
AHP Rockies & Southwest Region

What's Next? A Look at the Emerging Trends in Health Care Philanthropy

AHP has undertaken a year-long study to identify the emerging trends in our profession and to investigate the implications and opportunities for health care philanthropy organizations and development professionals.

The resulting AHP report, "Emerging Trends: The Changing Landscape of Health Care Philanthropy – Redefining the Profession, Donors and Communities," identifies potential futures both in philanthropy and in health care delivery that could impact the role of the development officer, and change our view of donors and the communities we serve.

AHP members can download the AHP Emerging Trends Report for free (please log in first using your AHP username and password). Nonmembers may purchase the report for \$40.

For more information on the valuable tools available to AHP members in the Resource Center, please [contact me](#).

Rebecca Perkins

Regional Communications Chair
AHP Rockies & Southwest Region



A Message from the Communications Director

Thom Sloan
Senior Director
Memorial Hermann Foundation

The AHP Rockies & Southwest Regional Newsletter is your vehicle for pertinent regional information regarding health care philanthropy. It is also a way to share your stories and your ideas with your regional colleagues.

Do you have important ideas on cultivating major gifts? On involving board members? On creating awareness of your organization? What trials have you faced and surmounted in light of the economic recession? What strategies worked? What didn't? How have you used Web 2.0 in your fundraising or volunteer efforts?

The more sharing we do, the more we will all benefit and learn. Help us turn our regional newsletter into an amazing source of both information *and* inspiration.

Our next regional newsletter is scheduled for June. Please [e-mail me](#) your submissions by May.

Many thanks and all the best in your philanthropic endeavours!

Thom Sloan
Regional Communications Chair
AHP Rockies & Southwest Region