

AHP Rockies and Southwest Regional News May 2009



Regional Director's Message

[Barbara C. Larson, CFRE](#)
Regional Director

Change is something we humans tend to resist. Sometimes it just has to be thrust upon us. Yesterday, I heard that two of my colleagues, wonderful AHP volunteers from the southeast region were recently laid off their jobs.

Of course, it didn't take me by surprise. It's happening regularly these days. My own organization has been eliminating positions for the past 6 months with more ahead. In March I also lost my job when 18 middle management positions were cut. For those who are still employed many have told me they will be unable to attend the regional conference due to a need to cut expenses within their organization. For those of you who will be at our regional conference in Nashville, I look forward to seeing you one more time.

If your life is changing - or you wish it would - use the following suggestions from Carol Adrienne, PhD in her book *When Life Changes or You Wish It Would*. It's for anyone who isn't happy with the status quo and wants to take life to the next level. As I'm finding "change can be exhilarating and terrifying - often both at the same time."

- Locate where you are in the cycle of change.
- Move forward after setbacks or losses.
- Recognize and revise limited thinking.
- Attract positive opportunities.
- Discover clues hidden in everyday events.
- Tap into the wisdom of your intuition.
- Affirm your ability to handle whatever happens.

As we move into this new era of healthcare and fundraising, don't forget to use the best resources available to assist you in negotiating change. For me that has always included our Professional Association. AHP has always been proactive in providing resources as evidenced by the new Web site, [Navigating the Recession](#).

Due to my changes, I will be leaving as regional director in June. AHP Board Chair **Lisa Hillman, FAHP**, has asked **Rick Resnik, CFRE**, your regional director-elect, to fill the last months of my term and he has graciously agreed. I look forward to working with Rick this summer as we transition the leadership of the region. Please show him the kindness and support you've extended to me over the past years. I'll miss all the talented people I've come to know within the Rockies & Southwest Region and hope you'll look me up when you make it to Oklahoma. Special thanks to the regional cabinet and conference committees who have supported our region so well.

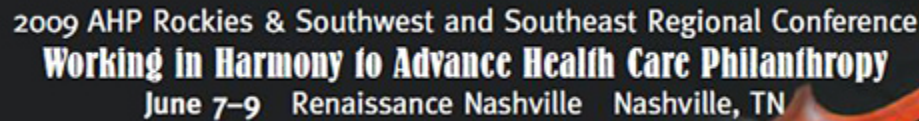
In closing I'll share a Native American proverb: "The Soul would have No Rainbow if the Eyes had No Tears."

Warmest Regards,

Barbara C. Larson, CFRE
Regional Director
AHP Rockies & SW
Akababs1@cox.net

2009 AHP Rockies & Southwest and Southeast Regional Conference

By Charles Scarborough, CFP, CFRE, Regional Conference Chair



2009 AHP Rockies & Southwest and Southeast Regional Conference
Working in Harmony to Advance Health Care Philanthropy
June 7-9 Renaissance Nashville Nashville, TN

Whether your focus is fundraising, leadership, networking or gaining insight into the changing world of health care philanthropy, you can benefit from attending the 2009 AHP Rockies & Southwest and AHP Southeast Regional Conference. Join us at the Renaissance Nashville in Nashville, Tennessee, where you will hear from innovators in current and emerging best practices in health care philanthropy, and connect with others in positions similar to yours to exchange experiences and explore ways to tackle common challenges.

This year's conference, *Working in Harmony to Advance Health Care Philanthropy*, will provide you with the opportunity to learn new and better ways of leading and managing your development office to meet mission-critical needs. Pre-conference seminars will begin the morning of Sunday, June 7, with the full conference program continuing through Tuesday, June 9. The program will follow four key tracks: Back to Basics, Leadership, Best Practices and Special Topics and Major and Planned Giving.

The conference will present the following forums for learning:

Keynote Motivation: Take part in the general sessions to hear trend-setting speakers and their perspective on the industry.

Share Knowledge: Join colleagues for a dynamic discussion at the roundtable session.

Innovative Breakouts: Listen to colleagues lead sessions on best practices in a classroom-style setting.

Connect and Grow: Take advantage of opportunities to network with colleagues at receptions and social gatherings in the evening. Share ideas and have some fun!

Special thanks go to the conference committee for their hard work and professional commitment to hosting a great conference. Committee members included:

AHP Rockies and Southwest Regional
Director
Barbara Larson, CFRE
Regional Director
AHP Rockies & SW

Major and Planned Giving Track Dean
Karen Jensen, CFRE
Vice President and Executive Director
Orlando Regional Healthcare Foundation
Orlando, FL

AHP Southeast Regional Director
Candace C. Burnett, CFRE
President
Huntsville Hospital Foundation
Huntsville, AL

Major and Planned Giving Track Dean
Fred Scarborough, CFRE
Senior Vice President of Major Gifts
Arkansas Children's Hospital Foundation
Little Rock, AR

Conference Co-chair
Richard Kammerer, CFRE
System Executive
Memorial Hermann Foundation
Houston, TX

Newcomer's Reception Co-chair
Paula Higgins
Manager of Annual Giving and Special
Projects
Lakeland Regional Medical Center
Foundation

Conference Co-chair

Jeffrey Lea, FAHP
Senior Vice President for
System Advancement
Appalachian Regional Healthcare System
Boone, NC

Education Co-chair
J. William Kinard Jr., FAHP
Director of Philanthropy and Partnership
GHS Children's Hospital
Greenville, SC

Education Co-chair
Mr. Dana R. Todsens, ACFRE
President
INTEGRIS Health Foundations
Oklahoma City, OK

Back to Basics Track Dean
Jane R. Lanier, CFRE
Senior Vice President and Executive
Director
St. Vincent's HealthCare Foundation Inc.
Jacksonville, FL

Back to Basics Track Dean
Sharon Meyers
Vice President of Major Gifts and Special
Projects
Penrose—St. Francis Health Foundation
Colorado Springs, CO

Leadership Track Dean
Anthony J. Meyer Jr., CFRE
Vice President of Development
Lexington Medical Center Foundation
West Columbia, SC

Leadership Track Dean
Judy Waxman, CFRE
Senior Consultant
The Dini Partners
Austin, TX

Best Practices and
Special Topics Track Dean
Kenneth I. Menefee, FAHP
Executive Director
Lakeland Regional Medical
Center Foundation
Lakeland, FL

Best Practices and Special Topics Track
Dean
Paul Swasko, CFRE
System Director for Philanthropy
and Executive Director Foundation
CHRISTUS Health
Irving, TX

Lakeland, FL

Newcomer's Reception Co-chair
Susan Nutt
Associate Director of Development
University of Texas MD Anderson Cancer
Center
Houston, TX

Opening Reception Co-chair
Amy Dorrill, CFRE
Associate Dean of Development
Emory University School of Nursing
Atlanta, GA

Opening Reception Co-chair
William Smith
Director of Annual and Major Gifts
Baptist Health Foundation
Little Rock, AR

Closing Dinner Co-chair
Melissa Garlington, CFRE
Senior Director
Children's Memorial Hermann Hospital
Houston, TX

Closing Dinner Co-chair
Diane Howard
Division Director of Major Gifts
Palmetto Health Foundation
Columbia, SC

Sponsorship Co-chair
Sharon Jones, CFRE
Vice President of Development
HPC Healthcare, Inc.
Temple Terrace, FL

Sponsorship Co-chair
Charley Scarborough, CFRE
Executive Director and Vice President of
Development
Seton Williamson Foundation
Round Rock, TX

Hospitality Co-chair
Mrs. Laurie Smirl
Executive Director
Jess Parrish Medical Foundation/Parrish
Medical Center
Titusville, FL

Hospitality Co-chair
Amy Cudabac
Development Coordinator
Baptist Health Foundation
2000 Church Street
Nashville, TN 37236

AHP Rockies & Southwest Certified Fundraising Executives (CFREs)

By Julie Johnson Haffner, CFRE, Regional Education/Certification Chair

This month marks a milestone in the life of the CFRE program. Now, due to the diligence of many volunteers on behalf of CFRE International, NCCA, the accrediting arm of the National Organization for Competency Assurance (NOCA), has granted accreditation to the CFRE program.

NCCA grants accreditation to a select group of organizations that demonstrate compliance with the NCCA Standards for the Accreditation of Certification Programs. The accreditation process includes a comprehensive and independent expert analysis of the certification program against the highest industry standards.

"While CFRE International has always adhered to quality standards in certification, accreditation by NCCA serves as an indicator to the nonprofit sector, our donors and other stakeholders that the CFRE is a psychometrically sound and legally defensible certification exam. It is a reliable tool for measuring that a fundraising professional has mastered the set of knowledge, skills and abilities to be an effective fundraiser," said Susan Goepf, chair of CFRE International's board of directors.

To learn more about how you can become a certified fundraising executive, visit the [CFRE Web site](#) or call (703) 820-5555. The process includes a written application and examination and information documentation is required in four categories: education, professional practice, professional performance and service.

We would like to congratulate the following AHP members in the Rockies & Southwest region who have achieved CFRE designation:

Edward Ammon	Karen Kahan
Fayruz M. Benyousef	Richard Kammerer
Richard Boone	Barbara Larson
Mari Bosker	Diane C. LeBlanc
Bryan D. Bowles	Tami L. Loch
April B. Box	James K. McAuley
Kimberly Mathews Britton	Barbara H. McColm
Jay Bruner	Carmen Moyer
Michelle Buchanan	Patrick B. Mulvey
Donna Budak	Janet Neff
Gary Cole	Glen Newhart
Katie B. Cooper	Christi Parker
Glen W. Cospet	James M. Penland
Lee Ann Deal	Cynthia Allen Perkins
John P. Drake	Timothy Plocica
Nanette G. Duhon	Thomas W. Pool
Kenneth W. Eggeman	Laura Quenette
Clark Ellison	Kathie Repola
Katherine L. Friend	Rick Resnik
Aaron Fritz	Jane Robbe Rhodes
Paul D. Fulham	Sherry Rice Rhodes
Roxann Garcia	Janice Samples
Melissa Garlington	Charles Scarborough
Don Garrett, M.S.	Fred Scarborough
Russ Gibbs	Cindy Scott
Debra Gill	Martha St. Romain
Sandra K. Goff	Paul Swasko
Patricia A. Green	Dana R. Todsen
David E. Guyer	Barbara L. Walker
Brian T. Hervey	Judy Waxman
Art Horne	Deborah A. West
John Hyde	Lori Wilems
Julie P. Johnson Haffner	Maureen Wood
Jennifer Johnson	Matthew G. Wright

This list identifies those members who have notified AHP of their certification status. We apologize for any errors or omissions. Please [contact AHP](#) to add your CFRE designation to your member record.

Julie Johnson Haffner, CFRE
 Executive Director
 McKee Medical Center Foundation
 Loveland, CO
Julie.JohnsonHaffner@BannerHealth.com

AHP Legislative Updates

by Paul Swasko, CFRE, Regional Government Relations Chair

Since the recent change in administration, Washington has seen a flurry of legislative activity. As a corollary, AHP has acted on behalf of health care fundraisers in the Rockies and Southwest region and across the nation to promote the introduction and passage of beneficial legislation and to thwart legislation that detrimentally impacts the mission and process of health care philanthropy. You can contribute to these efforts by becoming aware of pending issues of concern, such as those listed below and those continually reported on the [AHP Government Relations Web site](#).

The American Recovery and Reinvestment Act (H.R. 1)

As most of you are probably aware, during February, AHP was actively involved in shaping the 2009

stimulus package in order to safeguard the interests of health care fundraisers. The legislation, as initially introduced in the House (H.R. 1), contained language that eliminated health care fundraisers' access to patient demographic information, and thus threatened grateful patient programs. AHP worked diligently to have this language removed in the Senate version of the bill and the subsequent joint legislation. Consequently, the American Recovery and Reinvestment Act of 2009 signed by President Obama on Tuesday, February 17, did not contain this language.

AHP's success in having this language excluded from the final version of the bill is due in large part to the many AHP members who capitalized upon their Congressional connections and voiced their concerns to their respective representatives and senators as AHP coordinated these contacts with key legislative leaders in both the U.S. House and Senate. Thank you to all of you who recognized the magnitude of this provision and diligently worked with us to inform Congress of its ramifications for health care fundraising, including, most notably, the following AHP Rockies and Southwest members:

**Arlington Memorial/Texas Health Resources
CHRISTUS Health Foundation
The Texas Hospital Association**

While AHP can and does speak as the collective voice of health care fundraisers representing providers of health care to the members of Congress, the voice of their constituency is tantamount. Fortunately, many of you retain strong relations with your hospital's government relations and advocacy teams and with the executive leadership of your hospital. Because of this, AHP was able to efficiently relay information to the appropriate people within your institution and have them in turn, communicate this directly to their Congressional contacts. Connections such as these are invaluable, especially when time is of the essence.

To view AHP's full analysis of the current language of the Bill and its ramifications for health care fundraising or to get details regarding how to acquire stimulus funds, please visit the [government relations section](#) of AHP Web site.

FY2010 Budget Resolution

The House and Senate adopted the budget resolution for fiscal year 2010 ([S. Con. Res 13](#)) on April 29. The final \$3.5 trillion budget proposal retains much of the core priorities of education, health care and energy outlined in President Obama's budget blueprint, but does not include Obama's initial proposal to decrease the value of tax deductions for wealthier Americans.

Additionally, the agreement calls for a two-year extension of the annual package of tax extenders, including the IRA rollover and other charitable giving provisions. These provisions are contingent upon the inclusion of statutory "pay-as-you go" provisions if the proposals are not already funded.

As a concurrent resolution - a special legislative vehicle that applies only to the operations of the House and Senate - the Budget Resolution is not presented to the President for signature and does not have the force of law. Although the Budget Resolution does not require the President's signature, the resolution does provide a blueprint for later congressional action and helps shape legislation that will be sent to the President. For more information regarding the budget and its implications, please visit the [government relations section](#) of the AHP Web site.

IRA Rollover Legislation

While the budget resolution assumes the IRA rollover and other charitable giving incentives will be extended through 2011, Congress must enact the legislation and figure out how to fund it. One such act, The [Public Good IRA Rollover Act of 2009 \(S. 864\)](#) has already been introduced by Senators Byron Dorgan (D-ND) and Olympia Snowe (R-ME) in the Senate. The bill and its companion in the House, ([H.R. 1250](#)), introduced by Representatives Earl Pomeroy (D-ND) and Wally Herger (R-CA), would remove the \$100,000 limit on donations per year, lower the age limit, make all charities eligible to receive donations and provide IRA owners with a planned giving option. The measure would also expand the incentive by removing the current dollar limit on donations per year, making all 501(c)(3) nonprofits eligible to receive donations (including private foundations, donor advised funds, and supporting organizations), and providing IRA owners with a planned giving option starting at age 59½.

Members will recall that on December 23, 2008, President Bush signed into law the Worker, Retiree and Employer Recovery Act of 2008 (H.R. 7327). This legislation included a waiver of the mandatory minimum IRA distribution rule (just for the 2009 calendar year) for individuals who are 70½ and older.

Under current law, people who are 70½ and older are required to distribute a certain amount of funds from their IRA to avoid a stiff tax penalty; however, through this recently enacted law, individuals who are 70½ and older can keep all of their funds in their IRA without receiving a tax penalty.

What is the potential impact on the IRA Rollover Provision?

The temporary waiver of the mandatory minimum distribution rule could detrimentally affect donations under the IRA Rollover provision that allows individuals who are 70½ and older to contribute up to \$100,000 from their IRAs as direct gift to a charity tax-free. The IRA Rollover provision currently is in effect until the end of 2009.

Part of the rationale for enacting the IRA Rollover provision was that individuals could direct their mandatory minimum distributions to charities to diminish the tax implications of those distributions (mandatory minimum distributions from IRAs are treated as taxable income unless they are contributed to charity). However, because individuals 70½ and older will not be required to distribute funds from their IRAs in 2009, charities could see a reduction in IRA gifts.

Charitable Mileage Legislation

In mid-January, a group of bipartisan senators reintroduced the Giving Incentives for Volunteers Everywhere (GIVE) Act to increase the charitable mileage deduction from 14 cents to 40 cents. According to a congressional press release, GIVE would increase the charitable mileage rate for volunteers and charitable organizations to as high as the business mileage deduction but not lower than the deduction for medical and moving expenses. In tandem with Senate action, Representatives John Lewis (D-GA) and Devin Nunes (D-CA) reintroduced their companion legislation in the House, the Fair Deal for Volunteers Act of 2009. Under current law, mileage rates for charitable activities are set by statute and require an act of Congress to be amended.

Charitable Gift Annuity Rates

Responding to the continuing challenging economic climate, the Board of Directors of the American Council on Gift Annuities (ACGA), whose rate recommendations many charities follow, approved the recommendation from their Rates Committee on December 29, 2008 to reduce the return assumptions used in establishing their recommended rates. The new rate schedule reduces recommended rates by 0.4% to 0.7%, with the maximum rate for ages 90 and above at 9.5%. The new recommended rates went into effect for gift annuities issued on February 1, 2009.

Membership Report

By Richard Boone, CFRE, Regional Membership Chair

AHP Rockies & Southwest Region
April 2009 Membership Report

519 total Regional Members
19 additions
25 membership deletions
-6 net loss of members for the month

Thank you for sending prospect information so we may encourage and recruit new membership.

Richard Boone, CFRE
President
St. John Medical Center Foundation
Tulsa, OK
rboone@sjmc.org

Your 2008-2009 AHP Rockies & Southwest Region Cabinet

Please feel free to contact your 2008-2009 AHP Rockies & Southwest Cabinet members with questions and/or suggestions so that we can best represent you and your needs.

Director

Barbara Larson, CFRE

2801 Jocluns Trail
Edmond, OK 73013
Phone: (405) 285-8939
Email: akababs1@cox.net

Education/Certification Chair

Julie Johnson Haffner, CFRE

Executive Director
McKee Medical Center Foundation
P.O. Box 830
Loveland, CO 80539
Work Phone: (970) 635-4106
Fax: (970) 593-6065
Email: Julie.JohnsonHaffner@BannerHealth.com

Government Relations Chair

Paul Swasko, LMSW-ACP

Foundation, Executive Director
Christus Health
6363 N Hwy 161, Suite 450
Irving, TX 75038
Work Phone: (214) 492-8500
Fax: (214) 492-8543
Email: paul.swasko@christushealth.org

Past Director/Nominating Chair

Lisa Kennedy, CFRE

Vice President for Development
Baylor College of Medicine
One Baylor Plaza - MS: BCM 160
Houston, TX 77030
Work Phone: (713) 798-7552
Fax: (713) 798-3344
Email: lkennedy@bcm.tmc.edu

Resource Information Center/Communications

Rebecca Perkins

Director of Development Communications
INTEGRIS Foundations
3030 Northwest Expressway, Suite 1600
Oklahoma City, OK 73112
Work Phone: (405) 951-5027
Fax: (405) 951-5035
Email: rebecca.perkins@integris-health.com

State Representative

William C. Rogers

Executive Director, CDO
Washington Regional Foundation
PO Box 356
Fayetteville, AR 72702
Work Phone: (479) 444-9888
Fax: (479) 713-1884
Email: brogers@wregional.com

State Representative

Hazel Tull-Leach

Director Elect

Rick Resnik, CFRE

Vice President
The Seton Fund
1201 W 38th St
Austin, TX 78705
Work Phone: (512) 324-1990
Fax: (512) 324-1989
Email: rresnik@seton.org

AHP Foundation Chair

Membership

Richard Boone, CFRE

President
St. John Medical Center Foundation
1923 S. Utica Ave.
Tulsa, OK 74104
Work Phone: (918) 744-2186
Fax: (918) 744-2716
Email: rboone@sjmc.org

Regional Conference Chair

Charles Scarborough, CFRE

Executive Director
The Seton Fund
201 Seton Pkwy
Round Rock, TX 78665
Work Phone: (512) 324-4060
Fax: (512) 324-1989
Email: cscarborough@seton.org

Secretary

Sandy Ogletree

Executive Director
University Medical Center
602 Indiana Ave
Lubbock, TX 79415
Work Phone: (806) 775-8250
Fax: (806) 775-8280
Email: sandy.ogletree@umchealthsystem.com

State Representative

Tanya Downing

Director of Corporate & Community Campaign
Presbyterian Healthcare Foundation
8440 Walnut Hill Lane, Suite 800 LB6
Dallas, TX 75231
Work Phone: (214) 345-5044
Fax: (214) 345-6093
Email: tanyadowning@texashealth.org

State Representative

Jan Samples, CFRE

Director of Grants and Research
INTEGRIS Foundations
3030 Northwest Expressway, Suite 1600

*Executive Director, Development
University of New Mexico Children's Hosp.
Two Woodward Place, Suite 100
700 Lomas Blvd NE
Albuquerque, NM 87102
Work Phone: (505) 277-5685
Fax: (505) 277-5687
Email: hazelnut@salud.unm.edu*

State Representative

Donna Budak, CFRE

*Director of Dev. and Planned Giving
Children's Medical Center Foundation of Central Texas
1206 W. 38th St., Suite 4101
Austin, TX 78705
Work Phone: (512) 324-3409
Fax: (512) 324-3232
Email: dbudak@seton.org*

Oklahoma City, OK 73112
Work Phone: (405) 951-5016
Fax: (405) 951-5035
Email: jan.samples@integris-health.com

At Large Member

Dana Todsén, ACFRE

*President
INTEGRIS Foundations
3030 Northwest Expressway, Suite 1600
Oklahoma City, OK 73112
Work Phone: (405) 951-5007
Fax: (405) 951-5035
Email: dana.todsén@integris-health.com*

At Large Member

John Drake, CFRE

*President
Irving Healthcare Foundation
1901 N. MacArthur Blvd
Irving, TX 75061
Work Phone: (972) 579-4391
Fax: (972) 579-4399
Email: johndr@baylorhealth.edu*