

CELEBRATE PHILANTHROPY IN A WHOLE NEW LIGHT

On November 6 at the annual National Philanthropy Day Celebration, AFPGV and the event's presenting sponsor, Manning & Napier, will proudly recognize award winners in eight different categories from around the greater Rochester area. The event will be held at the Joseph A. Floreano Rochester Riverside Convention Center and more than 500 people are expected to attend in celebration of the award winners and the philanthropic spirit of the Rochester Community.

The follow awards will be presented at the luncheon:

- Outstanding Corporation: **Constellation Brands**
- Outstanding Foundation: **Golisano Foundation**
- Robert A. Clinger Outstanding Fundraising Professional: **Steven S. Smith, CFRE**
- Outstanding Philanthropist: **Jurij and Marie Kushner**
- Outstanding Volunteer Fundraiser: **R. Carlos Carballada**
- Outstanding Youth Volunteer Fundraiser – Group: **McQuaid Jesuit High School Crew Team – “Row for Hope”**
- Outstanding Youth Volunteer Fundraiser – Individual: **Kyle Stein**
- Multi-Generational Award: **Flaum Family**

The luncheon is from noon until 1:30 p.m. Registration begins at 11:15 a.m. Tickets are \$55 for individual AFP members, \$65 for non-members, and \$500 for a table of 10.

Tickets are available online at afpgv.org or by sending registrations and checks by October 27 to: AFP, Genesee Valley Chapter, PO Box 425, Spencerport, NY 14559. Credit card reservations may be made by phone (585-586-7810), fax (888-366-9196) or mail. ☎

AFPGV CHAPTER SCHOLARSHIPS

Thank you to everyone who applied for one of our AFPGV chapter scholarships this fall. We received an impressive number of applications from many qualified candidates. Congratulations to our newest scholarship winners:

The Williams Diversity Scholarship for AFP Membership: *Alyssa Whitfield, Dress for Success Rochester*

The Karen M. Gaffney Scholarship for AFP Membership: *Holly Dutcher, CURE Childhood Cancer and Tracey Lewis, Big Brothers Big Sisters*

The Chamberlain Scholarship for AFP's 2016 International Conference in Boston, Massachusetts: *Beth Herschel, Ad Council of Rochester*

Our next scholarship opportunities will be available early next year:

The Jill Pranger Scholarship Fund for CFRE Certification and
The Meyers Scholarship for the AFPGV Regional Conference.

Visit afpgv.org/scholarships for more details. ☎

PRESIDENT'S NOTE: MELANIE BARNAS-SIMMONS

As we near the end of the year and the end of my term as AFPGV President, I want to take this opportunity to thank the many volunteers who have touched my life. Our members are busy working professionals with families, commitments and responsibilities. Still so many of you find the time to give back to your profession through a volunteer role with AFPGV. Whether you serve on a committee to select scholarship recipients, help plan one of our major events, or serve as a board member leading our chapter to the next level of excellence, you are the backbone of AFPGV.



I can't thank our volunteers enough for their time, talent, and treasure they share with us every day. From young members eager to learn and network, to our seasoned professionals hungry to share their knowledge and mentor the next generation; we are strong, unified and making an amazing impact on the philanthropy in our community. I am proud to be associated with such a high caliber group of professionals! ☎

**Association of Fundraising Professionals
– Genesee Valley Chapter**

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Chapter & Verse newsletter

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AGE MATTERS: THE MULTI-GENERATIONAL GIVING OPPORTUNITY

By Jared Longmore

Over the next four decades, approximately \$41 trillion in assets will transfer from the Matures (b. 1946 and earlier) and Baby Boomers (b. 1946 – 1964) to the populations known as Gen X (1965 – 1979) and Millennials (b. 1980 – 2000). Take a moment to consider that figure – *that's 41 followed by 12 zeroes.*

"The Great Wealth Transfer," as it's come to be commonly known, means that Gen X and Millennials will wield the greatest economic and philanthropic power of any previous generations.

The fundraising practice that relates to this phenomenon is known as multi-generational giving. To learn more about this important topic, I sat down with James Ebenhoch, Endowment/Foundation Consultant at Manning & Napier.

In order to assist Manning & Napier's non-profit, endowment and foundation clients, Ebenhoch has focused some of his efforts on multi-generational giving. Multi-generational giving is complex because at its core are two principles – one that focuses on the individuality of the generations, and one that reviews the practice of transferring wealth within the family unit.

According to Ebenhoch, the best way to think of multi-generational giving is that it "inspires and enables the next generation of donors to continue a legacy of giving established by their parents and grandparents."

Developing a multi-generational giving strategy begins by understanding the basic differences between the world's living

generations. Let's begin with the two generations that donate the most to non-profits today – the Matures and the Baby Boomers.

Matures grew up in an age of political and economic uncertainty, including the Great Depression and World War II. Their experiences lead them to be more conserva-

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tive and loyal, and they are sometimes noted for their adherence to rules.

Baby Boomers, on the other hand, were brought up in a booming post-war economy. While they inherited many of the Matures' values, growing up with privilege led this generation to feel more special and be more optimistic than previous generations.

These two generations represent nearly 70% of all charitable giving today, and are often associated with responding best to traditional fundraising methods like direct mail campaigns. As a result, they have become the lifeblood of most non-profit development strategies.

Gen X and **Millennials** are a completely different story. Unlike previous generations, they were raised in a consumer-driven

economy, are more independent, and because of technological advances, feel more connected to the world. For both these generations, technology has changed the way they consume products and participate in charitable giving.

Ebenhoch cautions that the strategies that worked well for previous generations will need to be tailored for members of Gen X and Millennials. He offers three straightforward recommendations for non-profits looking to get ahead of the curve.

First, non-profits should use targeted messaging and delivery methods for each generation. Gone are the days where a one-size-fits-all approach to direct mail or email campaigns can be fully successful. Many non-profits already segment by the level of donor, but segmenting by age bracket can also help fundraisers appeal to the specific topics and sensitivities that drive more recent generations.

Non-profits can also prepare for the future by incorporating technology into their giving platforms. According to research conducted in 2014 by the Pew Research Institute, more than 97% of Millennials and Gen Xers own cell phones, and more than 63% use their phones to go online.

This research points to a changing paradigm in the way donors use their phones. According to Ebenhoch, mobile giving strategies are crucial to attracting younger donors. He points out that "Gen X and Millennials will accept a direct mail appeal and won't view it as intrusive, but would much rather use newer technology to receive an appeal."

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MULTI-GENERATIONAL GIVING (CONTINUED)

Second, address the entire family unit instead of a particular member or generation. This is especially important when dealing with high-wealth families. At Manning & Napier, their Family Wealth Management Group often works with multiple generations to better understand their long-term philanthropic goals. This sort of goal-setting is fluid, but always circles back to family values. “Values drive the next generation of major donors, not valuables,” states Ebenhoch. “And, children learn those values from their grandparents and parents.”

Today’s major philanthropists are very interested in providing their children with hands-on learning activities. These can be simple, like having children go on facility tours and reporting back to the family unit, or more complex—such as having these newer generations help to manage a foundation or donor-advised fund.

Third, non-profits should feel comfortable asking their donors for feedback. The benefits can be numerous. Ongoing donor surveys can help non-profits understand how they are perceived in the community, collect information and grow their database, maximize efficiencies in information delivery, and build stronger relationships between donor and organization.

While adopting multi-generational giving strategies will be easier for some organizations than others, it’s important to view “The Great Wealth Transfer” as an opportunity for your non-profit to clarify its mission and vision, build meaningful 1:1 relationships with donors, and maximize efficiencies by thoughtfully using technology.

At the end of the day, multi-generational giving is about removing barriers to giving and planning for the future – two things that all non-profits should care about. ☞

Note from the author:

If you would like to learn more about the services Manning & Napier provides to its endowment, foundation, and non-profit clients, please contact info@manning-napier.com.

AFPGV BOARD APPROVES DIVERSITY STATEMENT

At the September, 2015 AFPGV Board Meeting, the Board of Directors unanimously approved the following definition of diversity for the chapter and philosophy on diversity and inclusion. AFPGV is committed to ensuring that diversity and inclusion are encompassed in all of our chapter’s activities.

AFPGV Diversity and Inclusion Philosophy Statement

AFPGV believes that diversity and inclusion create a strong, vital and unified force for the effective pursuit of an organization’s mission and achieving philanthropic success.

AFPGV Definition

Diversity and Inclusion in Fundraising—seeks to achieve a broad representation of experiences, perspectives, and cultures to ensure that the best possible thinking, ideas, opportunities, and solutions are considered; intentionally creates a respectful and welcoming environment that is open to all; and appreciated the unique contributions of every member of the community. ☞

Upcoming Events

Friday, October 16, 2015

Capital Campaigns Networking Group:
Breakfast at Panera Bread
Twelve Corners, Brighton

Tuesday, October 20, 2015

AFPGV Breakfast Program at
Locust Hill Country Club
Topic: Managing the Ask... Essential Steps
When Soliciting Major Donors
Speaker: Diane M. Carlson, CEO of 1-2-1
Philanthropic Services
New Member Orientation

Wednesday, October 28, 2015

Autumn Member Meet & Greet:
Victoire Belgian Beer Bar
120 East Avenue, Rochester

Wednesday, November 4, 2015

Solo Shops Networking Group:
Topic: What I’m doing by year’s end to
make 2015 a success
Brown Bag Lunch at United Way

Friday, November 6, 2015

National Philanthropy Day Luncheon

Wednesday, November 18, 2015

AFP Webinar at University of Rochester:
How to Elevate Your Small Shop
Fundraising Program

Friday, November 20, 2015

Capital Campaigns Networking Group:
Breakfast at Panera Bread
Twelve Corners, Brighton

Thursday, December 3, 2015

AFPGV Annual Meeting & Holiday Party:
Hose 22 Firehouse Grill
56 Stutson Street, Rochester

Thursday, December 10, 2015

AFP Webinar at University of Rochester:
The Whats, Hows and Whys of Major
Gift Solicitation

Friday, December 18, 2015

Capital Campaigns Networking Group:
Breakfast at Panera Bread
Twelve Corners, Brighton

To see the full listing of the year’s events,
please visit afpgv.org. ☞

MEMBERSHIP NEWS

Welcoming new members!

Erin Adcock, BA

Director of Grant Administration at
Girl Scouts of Western New York

Rachel Baker August

President/Owner at
Baker August Consulting

Lauren Bevacqua

Special Events Coordinator at
Mary Cariola Children's Center

Terry Fingar

Development & Community Relations
Officer at The Living Well

Lauren Spiker

Executive Director at
13 Thirty Cancer Connect, Inc.

Susan J. Sullivan, MA

Director of Development at the
Charles Finney School

Taryn Windheim

VP of Advancement at Yates Arc

Heidi Woods, BA

Lifetime Assistance

Joint Session offered by AFP Genesee Valley Chapter and the Estate Planning Council (EPC)

The Gift, The Giver and The Gift Planning Team January 26, 2016 – Breakfast Program

- Learn how to build teamwork among professional advisors and fundraising professionals to achieve the best possible outcomes for donors
- Overview of tax-effective charitable giving strategies
- Other considerations: non-monetary benefits of charitable planning

Panelists include:

MARK E. KLUGE, CLU®, CAP®, Partner
BlueMark Advisors

DON H. TWIETMEYER, ESQ., CPA., Partner
Trevett Cristo Salzer & Andolina P.C.

MARIANNE M. VIRGILIO, CFRE, Director of University Advancement
University of Rochester Office of Gift Planning

JOEL F. WEISS, Senior Vice President of Advancement
Jewish Senior Life Foundation

To learn more and to register visit afpgv.org.

Chapter Leadership

OFFICERS

President:
Melanie Barnas-Simmons

President Elect and Treasurer:
Anne McKenna, CFRE

VP of Marketing:
Tiffany Paine-Cirincione

VP of Membership:
Terra M Keller

*VP of Professional Advancement and Solo Shops
Networking Group Facilitator:*
John Williams

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Ryan Elizabeth Kelly

DIRECTORS

Webinars Chair: Jillian Carter

Fundamentals of Fundraising Chair:
Michael Crisona

Communications Committee Chair:
Derek DeSol

*Board Member and Senior Advancement
Professionals Networking Group Facilitator:*
Melinda Goldberg

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Ethics Chair: Marlisa Post

Membership Chair: Sarah Goldstein Post

2016 Regional Conference Chair:
Patty Schwarzweller

Government Relations Chair: Marc Smith

Board Member: Josh Symer

Diversity Chair: Gretchen Wood, CFRE

OTHER POSITIONS (NON-BOARD)

Social Media Chair: Kate Balconi

CFRE Chair: Tammy Cohen, CFRE

2015 National Philanthropy Day Chair:
Meaghan de Chateaufieux

Capital Campaigns Networking Group Facilitator:
Karen Higman

Young Professionals Networking Group Facilitators:
Emily Marullo and Danielle Abramson Swartz

Awards Chair: Tracy Schleyer, CFRE

Chapter Administrator:
Brenda Thornton