



SEPTEMBER EDITION

Greater Dallas Chapter

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Chapter Administrator

The JoDe Group

Association of Fundraising Professionals Greater Dallas Chapter

Next Chapter Event: Wednesday, October 24th

Megatrends Affecting Planned Giving

Speaker: Cynthia Krause

Our work is being shaped by the confluence of existing and emerging mega trends which are dramatically affecting the way we work, our alliances, and the donors, prospects and charities we serve. Our ability to understand these trends and adjust our thinking and acting will spell the difference between success and failure in the future. This presentation will explore the impact of four megatrends on the charitable gift planning industry. It will also offer insights from dozens of seasoned gift planners regarding where we've been, where we are and how we must successfully adapt to these megatrends to enjoy success – now and in the future - in our gift-planning programs.

Cynthia W. Krause of Dallas, Texas, has worked in the field of charitable gift planning with nonprofit organizations, individuals, families and family foundations for over 20 years. She is currently President of Wilson & Krause, a philanthropic and family advisory services firm where she has served or consulted with over 50 nonprofits and foundations across the country. She has also served as the Director of the Dallas office of IFF Advisors, LLC, a national consulting firm specializing in work with affluent families and family foundations, Vice President and Senior Trust Counsel for Baylor Health Care System Foundation where she provided leadership to its charitable estate planning division, and Associate Trust Counsel for Baptist Foundation of Texas where she worked with over 35 charitable organizations and their donors in structuring and establishing planned gifts.

conference chair for the 12th National Conference on Planned Giving, past president of the North Texas chapter of NCPG, and a former member of the editorial advisory boards of the publications *Planned Giving Today* and *Planned Giving Mentor*. Krause also has extensive experience integrating the theories of psychological type utilizing the Myers-Briggs Type Indicator® in her work with individuals, families and organizations and is a qualified administrator of the MBTI®.

Krause is a graduate of Baylor University (B.A., 1979) and Baylor University School of Law (J.D., 1981), and is a nationally recognized speaker and author in the areas of charitable gift planning, charitable gift and estate tax law and women and philanthropy. Additionally, she has served on numerous boards and foundations.

[Register today at www.afpdallas.org](http://www.afpdallas.org)

Wednesday, October 24th
11:30-1:00
Members \$25 / Nonmembers \$40

While you are visiting the site don't forget to register for National Philanthropy Day 2007

All reservations must be received by 10/18

Krause is currently on the faculty of The College of William & Mary National Planned Giving Institute and is a member of the Editorial Board of the *Planned Giving Design Center*. She is a former member of the board of directors of the National Committee on Planned Giving, past



Santa Claus and the Dallas County Community College District (DCCCD) have some things in common. They are both big. And one man had a lot to do with the success of each one.

You probably already know that Big Tex started life as a huge Santa Claus figure, brought to Dallas in 1949 and reinvented as the enduring emblem of the State Fair. The DCCCD was created in 1965 and has grown from a few thousand students at El Centro College to more than 64,000 credit students and 25,000 continuing education students in seven colleges and around the world through distance education.



Santa Claus, Big Tex, and the DCCCD? **R.L. Thornton, Jr.**

Mr. Thornton paid \$750 for Big Tex while serving as president of the State Fair of Texas. He helped to lead the first bond campaign for the DCCCD as chair of the Board of Trustees. (And along the way was Mayor of Dallas and founded Mercantile National Bank among a dozen other achievements—and you drive freeways named after him every month.)



Big Tex has gone on to greater things including booming a hearty "Howdy, Ya'll" to fair goers and the DCCCD has become a national leader in community colleges.

The thing in common? The capacity of an innovator to redefine and reformulate problems by asking new questions—that led to solutions that were not time or place-bound, that had the potential for change and growth.

In *The Myths of Innovation*, author Scott Berkun offers more insights into the nature of innovation:

"Epiphanies" or "magic moments" are really the culmination of dozens of smaller observations, inquiries, mistakes and comedies that occurred to make the "Eureka" possible.

Finding support for a big new idea depends on abilities -- like persuasive skills and emotional endurance -- that have nothing to do with intellectual prowess or creative ability.

People who earn the label "creative" are really just people who come up with more combinations of other ideas, find interesting ones faster, and are more willing to try them out.

Innovation is a practice, a set of get-out-there-and-try-it habits, not fantasizing in an ivory tower.

Change and growth is a common theme for the Association of Fundraising Professionals as well, nationally and locally. A new governance structure is now in place for the international association with a smaller board and a presidents' council that advises that board. You will be asked to approve new bylaws reflecting those changes and others creating greater consistency among chapters in the early part of next year.

Your Greater Dallas Chapter has just reached a record membership of 413 members, a 35 percent growth rate this year which shows no signs of slowing down. We've had a very successful



**2006
Ten Star AFP Chapter**

International Conference here, the DFW Philanthropy conference posted record numbers, and our first offering of the First Course had 36 participants. We've been averaging over 100 members at each monthly meeting and have offered several major workshops this year, rivaling the quality of international conference sessions. National Philanthropy Day is on track to again be a superb event and in addition to long term support from the Communities Foundation of Texas; we have our first multi-year sponsorships in place. None of it would be possible without the dedicated work and gifts of time and expertise of our board members and numerous volunteers on major committees.

Continuing to provide high quality programs, responsive service, and efficient and effective management as we have grown larger and more complex is a challenge--one that must be met with solutions that have potential for growth and change.

After much consideration, your AFP Board has engaged a new management company for the chapter. Madeleine Crouch and Company will begin administrative services for the Greater Dallas Chapter on November 1, 2007. The company has an extensive track record with nonprofit groups and an excellent reputation here in Dallas as well as nationally.

Dena Culpepper, owner of the JoDe Group that has provided management services for us for the past year and who served as chapter administrator, part-time, for several years before that change, is working with the Crouch team in the transition and will continue through the National Philanthropy Day event. Part of our success as a chapter and our growth is due to Dena's work with us during her tenure.

Please join us in thanking Dena for her service, her cooperative spirit, and her genuine care for our members. We wish her well with new ventures she is undertaking.

In other board news, as approved by the membership in our meeting on September 26th, Lesly Annen has become the Vice President for Professional Advancement, filling the post that Jana Sharpley served so well before her departure to Washington University in St. Louis. Paula Voyles has also rejoined the board to serve as Vice President for Administration completing the term of Charles Carrington who has had to step down due to increased work responsibilities. Thank you to all these professionals for their contributions.

Things to do this month: Go to www.afpdallas.org to reserve your place for National Philanthropy Day, November 9 and register for the October 24th meeting featuring nationally recognized speaker Cynthia Krause on "*Megatrends Affecting Planned Giving*".

And in case you need to know and if the State Fair of Texas is also in your plans this month, there's a website for locating the fried food!
www.bigtex.com/foodlocator

Saluting innovation, growth, and change--corny dog in hand—

Mary

CHAMBERLAIN SCHOLARSHIP

\$500 Scholarship for Registration Fees for the 2008 International Conference, San Diego, California

If you have never attended an AFP/NSFRE International Conference and are employed full time as a fundraising professional (or as an executive with substantial fundraising responsibilities) you are eligible to apply for the Chamberlain Scholarship. The scholarship will defray all but \$10 of the amount for registration. One AFP-Greater Dallas Chapter member will be selected.

Please complete the application found on page 10 of the newsletter and return it by e-mail to mbrumbach@dcccd.edu by October 24, 2007. The signed form may be faxed to 972-860-4897 or delivered in person at the October 24th meeting of AFP.



National Philanthropy Day®

"All the great things are simple, and many can be expressed in a single word: freedom, justice, honor, duty, mercy, hope."

The five words mentioned by Winston Churchill cover so many of our everyday endeavors as fundraisers – almost all of our mission statements serve one of those fine words. As those of us in the fundraising profession recognize those who enable us to achieve success in our missions, we invite you all to join us in honoring the generosity of spirit personified by our honorees.

Take the time to say thank-you in this most meaningful way to philanthropists and professionals.

November 9th – National Philanthropy Day – BUY A TICKET OR A TABLE to join your AFP colleagues in this inspirational event! Log on to www.afpdallas.org to view the complete NPD press release and to register for this event.

The AFP Greater Dallas Chapter would like to thank our National Philanthropy Day sponsors~



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The Dallas Morning News
dallasnews.com

2008: The Year of CFRE!

If you are a fundraising professional with five years experience, you are eligible to apply for professional certification. In the fundraising profession, that is Certified Fund Raising Executive (CFRE), offered by CFRE International. CFRE International offers the only internationally recognized baseline professional credential for philanthropic fundraising executives.

Why certify? Good question. Every organization needs a "Top 10 List", so here's ours:

Top 10 Reasons to Become CFRE Certified

Certification grants you more credibility. CFRE certification serves as an impartial, third-party endorsement of your knowledge and experience against international standards in philanthropy. It adds to your credibility as a fundraiser and sets you apart from other professionals.

Certification can improve career opportunities and advancement. CFRE certification can give you the "edge" when being considered for a promotion or other career opportunities. CFRE certification clearly identifies you as an employee who has demonstrated mastery of fundraising principles and techniques based on accepted best practices.

Certification prepares you for greater on-the-job responsibilities. CFRE certification is a clear indicator of your willingness to invest in your own professional development. Certified professionals are aware of the constantly changing environment around their profession and possess the desire to anticipate and respond to change.

Certification improves skills and knowledge. Typically, achieving CFRE certification requires training, study and "keeping up" with changes. CFRE certification showcases your individual mastery by confirming proficiency and knowledge in the field. CFRE certification also requires recertification every three years, proving you stay ahead of the curve in fundraising.

Certification may provide for greater earnings potential. Many fundraising professionals who have become CFRE certificants experience salary and wage increases based on their certification status. Studies show that on average CFRE certificants earn 17% more than their non-certified counterparts. In addition, CFRE certificants are in high demand internationally.

Certification demonstrates your commitment to the fundraising profession. Receiving CFRE certification shows your peers, supervisors and, in turn, donors your commitment to your chosen career and your ability to perform to set standards.

Certification enhances the profession's image. CFRE certification program seeks to grow, promote and develop certified professionals, who can stand "out in front" as role models in the fundraising field.

Certification reflects achievement. CFRE certification is a reflection of personal achievement because the individual has displayed mastery of his or her field by meeting requirements and standards set in philanthropy.

Enriches Self Esteem. CFRE certification is a step toward defining yourself beyond a job description or academic degree while gaining a sense of personal satisfaction.

Certification offers greater recognition from peers. As a CFRE certificant, you can expect increased recognition from your peers for taking that extra step in your professional career.

And, if you need one more:

In the U.S., Certified Fund Raising Executives (CFRE) earn 17% more than their non-certified colleagues. The average salary of CFRE certificants in the United States is \$85,032.

Can you hear me now? Interested? Want to know how to begin? Well, for starters, go to the CFRE website, www.cfre.org, and look around. There's a lot to see and it is pretty easy to maneuver and understand. You might want to click on Apply Now, then click on Get Started Now! You can set up your own account and start the application process. It doesn't cost you anything until you are ready to submit your application.

The reason 2008 is the Year of CFRE is that the Fort Worth and Greater Dallas AFP Chapters are hosting the CFRE Review Course, June 11-12, 2008 at the Arlington Convention Center in conjunction with the DFW Philanthropy Conference on June 13.

AFP's CFRE Review Course is a 2-day, intensive educational opportunity which provides an overview of skills, techniques, and program components based on fundraising experience at the five-year level. Its content is based on the domains covered in the CFRE Examination. Each module in the CFRE Review Course is taught by a senior level professional with CFRE credentials.

In this course you will learn key concepts that fundraising professionals should know after five years of experience in the field. If you are working toward your CFRE, taking this course will assist you in learning or reviewing concepts covered in the CFRE exam as detailed in the Test Content Outline provided by CFRE International. If you are taking the course to learn new concepts and skills, the course will allow you to review what you already know and build on that knowledge.

Want to know more? The next thing you need to do is contact Fran Lobpries at fran.lobpries@thewomensmuseum.org. She is the official CFRE guru for the Greater Dallas AFP Chapter. Ask her any questions you have and tell her to put you on the list for any CFRE updates. If you are eligible, she will put you on a time-line to complete the CFRE application process in time to take the CFRE Review Course in June 2008, and qualify to take the exam in 2008 or 2009. What are you waiting for? Contact Fran now at fran.lobpries@thewomensmuseum.org or call her at 214.915.0878. Don't delay...be the next CFRE of the Greater Dallas AFP Chapter.

Manage Your Energy, Not Your Time

Key ideas from the [Harvard Business Review](#) article by Tony Schwartz, Catherine McCarthy

The Idea in Brief

Organizations are demanding ever-higher performance from their workforces. People are trying to comply, but the usual method--putting in longer hours--has backfired. They're getting exhausted, disengaged, and sick. And they're defecting to healthier job environments.

Longer days at the office don't work because time is a limited resource. But personal energy is renewable, say Schwartz and McCarthy. By fostering deceptively simple **rituals** that help employees regularly replenish their energy, organizations build workers' physical, emotional, and mental resilience. These rituals include taking brief breaks at specific intervals, expressing appreciation to others, reducing interruptions, and spending more time on activities people do best and enjoy most.

Help your employees systematically rejuvenate their personal energy, and the benefits go straight to your bottom line. Take Wachovia Bank: Participants in an energy renewal program produced 13 percentage points greater year-to-year in revenues from loans than a control group did. And they exceeded the control group's gains in revenues from deposits by 20 percentage points.

The Idea in Practice

Schwartz and McCarthy recommend these practices for renewing four dimensions of personal energy:

Physical Energy

- Enhance your sleep by setting an earlier bedtime and reducing alcohol use.
 - Reduce stress by engaging in cardiovascular activity at least three times a week and strength training at least once.
 - Eat small meals and light snacks every three hours.
 - Learn to notice signs of imminent energy flagging, including restlessness, yawning, hunger, and difficulty concentrating.
- Take brief but regular breaks, away from your desk, at 90- to 120-minute intervals throughout the day.**

Emotional Energy

- Defuse negative emotions--irritability, impatience, anxiety, insecurity--through deep abdominal breathing.
- Fuel positive emotions in yourself and others by regularly expressing appreciation to others in detailed, specific terms through notes, e-mails, calls, or conversations.

Look at upsetting situations through new lenses. Adopt a "reverse lens" to ask, "What would the other person in this conflict say, and how might he be right?" Use a "long lens" to ask, "How will I likely view this situation in six months?" Employ a "wide lens" to ask, "How can I grow and learn from this situation?"

Mental Energy

- Reduce interruptions by performing high-concentration tasks away from phones and e-mail.
- Respond to voice mails and e-mails at designated times during the day.

Every night, identify the most important challenge for the next day. Then make it your first priority when you arrive at work in the morning.

Spiritual Energy

- Identify your "sweet spot" activities--those that give you feelings of effectiveness, effortless absorption, and fulfillment. Find ways to do more of these. One executive who hated doing sales reports delegated them to someone who loved that activity.
- Allocate time and energy to what you consider most important. For example, spend the last 20 minutes of your evening commute relaxing, so you can connect with your family once you're home.

Live your core values. For instance, if consideration is important to you but you're perpetually late for meetings, practice intentionally showing up five minutes early for meetings.

How Companies Can Help

To support energy renewal rituals in your firm:

- Build "renewal rooms" where people can go to relax and refuel.
- Subsidize gym memberships.
- Encourage managers to gather employees for midday workouts.
- Suggest that people stop checking e-mails during meetings.
- [Purchase the full-length Harvard Business Review article here.](#)
- [Visit Harvard Business Online.](#)
- [See more on Leadership & Managing People at HBR Online.](#)

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About the Authors

Tony Schwartz (tony@theenergyproject.com) is the president and founder of the Energy Project in New York City, and a coauthor of *The Power of Full Engagement: Managing Energy, Not Time, Is the Key to High Performance and Personal Renewal* (Free Press, 2003).

Catherine McCarthy (catherine@theenergyproject.com) is a senior vice president at the Energy Project.

Please help us welcome our newest chapter members...

T.W. Hudson Akin

Ashley Bradley

Kelly Braswell

Steve Rowan

Every Member Campaign 2007

Have you made your 2007 Every Member Campaign pledge yet? If not please **STOP** and do it today! Simply log on to www.afpnet.org or contact Sue Bailey at sbailey@trinitychristian.org to make a donation over the phone. Our chapter has a goal of \$7,400 and thanks to the help of board, who have reached 100% participation, and our members we plan on meeting that goal before December 31st!

Contributions to the AFP Foundation for Philanthropy's "Every Member Campaign" support philanthropic diversity, educational initiatives, research, public awareness and AFP strategic initiatives that advance ethical and effective fundraising.

In making a gift, you will be helping to provide access to training for fundraisers who will be taught professional and ethical fundraising techniques. Together our efforts will help insure that these fundraisers have the tools they need to make a difference in their communities. Gifts to this campaign are tax deductible to the extent provided by law.



Mark your calendar now for the 2008 AFP DFW Philanthropy Conference

Philanthropy Conference on Friday, June 13, 2008 at the Arlington Convention Center! Planning has already begun, but we still need help to make this annual conference the best it can be. If you would like to serve on the planning committee, please contact Kristie Gibson 2008 Conference Chair at

kristiegibson@tafb.org or Robin Johnson-Piper, Conference Co-chair, at rjohnsonpiper@twu.edu

The next meeting will be in early October. We hope to see you there!

AFP Greater Dallas Chapter
2008 AFP Foundation Chamberlain Scholarship Program

Deadline for applications: October 24, 2007

Return to: Dr. Mary A. Brumbach, AFP-GDC President

e-mail: mbrumbach@dcccd.edu fax: 972-860-4897 (BE SURE TO USE COVER SHEET ADDRESSED TO DR. BRUMBACH)

in person: October 24, 2007 AFP Meeting

Personal Data

Applicant's Name _____

Are you a member of AFP _____

Job Title/ Employer _____

Business Address _____

City _____ State _____ Zip _____

Business Phone Number (_____) _____ Home (_____) _____

Email Address _____ Website URL _____

How long have you been responsible for fundraising with your present organization?
_____ Years _____ Months

Supervisor's Signature _____

(or signature of an Executive Committee member on your organization's board)

Phone Number _____

Background Information

Years in the Profession _____

Previous Training in Fundraising _____

(Please specify courses, seminars, conferences attended)

Professional Reference _____

(Other than present employer)

Phone _____

I am employed as a full-time fundraising professional or spend at least fifty percent of my time fundraising for my employer. I have never attended an NSFRE/AFP International Conference on Fundraising and understand that only one individual from my local organization can be selected.

(Applicant's Signature)

(Date)

What I expect to gain from participation in the AFP International Conference that will benefit my organization:

Job Listing Service

If your organization has a position that they would like listed in next month's e-newsletter please supply the brief job description via e-mail no later than the 1st day of the month to

afpchapteroffice@afpdallas.org

(The position will be listed for one month only.)

Job Listings

Citizens Development Center seeks a Director of Development to lead fund development and marketing programs to support the agency budget and long range goals. The ideal candidate will have three or more years of progressive experience in revenue development, fundraising events and/or marketing in a non-profit environment, including at least two years of experience working at a senior or supervisory level. Individual must have strong verbal and written communication skills. Knowledge of Dallas donor community a plus. Competitive salary and benefit package. Please visit our website at www.cdcdallas.org to learn more about the lives we are changing.

You may submit your resume with salary requirements to djones@cdcdallas.org.

Coming soon....

November 9 **NPD at the Hilton Anatole.**

December 12 **Holiday Luncheon**

To register for any of these events, simply log on to www.afpdallas.org