

# 50 AFP

Association of  
Fundraising Professionals  
1960-2010



# *The First 50 Years*

**ASSOCIATION OF FUNDRAISING PROFESSIONALS**

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**AFP WISHES TO THANK BILL HARRISON FOR  
OUTSTANDING WORK IN RESEARCHING, WRITING AND  
EDITING OUR 50TH ANNIVERSARY RETROSPECTIVE.**

# Preface

**L**ike AFP itself, this history owes much to its contributors. Thank you to all of the living chairs and CEOs who have served since NSFRE/AFP’s silver anniversary for agreeing to be interviewed and for sharing their memories and insights about the organization. Their contributions to this history, as to the organization, have been invaluable.

Thank you, also, to Gale Clarke, Sarah Coviello and Pam Carroll, who gave special insight regarding leaders who are no longer with us.

Several staff members devoted valuable time and effort to tracking down elusive facts and figures. In particular, Rebecca Knight, Michael Nilsen, Reed Stockman, Jackie Boice, Lori Gusdorf and Curtis Deane supplied valuable information and organizational knowledge.

I owe special thanks to former staffer Cathy Williams for diligently digging up dates and facts, for sharing her extensive knowledge and files and—not least—for recommending me to NSFRE in the first place in 1988.

Thank you to the 50th Anniversary Task Force for commissioning this project and, especially, to Hank Goldstein and Don Campbell for taking the time and initiative to ensure that the vision and efforts of AFP’s early leaders will be known to the members and leaders who follow.

Finally, I would like to give recognition to Herbert Howard, CFRE, whose splendid history of NSFR/NSFRE’s first 25 years is the basis for the first 25 years recounted in this document. He said his history was not written to record only the facts and figures of NSFRE’s past, which are appropriately preserved in the organization’s archives, but rather “to bring that past alive for those who have inherited the substance of the dreams envisioned by the society’s founders.”

This document is offered in that spirit. I hope it helps in some measure to achieve that worthy goal.

**Bill Harrison**  
*January 2010*



**Above: The AFP Founders’ Medallion is given to members who have upheld the principles of ethical fundraising during their careers and made extraordinary contributions to the profession and AFP. The medallion features the association’s four founders: Harry Rosen, William R. Simms, Benjamin Sklar and Dr. Abel Hanson.**

# How It Began—The Founding

**T**he National Society of Fund Raisers (NSFR) was officially chartered by the state of New York on June 21, 1960, but its actual beginnings were in the imagination and visions of three fundraisers in New York City.

At some point during the preceding winter, Benjamin Sklar of Brandeis University, William R. Simms of the National Urban League and Harry Rosen of the Federation of Jewish Philanthropies had been discussing the need for a national organization of fundraisers. An association of fundraising firms had been in existence for 25 years (the American Association of Fundraising Counsel, or AAFRC), and there was also an association of fundraisers in New York City (the Association of Fund Raising Directors, or AFRD), but no national organization existed to represent the profession. Over lunch one day at Childs restaurant (on the West side of Fifth Avenue, between 49th and 50th Streets), the three decided to launch such an association.

They agreed to form a national society of fundraisers, but realized they would need an individual with greater prestige and more recognizable credentials to provide leadership. Dr. Abel Hanson of Columbia Teacher's College was their candidate. Sklar, Simms and Rosen called on Dr. Hanson in his office. He agreed that there was a need for a national organization of fundraisers, but initially declined their offer of the society's presidency. They insisted, emphasizing the need for quality leadership to firmly establish the fledgling organization. At last he agreed. In the following months, each of them contacted others in the field. With the charter, the National Society of Fund Raisers (NSFR) was born.

The purposes the founders had in mind for the organization were outlined in the Articles of Incorporation:

- To aid fundraisers in the performance of their professional duties
- To unite those engaged in the profession of fundraising

- To formulate, promote and interpret to organizations, agencies and the public the objectives of fundraising and the role of those who practice it
- To promote and maintain high standards of public service and conduct
- To exchange ideas and experiences and to collect and disseminate information of value to fundraisers and the public
- To promote, sponsor and encourage study, research and instruction in the field of fundraising by means of courses in established institutions of learning and by other means
- To encourage and sponsor the granting of awards and fellowships in recognized institutions of learning for study and research in the field of fundraising

In his president's letter in the first issue of the *Newsletter*, Dr. Hanson wrote: "It is probably too early to identify fundraising as a true profession. But it is clear that among those who serve the agencies of our free society as fundraisers, the desire to improve their work efforts is strong, and positive steps are being taken, of a professional nature, to enhance the effectiveness of the agencies they serve.

"It is at this stage in the history of philanthropy that the National Society of Fund Raisers comes into being. It provides a means, at the national level, whereby individual fundraisers may increase their understanding of the importance of giving in a free society, and it makes possible a unified approach to professional achievement. We applaud the efforts of other organizations that provide for institutional memberships and of the few existing local organizations that unite individual fundraisers. But philanthropy is national in scope. Giving to worthy causes is a historic characteristic of the American people. At the national level, inviting the membership of all qualified fundraisers, the society proposes a unified program of self-improvement and greater service to individuals."

## Dr. Abel Hanson

1961–1963

**H**erbert Howard, the first newsletter editor and the historian of AFP's first 25 years, said that in many ways Abel Hanson was a natural choice to lead the new National Society of Fund Raisers (NSFR). He had visibility, prestige and academic credentials. He had taught a course on fundraising and had written and published a monograph on the subject. He was known as a thoughtful professional in the field.

The new society held its first annual meeting at the Sheraton Atlantic Hotel in New York on Feb. 20, 1961, and elected a 12 person board of directors that included Abel Hanson, Columbia Teacher's College (president); Harry Rosen, Federation of Jewish Philanthropies (vice president); E. Burr Gibson, The National Foundation (treasurer); Emanuel Greenfield, United Jewish Appeal (assistant treasurer); Emily J. Klinkhart, consultant (secretary); Stella A. Koenig, Play Schools Association (assistant secretary); W. Barton Beatty Jr., United Negro College Fund; Maj. W. Eldred Churchill, The Salvation Army; Louis Fischback, D.C.I. (Israel Bonds); William R. Simms, National Urban League; and Benjamin B. Sklar, Brandeis University. The bylaws authorized a total of 25, but 13 places were purposely left vacant "to permit representation later on from other geographic areas, and to increase the board in ratio to the increase in numbers." The board met shortly thereafter, elected Dr. Hanson its first president and established committees on membership, publicity, programs and ethics.

At the end of the society's first year of corporate existence, the membership rolls totaled 197, with \$1,323 in the treasury. At the 1962 annual meeting, NSFR increased the size of the board to 16 and included two new directors who were to be future presidents: Jess W. Speidel II, and K. Brent Woodruff.

In the spring of 1962, the first issue of the *NSFR Newsletter* appeared with co founder William Simms as editor and a promise to publish four times a year. The society held its first annual conference in October 1963. Meeting at the Motel on the Mountain in Suffern, N.Y., the 88 attendees participated in the one day program that focused on the theme "The Future of Philanthropy and the Full Development of Volunteerism." In commenting on the gathering, Dr. Hanson stated prophetically that he expected it to set a pattern for future conferences.

Looking to the future, the society's leadership and members recognized the need to establish the organization on a truly national basis, to retain permanent staff to implement the work of the society and to attract sufficient funding to meet these needs. Discussions also arose concerning the importance of a "research organization or some such appendage to receive tax free gifts," and the establishment of a placement service. Each of these latter concerns was to become an important activity of the society in the future.

In his parting president's letter in the spring 1964 issue of the *Newsletter*, Dr. Hanson noted, "The most important development of the last three years was not a particular event; it was the emergence of the national society as an ongoing organization. Pessimistic predictions to the contrary, the roster includes professional fund directors from all over the United States who serve many of the more notable causes and institutions of the people. A continuing objective of the society in the future must be to attract ethical fundraisers from the many worthy organizations which serve the basic needs of the people."



# Jess W. Speidel II

1964–1965

In February 1964, Jess W. Speidel II, was elected as Dr. Hanson's successor, while Dr. Hanson was duly elected the first chairman of the board. It had been decided that, in the future, the president would serve as the society's chief executive officer. The office of chairman would be essentially honorary, yet provide the society with continuity of leadership and a backup to the president in time of need. In fact, the future would prove that the society's chairs worked very hard, indeed.

The highlights of Jess Speidel's administration were the establishment of the first local chapters, doubling the number of members, two very successful national conferences and the drafting of the society's first code of ethics.

For some time there had had been an organization of fundraisers in New York City called the Association of Fund Raising Directors (AFRD). On Dec. 17, 1963, representatives from NSFR and AFRD met formally to discuss affiliation. The negotiations culminated in a plan by which AFRD, while retaining a large measure of autonomy, would become a local chapter of NSFR, and all members of AFRD would become members of NSFR. Likewise, all members of NSFR within the territory of AFRD (which was defined) would become members of AFRD. The plan also specified program activities by which both the local and national organizations would strive to achieve their professional objectives. The affiliation went into effect on July 15, 1964, adding 106 new members to NSFR, and the society had its first chapter.

The original bylaws of NSFR had not foreseen the possibility of local chapters. The affiliation with AFRD, although an ad hoc arrangement, had been carefully developed. Already in August 1963, Benjamin Sklar had sent a detailed memorandum to the board of directors concerning a proposal

that NSFR authorize the organization and development of local chapters, with the understanding that each would adopt requirements.

In February 1965, the board of directors adopted new bylaws that made provisions for the development of local chapters and their subsequent affiliation with the national organization. These bylaws authorized local chapters of not less than 10 members. In addition, chapter bylaws and purposes were to be in conformity and harmony with those of NSFR, and all chapters were to have representation on the NSFR board of directors. Members of local chapters were to pay national NSFR dues (then \$10 annually), as well as any dues the chapter itself might establish. On May 14, 1965, the Fund Raisers Association of the National Capital in Washington, D.C., became the second NSFR chapter.

With occasional revisions, this procedure has been the governing model by which chapters have formed and joined the association, providing an organized yet flexible system for expansion.

In fulfillment of one of the initial goals of NSFR, in 1965 a special committee chaired by Barnet M. Deutch drafted a code of ethics and standards, which the board adopted.

Speidel's administration also included two successful annual conferences. The second annual conference was held on Oct. 15, 1964, again at the Motel on the Mountain in Suffern, N.Y., with 102 participants attending. The conference fee was still \$12 for members. The following year, in keeping with a new policy of holding conferences in the location of new chapters, the third annual conference was held at the Shoreham Hotel in Washington, D.C.



# K. Brent Woodruff

1966–1967

**K**. Brent Woodruff served only one year as volunteer president, but it was a year of considerable achievement. Woodruff had already been significantly involved in NSFR, having been the founding president of the Washington, D.C. chapter.

The fourth annual conference of NSFR focused on the theme “The Fund Raiser in Philanthropy.” It was held at the Waldorf-Astoria Hotel in New York on Oct. 12–13, 1966, and drew 150 participants, the largest attendance up to that time.

In addition, the society continued to grow, with a chapter forming in Cleveland under the chairmanship of Thomas Dunworth. Twenty-four members associated with the Wells Organization Pty. Limited in Melbourne, Australia, began to plan a chapter there, although unfortunately nothing ever came from their efforts. (AFP currently has a very strong relationship and alliance with the Fundraising Institute Australia, the professional association for fundraisers in that country.)

A similar group in Boston also began planning to form a chapter, and the Massachusetts Chapter ultimately joined the organization in 1967.

NSFR’s first office opened at 10 East 45th Street in New York, staffed by Mrs. Anne Kurzman. Plans were made to implement an “employment opportunities and career center,” one of the first membership services of the new office. Institutions seeking fundraisers would be invited to submit job descriptions to be published in the *Newsletter* at no charge or to be maintained at the career center if confidential. Likewise, members would be invited to submit résumés. This service to members continues to be one of the most popular and valued benefits to this day.

By the end of Woodruff’s time as chair, NSFR had more than 500 members from 27 states, including Hawaii. NSFR was truly becoming national, and the dream of an international association for fundraisers was slowly coming into being.



# Ralph E. Chamberlain

1967–1969

**R**alph E. Chamberlain became a member of NSFR when he moved to New York from Alaska in 1961. He became a board member in 1964, assistant treasurer in 1965–1966, vice president in 1966–1967 and president from 1967 to 1969. From 1982 to 1985, he served as chairman of the NSFRE Institute of Continuing Education (NICE).

His first goals included the expansion of the society's membership through the establishment of local chapters and the development of closer ties with the membership by providing better service through the national office. The two goals were intimately connected: more members would help finance improved membership services, while improved membership services would attract additional members and new chapters. That pattern has prevailed ever since. One such service was the "employment opportunities and career center," originally planned under Woodruff, that began operations in the fall of 1967.

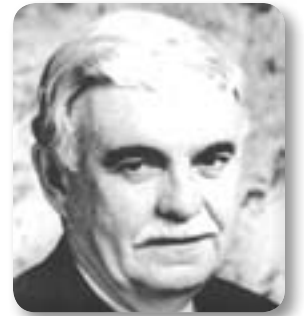
Early evidence of the growing stature and influence of NSFR was the invitation extended to Chamberlain, as president of NSFR, to serve as a consultant to the Ford Foundation on the recruitment, placement and training of black fundraisers for black educational institutions.

At the end of Chamberlain's term in March 1969, NSFR and the Delaware Valley (now Philadelphia) Chapter held the first multi-day conference at the Bellevue Stratford Hotel in Philadelphia.

Previous conferences had been half-day or one-day efforts of modest proportions.

The 1969 conference introduced many elements that would be repeated in future years. Social events included a welcoming cocktail party and reception followed by a dinner.

The two-and-one-half-day conference included four one-hour sessions with numerous discussion groups on such subjects as "What Does NSFR Offer Me As a Professional?" "The Pitfalls and Pleasures of Building a Development Staff From Scratch," "How to Steal a Good Idea" and "Getting Your Governing Board Off Dead Center and More." Conference registration fees were \$60 for members and \$75 for nonmembers, and attendees also enjoyed an award seminar and commentary and a second-day luncheon.





# Robert V. Donahoe

1969–1971

**R**obert V. Donahoe, executive director of the United Givers Fund–National Capital Area, became the first president from beyond NSFR’s traditional New York base.

His administration continued the “nationalization” trend of the National Society of Fund Raisers. Further proof of this trend was the location of the 1970 annual conference in Dallas, Texas, the first time the event had ever been held beyond the East Coast. The event was successful and continued the growing momentum of the society.

By 1971, the society boasted 13 chapters—Minnesota, Rhode Island, Toronto and Northern California had gained charters since 1969. Another reflection of the society’s growth was the 1971 budget: \$21,675, with a surplus of \$883 at year’s end.

With the opening of a national office in 1965, the development of a professional staff

slowly began to take shape. Donahoe’s administration witnessed the appointment of the society’s first executive director, Noel C. Koch. After his resignation in 1970, Byrne Whalen joined the staff on a part-time basis. When NSFR moved its offices to a new location in New York City in the summer of 1971, Elvira Piela (as executive secretary) replaced Whalen. The lengthy process of creating a professional staff for the society was to take nearly a decade and the combined efforts of the society’s leadership and its friends during those years.

Contributions from AFRD/NSFR, New York Chapter (\$3,000 grant) and from AAFRC (\$1,800 grant in 1969 for the third consecutive year) at this critical time helped make it possible. The work of the staff was significant in keeping programs going and demonstrating to members the full benefits and impact of NSFR.



# Norman C. Smith

1971–1973

**N**orman C. Smith did not attend the annual conference in Boston to hear of his nomination for the NSFR presidency. Ralph Chamberlain, then chairman of the nominating committee, telephoned him with the news and asked if he would serve. Chamberlain also indicated the committee was seeking an individual from the educational field who would provide representation from beyond the New York area. Smith was ideal because he was the vice president for development at Emory University in Atlanta. He did not accept during the telephone call, but did so soon afterward. One factor in his decision was the support of the president of Emory University, who assured Smith that he could spend whatever time was necessary to do a good job.

With the financial and organizational stress of opening the national office, the board decided not

to hold a national conference in 1971. Membership was growing, but the revenue needed to operate and manage a national association was, at this point, larger than membership dues alone could support.

In the 1972 summer *Newsletter*, Smith announced his commitment to meet with every chapter to discuss the role of NSFR (he had already met with AFRD, and had spent three days on the West Coast). Through these visits and his leadership, he hoped to create a sense of national unity and cohesiveness. To that end, the 1972 meetings of the board were held in Chicago, Atlanta, New York and Washington, D.C., and the annual conference was held in Chicago with the theme of “A Volunteer’s Look at Fundraising.”



# Henry (Hank) Goldstein, CFRE

1973–1975

**I**ronically, Hank Goldstein did not support NSFR at first. He had served a term as president of the New York Chapter shortly after advocating that the New York group withdraw from the national group on the grounds that it was not receiving enough benefits. Fortunately, Norman Smith convinced him otherwise, and Goldstein went on to play a pivotal role in the history of the association.

Goldstein's first goal was to keep the organization afloat. He began with a personal commitment. During 1972, NSFR had spent \$28,500, leaving a debt of nearly \$3,000. To ensure the society's solvency, he co-signed a note with Jess Speidel, the treasurer, to personally guarantee the society's debt.

During the first year of his administration, he visited every chapter, talking with the board of directors of each and addressing meetings of the membership to advocate for a strong national organization and the dues increase required to make this a reality. All of his efforts paid off, for in September 1973 the board authorized an increase in dues from \$20 to \$50. The membership did not drop, but actually increased (as Goldstein had predicted). At last, the society was securing a firmer financial basis.

Goldstein also came to realize that the key to a truly strong and effective national association was the ability to maintain a national office with a professional president or chief executive officer. He estimated that \$75,000 per year would be required for a paid president, supporting staff and office. Since income from dues in that year was expected to be \$50,000, they were, he said, "not that far away."

In 1973, in order to give NSFR the ability to raise and accept donated funds, the NSFR Institute of Continuing Education (NICE) was founded and incorporated as a 501(c)(3) subsidiary of NSFR.

This body was the "research organization or some such appendage to receive tax-free gifts" that the founders had discussed at NSFR's first annual meeting back in February 1961. The institute also provided the society with the means to renew its commitment to one of its founding principles: education in the fundraising field.

Goldstein reflected frankly on an important factor that challenges and constrains all AFP elected leaders: "I was carrying a full client load during my time as NSFR president. I don't suppose my responsibilities were less or greater than those of other presidents and chairmen, but I can assure you that it was a lot of extra work. It was at least a day a week and often more because of the travel. I caught up on weekends. Because of the society's perilous financial condition, there was no travel budget for the president. My company agreed to underwrite my expenses as a contribution to the society. If not for Harold Oram's goodwill and agreement, I would not have been able to personally undertake the travel that I did."

Despite those pressures, Goldstein thoroughly enjoyed his time as chair. "I liked all of the politics very much and enjoyed making things happen...I think that perhaps my most important contribution was to set the society going on the secure financial base, which characterizes it today."



# Byron Welch

1975–1978

**B**yron Welch was elected president at the New York board meeting in March 1975 and served as volunteer president until 1977. With the establishment of the paid presidency in 1977, he became chairman of the board (the title of the volunteer leader of the society since then).

With the society gaining strength and stability from the recent dues increase, Welch was able to accomplish numerous milestones, including the establishment of the paid presidency and the move of the national office from New York to Washington, D.C. The work of the society, and the number of volunteer committees involved in the society's efforts, increased significantly.

Welch led the search in 1976 for a paid president for NSFR and ultimately appointed Fletcher Hall. That same year, an agreement was reached with the Chicago Society of Fund Raising Executives for it to become an NSFR affiliate in 1977 and then a full chapter in 1978. The inauguration of NSFR's Pantheon of Philanthropy, the predecessor of AFP's current Awards for Philanthropy, was also held in 1976 to recognize leaders in fundraising and philanthropy.

In 1977, NSFR's national offices moved from New York to Washington, D.C. The move was not only symbolic of the growing national scope of the organization, but also allowed the society to become more involved in public policy on Capitol Hill. A very successful national conference was held in Chicago in 1977 to support the new NSFR affiliate there, and Fletcher Hall officially assumed his duties.

In addition, the name of the organization was changed from the National Society of Fund Raisers (NSFR) to the National Society of Fund Raising Executives (NSFRE).

Despite the numerous accomplishments of NSFR/NSFRE during this time, Welch noted in an account of his administration for the association's 25th anniversary history that "all was not sunshine and light during the troubled years of the mid- and late 1970s." As he described it, "There was the cost-study program, which was made possible by the sponsorship and funding efforts of the NSFRE Institute. I set out a plan to work closely with the Association of Attorneys General and the American Association of Certified Public Accountants in determining true costs for fundraising activities in the United States. The concept of the initial plan called for an NSFR committee, headed by Henry Goldstein, to interface with attorneys general representatives in key states (such as Ohio, California and New York) and under the leadership of the CPA organization that headed the charitable reporting segment of that body, so that the American public could expect to have accuracy in full disclosure of true fundraising costs. The whole program went in another direction. Stephen Smallwood, one of the vice chairmen of NSFR and a thoughtful leader from Boston, headed the cost-study committee and devoted enormous time and effort to the project. In spite of its sincere efforts and intentions, the cost-study committee failed to achieve its goals. The project did produce some positive results, particularly in opening lines of communication among organizations concerned with charitable issues."

Welch concluded, "This history of an organization is essentially a history of its leaders and their judgments, viewed against the past and the present. NSFRE has been fortunate in capturing the time and energies of good people whose contributions have enabled the society to make its mark in our common society."



# Donald A. Campbell Jr., CFRE

1978–1980

**N**SFRE achieved a more effective and efficient governance system under the administration of Don Campbell. The national office blossomed as a support source and a leadership vehicle for members. The board began to function through various committees as opposed to a committee of the whole. Chapters increased in program, size and numbers. Numerous goals, both financial and programmatic, were increased and still met.

As Campbell wrote about some of these changes, “What NSFRE needed to become was not an issue; how to get there was. NSFRE was clearly a voluntary organization led largely by the chair (and a few others), with administrative support provided by staff. At this juncture, even staffing was a question, for Fletcher Hall was in the process of leaving his position as executive vice president [and] it was to be some time before James Maxwell occupied the post.”

Campbell traveled the country to speak with the past leaders. “The input I had received from my conversations, together with my perceptions of what was needed and what the activities of NSFRE ought to be, all packed themselves very nicely into four major operating thrusts for the society. Each would be headed by a vice chairman who would oversee the activities of a variety of committees. Thus, the divisional structure of NSFRE was born. We had divisions for professional education, membership activities, public affairs and marketing. In addition, we had a set of administrative committees to handle such issues as bylaws, finance, long-range planning (the association’s first), personnel and chapter liaison. Under the division structure, NSFRE’s board consisted of 28 separate committees, each of which had a charge for the year, as well as a set of activities to be accomplished.

“As we went into the year, I realized that NSFRE was not an organization unto itself, but a federation of chapters. NSFRE was the ‘congress’ of the membership. Realizing that the board’s larger purpose was to be a forum for the discussion of ideas, a vehicle for the development of leaders and a melting pot of concepts that seemed to differ from one chapter to the next, the division and committee structure seemed to provide a welcome vehicle for individuals to get in, get involved and begin to ‘own’ the society.

“I will never forget a very significant board meeting we had—in June of 1979, I think—when Wilson Schroeder and I attempted to ‘railroad’ about six major bylaw changes through the board. One of them was proportionate representation. The motions were tabled, and members of the board made it very clear that they wanted policy and practice recommendations to come up through the committees rather than down through the chair. This was a significant step for the long term, for the board had demonstrated real maturity in terms of governance.

“I learned a vast amount in those two years as chairman. It was one of the most concentrated educational processes I have ever experienced. It was also humbling in the extreme. I wouldn’t take a million dollars for the experience, but I wouldn’t give a nickel to do it again!”



# Robert C. Blum

1980–1981

**A**t the start of his administration, Bob Blum set forth a plan of developing international ties into a worldwide confederation of professional fundraisers. Toward this end:

- An agreement was negotiated with the Australian Institute of Fundraising (now Fundraising Institute Australia), incorporating their 300 members as affiliates of NSFRE. A framework was developed for exchanging ideas, speakers, publications and services. This organization brought NSFRE into contact with professional fundraisers in Australia, New Zealand, India, South Africa and several regions in Asia.
- Negotiations were begun to bring about the independence of the Canadian Society of Fund Raising Executives by changing its status from that of a chapter to that of an independent—though still affiliated—organization.
- Preliminary conversations were held with representatives of fundraisers in the United Kingdom who were in the midst of forming a new organization of professional fundraising managers.

The beginning of Blum's term coincided with the employment of J. Richard Wilson as executive vice president (a title later changed to president). Wilson's task was to restructure NSFRE from an organization primarily led by volunteers with staff support to one led by staff with volunteer input in policy and grassroots activities. This change was significant, and Wilson had to move firmly but with sensitivity in building his staff and taking control of many activities. Wilson and the officers jointly developed a policy to obtain outside consulting services until there was sufficient budget

to hire internal employees. Thus, beginning with the annual conference in St. Louis in 1981, the event changed from being a volunteer-run activity to a staff-run activity by using paid consultants for program development and registration procedures, as well as for conference management.

The certification program finally became a reality during Blum's term. Almost 10 years' effort had gone into the program, and in 1981 the first Certified Fund Raising Executive (CFRE) credentials were awarded to 166 professionals in the United States and Canada.

About certification, Blum wrote, "This made a major difference in the stature of NSFRE, not only in the eyes of the philanthropic community, but also in the eyes of its own members. It certainly made a difference in our ability to recruit new chapters and explain the national impact of our professional society. We were truly thankful for the interest that Charles Johnson took in the certification project, for it was on his recommendation that the Lilly Endowment made a grant of \$50,000, which initially financed the project. Many faithful board members and chapters contributed to the fund as well."

Also, in 1980, under the leadership of Sarah Coviello, the Pantheon of Philanthropy became the Philanthropy Awards program, with awards for Outstanding Fund-Raising Professional, Outstanding Volunteer Fund-Raiser and Outstanding Philanthropist. Additional categories of honorees were added later.



# Thomas G. Sanberg

1982–1983

**W**hen writing about his term as chair, Sanberg stated that the main focus was “professionalism—preached everywhere by all leaders in philanthropy. Educational opportunities were abundant. Workshops, conferences and seminars on the local and national levels were held with increasing frequency. The society was attracting young people, many of whom were women. NSFRE recognized its responsibility to entry-level fundraising managers and produced the best teaching techniques in the field.”

During Sanberg’s term, the society took major steps in education, research and governance. The society sponsored a substantive study of public attitudes toward fundraising and fundraising managers, conducted nationally by Rutgers University’s graduate business school students. It also held the first conference for senior fundraising managers at the Scanticon-Princeton Conference Center in Princeton, N.J.

The NSFRE board of directors finally addressed its growing governance challenges. With the increase in the number of chapters, and with bylaws providing for three chapter representatives for each chapter, the size of the board was approaching 200. In 1983, NSFRE changed the bylaws that reduced the size of the board to about 125, providing for only nominal growth thereafter based on proportional representation.

The annual conference was held time for the first time outside of the United States in Toronto in 1982, and the name was changed to the International Conference on Fund Raising. Present at the conference were professional fundraisers from the United States, Canada, Mexico, England, Ireland, France and Australia. The conference was a huge success, attracting 800 people, a record at the time. Also during the conference,

Lyle Cook received NSFRE’s first “Overall Philanthropic Excellence” award for his efforts to create the certification program. The award ultimately evolved into the Chair’s Award for Outstanding Service, which has been given only 13 times since 1982.



However, no one was prepared for the response to the 1983 international conference in Boston, which drew nearly 1,200 attendees, smashing the association’s attendance record set the previous year. Nationally recognized speakers and new education tracks for senior-level fundraisers, both of which remain staples at AFP’s current conferences, were introduced in Boston and were the highlights of the meeting.

With Charles E. Lawson, CFRE, as chair, the NSFRE Institute underwent a major revival. The institute revised its goals, developed a comprehensive plan, created an advancement fund, launched a major fund drive and infused the board with a group of new directors. The year 1983 also included a retreat by the cabinet [i.e., officers] led by past chair Henry Goldstein, CFRE, at which the officers hammered out a five-year plan that gave substantial order to the society’s activities and growth over the next few years.

Under Sanberg’s leadership, 1983 closed with membership standing at slightly less than 5,000 and an approved 1984 budget of \$619,000 (up 85 percent over 1981). NSFRE staff had grown from four to a total of nine in two short years. Sanberg later wrote that at the end of his term as chair, “the society was in excellent condition fiscally and administratively, with a strong sense of purpose and full, unqualified support from the whole philanthropic community.”

# Barbara H. Marion, CFRE

1984–1985

**B**arbara Marion was the first woman to chair NSFRE and the NSFRE Institute. Her term as chair occurred during a time of tremendous growth in nonprofit organizations and NSFRE membership. The society's new financial and political stability made it possible to initiate a variety of new programs and to place increased emphasis on external relations.

Besides reducing the size of the board, the 1983 bylaw changes included two other key provisions that brought more order to NSFRE operations: The fiscal year was moved to align with the calendar year, allowing officer terms to now coincide with the fiscal year, and the election of officers was moved to the last board meeting of the year so that officers could hit the ground running when they took office in January.

In 1984, NSFRE formed a marketing committee and hired its first director of marketing, Gale Clarke, bringing the number of staff to 14. The next year NSFRE moved its offices from Washington, D.C., to expanded space in Alexandria, Va. The increase in staff enabled NSFRE to shift from a primarily operations-oriented board to a more policy-oriented board.

At the invitation of NSFRE, the volunteer leadership of the major organizations representing fundraising professionals—the American Association of Fund Raising Counsel (AAFRC, now the Giving Institute), the Council for Advancement and Support of Education (CASE), the National Association for Hospital Development (NAHD) and NSFRE—gathered in a historic first meeting to discuss issues of common interest. While this group, later dubbed “The Consortium,” no longer meets officially, it set the foundation for numerous projects and initiatives among the participating organizations that continue to this day.

Through the efforts of its external affairs division, NSFRE, with NAHD and Independent Sector, co-hosted a successful conference, “Capitol Hill Day,” to plan strategies about current and future threats to the favorable tax status afforded to nonprofit organizations and their contributors.



At the international conference in 1984, the professional advancement division developed and presented “A First Course in Fund Raising,” which set the standard for subsequent educational courses. It also began developing a case statement to seek funds for developing a program for advanced certification.

At Marion's instigation, the board created a minorities task force, with the goal of recruiting more fundraisers from diverse communities.

In 1985, with more office space in Alexandria, NSFRE and the NSFRE Institute jointly created a library and resource center to make fundraising publications and information available to members. NSFRE also distributed the first *Profile* career survey and created the group life and disability insurance program for members.

As NSFRE celebrated its 25th anniversary in 1985, the association included 5,400 members, 70 chapters in 40 states and provinces, 133 national board members and a \$814,000 budget, including a \$5,000 start-up fund for new chapters.

In 2001, Marion reflected on being the first woman to chair NSFRE. She credited Byron Welch and Don Campbell for recognizing that it was time to have a female chair because more and more women were becoming fundraisers. There were some skeptics, however. “Because of them, I had to be more firm, more aloof at first than I would have been otherwise,” she once admitted. When asked if being the first female chair was worth it, she said, “It was worth it in spades! Of course, it took a while to have the second one!”



# John Miltner, Ph.D., CFRE

1986–1987

**J**ohn Miltner brought a new sense of style to the NSFRE chairmanship, and his manner rubbed off on his colleagues and successors. Miltner, like President and CEO Dick Wilson, believed in developing a partnership between volunteers and staff. Miltner and Wilson worked closely together and set an example for subsequent volunteer and staff leaders.

Miltner's term as chair included numerous successes in public affairs and public policy. In 1986, under the leadership of Milton Murray, FAHP, the association succeeded in having the White House declare Nov. 15 as National Philanthropy Day® (NPD) and helped organize the first NPD celebration.

At the same time, as Congress sought ways to reduce the federal deficit, the nonprofit sector was damaged by several provisions in the Tax Reform Act of 1986. In response, NSFRE joined with other organizations in the philanthropic sector to educate Congress on the role the sector plays in supporting causes not served by government.

With a grant from the Lilly Endowment, NSFRE worked with several organizations—the Council for the Advancement and Support of Education (CASE), National Association for Hospital Development (NAHD), American Association of Fund Raising Council (AAFRC) and several local planned-giving councils—to stage the first annual National Conference on Planned Giving.

In 1987, NSFRE began a two-year comprehensive strategic planning process to address member needs in the areas of education, ethics, member services and outreach, organization and finance, and organizational relationships.

Also with support from the Lilly Endowment, NSFRE organized a “Think Tank on Education” in the fall of 1987, bringing together 46 of the nation's premier fundraisers and educators to examine fundraising education for the 1990s. The event led to future think tanks that continue to this day, addressing a variety of critical topics affecting fundraising and philanthropy. NSFRE also worked with NAHD and AAFRC to study the feasibility of a joint certification process for fundraisers.

The board honored Bob Pierpont, CFRE, for seven years of service as the chair of the NSFRE Certification Board and, upon the recommendation of a special study committee chaired by Barbara Marion, approved creating a program on advanced certification.

Miltner was one of the first NSFRE chairs to go on to a career outside of fundraising. A former vice chancellor for advancement at the University of California (Irvine), in 1991 he became president of Millican University in Decatur, Ill. Tragically, he died in September 1992, after serving only a little more than one year.



# Marshall Monroe, CFRE

1988–1989

**M**arshall Monroe's term started with an emphasis on consolidating growth and advancing the initiatives started in recent years, including strategic planning, advanced certification and the minorities task force. Monroe conducted a vigorous campaign of visiting chapters, and he placed a priority on "listening to what they had to say and making sure they understood NSFRE!" He also made a point to interact and work closely with the other fundraising organizations and fundraising firms.

In December 1988, with funding from the Kellogg Foundation through the NSFRE Foundation (the name had changed on April 28, 1987), NSFRE conducted a Forum on Ethics in Fund Raising, which brought together representatives from health, education, social services and cultural organizations; related disciplines, such as law, financial planning and accounting; and grant-making institutions. The purpose of the forum was to take a critical look at setting ethical standards, educating fundraisers and informing the general public about the importance of ethical conduct in fundraising. The forum would help guide AFP's ethical outreach programs for many years.

Monroe's peaceful term took a sudden turn in late December 1988 when NSFRE President Dick Wilson unexpectedly died of a heart attack. Without their dynamic CEO, who over the previous eight years had personally built the staff and strengthened the organization, the volunteer officers and staff had to step in to run things. Gale Clarke, who had just been promoted to chief operating officer, suddenly found herself in the role of acting CEO. Fortunately, the officers, committee members and staff rose to the occasion and, remarkably, the organization proceeded with scarcely a hitch.

Monroe appointed a search committee, and after several months the committee recommended and the board approved the selection of Ian T. Sturrock, Ph.D., CFRE, to take office on Oct. 1.

Unfortunately, tragedy struck again. While he was visiting Alexandria to find a place to live, Sturrock died of a heart attack on Aug. 30, 1989, at age 45. The search committee went to work again.

The 1989 international conference was held in Anaheim, Calif., just three months after Wilson passed away. Nevertheless, staff and volunteers came together to deliver one of the most successful conferences to date, with pre-conference workshops and a full array of professional development programs. NSFRE also conducted the first Executive Leadership Institute (ELI) at Indiana University for senior fundraising executives.

For several years, Wilson had advocated reducing the size of the board of directors. In late 1989, Monroe appointed a Board Restructure Task Force, with Patricia F. Lewis, CFRE, as chair, to make recommendations for achieving this goal. At the same time, the number of NSFRE chapters reached 100, and the society published the first chapter development manual.

An ethics situation during this time forced a controversial change to the NSFRE ethics policy. When NSFRE considered revoking the membership of a member accused of accepting percentage-based compensation, legal counsel advised that taking such action would put NSFRE at risk of sanction by the Federal Trade Commission. As a result, the board voted to suspend that provision of the code. This move was greatly unpopular with many members who felt that the prohibition against percentage-based fundraising was the cornerstone of the profession. However, the board felt the move was necessary to protect the organization.



# Del Staecker, ACFRE

1990–1991

**D**el Staecker presided over a period of internal turmoil. Many members were unhappy about the controversial decision to suspend the prohibition against percentage-based fundraising. Many were also upset about the organization's governance structure because, once again, the board of directors had grown to more than 150 members and the executive committee functioned like a board. To make matters worse, after only a few months in the position, the newly hired CEO parted ways with the board and resigned. Thus, once again, NSFRE was without a permanent CEO.

Staecker took the situation in stride. He appointed John Lore to head a new search committee. Meanwhile, Gale Clarke continued serving as COO and acting CEO. This time the search committee and board turned to Chair-elect Patricia F. Lewis, CFRE, the CEO of the Seattle-King County Council of Camp Fire Boys and Girls. She became the new NSFRE president and CEO in March 1991.

Although the staffing, ethics and governance issues absorbed much attention in 1990, other initiatives did not stop. Notably, work on advanced certification continued, and the Research Council was established.

After Wilson's death, the consortium of fundraising CEOs stopped meeting. To help fill the void and keep the organizations working together, Staecker came up with the idea of creating a "Donor Bill of Rights." He appointed a task force to draft a document and work with other major fundraising organizations to obtain input and endorsement. The document was adopted by

the Association for Healthcare Philanthropy (AHP, formerly NAHD), CASE, AAFRC and NSFRE. Today, thousands of organizations around the world have adopted and use *A Donor Bill of Rights* in their fundraising programs, and it has become an essential element of AFP's ethics program. When asked which accomplishment gave him the most satisfaction, Staecker quickly pointed to the development of *A Donor Bill of Rights*.

In November 1991, the Board Restructure Task Force presented a proposal, which was later adopted, to reduce the board size to 35 members. The proposal would classify the chapters into four "metro" categories according to size and represent chapters through a "national assembly" based on proportional representation from the metros with authority to approve any changes to the bylaws, code of ethics and dues structure. Later, at the urging of the Canadian members, the National Assembly was renamed the Delegate Assembly to more accurately reflect NSFRE's international membership.

To resolve the impasse over ethics enforcement, Staecker appointed Hank Goldstein and a distinguished group of senior fundraisers—including Barbara Marion, Sarah Coviello, Bob Pierpont and Irwin Brod—to revise the code of ethics and create standards of professional practice that could be legally enforced. The board adopted the ethics committee's recommendations for an aspirational *Code of Ethical Principles* in November 1991.



# Charles R. Stephens

1992–1993

**C**harles Stephens was NSFRE's first African-American chair. His accomplishments included implementing a new governing process, giving new vigor to government relations, taking National Philanthropy Day to a new level, completing and marketing the NSFRE code of ethics and enforcement process, resolving a potentially threatening crisis with the Toronto chapter, supporting Russell Raker's successful efforts to develop the ACFRE program at no cost to the society, and developing and implementing a public service emphasis across the society through the "FRIENDS" program.

At the start of his term as chair, Stephens and Pat Lewis, then NSFRE's president and CEO, spent much of their time garnering support for the proposed new governance structure. Through their efforts, the new governance plan was adopted in 1992.

As the first African-American chair of the society, Stephens saw an opportunity to place major emphasis on recruiting minority members to the profession and getting more women involved in leadership. He appointed a strong Minority Affairs Committee led by Dorothy Darby of Chicago and collaborated with the committee to emphasize the importance of inclusion for the profession of fundraising. He visited many chapters and carried this message in every presentation he made. He also spoke about the issue to many universities, including historically black universities.

During Stephens' term as chair, advanced certification became a reality, and the first Advanced Certified Fundraising Executive (ACFRE) credentials were awarded in 1993. Stephens also got board approval to publish a dictionary of fundraising terms and appointed Barbara Levy to lead the project.

Stephens initiated another renaissance in government relations, during which he, Lewis and AFP Treasurer Bill Moran testified before the House Ways and Means Committee, the Internal Revenue

Service and the Federal Accounting Standards Board on proposed legislation affecting philanthropy and fundraising.

In November 1992, Stephens led the board in adopting the *Code of Ethical Principles and Standards of Professional Practice* recommended by the Ethics Task Force. He then appointed Bob Pierpont to chair the Ethics Committee and produce enforcement procedures for the Code, which were adopted and published in November 1993.

An event that helped build public awareness of professionalism in fundraising occurred when Stephens and Lewis rolled out the new code of ethics at a press conference. A reporter asked, "How many people do this kind of work?" Stephens replied, "About 50,000." The reporter then asked, "How can you influence this field with less than 10 percent of the people in it." Stephens responded, "Before this code, you and the members of the public had no standards by which to judge the folks who do this work." Stephens later said, "The response went over pretty well."

When asked what his most significant accomplishment was during his time as board chair, Stephens replied, "Inclusion. A lot of folks could have done governance. My activity in inclusion was obvious. I was the one to do it. My approach was to do it in a conciliatory and cooperative way. But I was firm. I am particularly proud of what we did. We were less than 10 percent [of the membership] in my second term, but we kept plugging. In chapter visits, I was direct."

"I'm also proud that I started all of the board meetings with a three to five-minute statement of criticality of who we are and what we do," Stephens added. "I wanted us to focus on our responsibility to the public for what we do—to teach giving and teach about philanthropy beyond just giving a gift—to advance philanthropy and the philanthropic tradition as a concept in our society. I still believe that. They are two peas in a pod—philanthropy and diversity."



# John S. Lore, Ph.D., CFRE

1994

**W**hen he became chair, John Lore's most important goal was to establish a strategic-planning process to bring more stability to the organization and guide its future years. He introduced a process and took it through the board, chapters and the international conference for input and approval.

Lore's second goal was to continue to strengthen NSFRE's legislative involvement. As early as 1988, he and Paul Comstock urged the society to become more active in government relations to educate lawmakers about the contributions the voluntary sector makes to society. They also were concerned about countering the growing risk of government regulation of the profession and the erosion of the tax incentives of philanthropic giving.

However, the position was not always popular in NSFRE. Many members and leaders wanted nothing to do with government, feeling that "lobbying" had no place in the voluntary and philanthropic sectors. Nevertheless, through the leadership of Lore and future chairs, NSFRE gradually became more and more involved in monitoring and informing legislative and regulatory thinking about the contributions that philanthropy and the nonprofit sector make to society in areas not addressed by the government.

Other NSFRE programs continued to expand under Lore's leadership. In 1994, registration for the international conference had to be cut off because early-bird registration exceeded the total registration of the previous year by 25 percent. During this time, NSFRE also established a publishing arrangement with John Wiley & Sons to issue a series of high-quality books about fundraising under the imprimatur of NSFRE.

Lore observed that when NSFRE was seeking funding for ethics, the Kellogg Foundation and other grant-making institutions were impressed with NSFRE's emphasis on ethics and its efforts to address shortcomings in its code of ethics. At the time, the grant-making community had not adopted ethical standards of its own, and the NSFRE example prompted its members to do so.

He also reflected on a problem that continues to face chairs of the society. The position of chair requires considerable time and money, and not all potential leaders can afford it. Most have had to ask for special release from their employer in order to serve. In Lore's case, he received a promotion to a top executive position in his hospital system just as he was becoming NSFRE chair. Lore's board of trustees agreed to fund a full-time assistant to help him, but he was able to serve as chair for only one year. He said his biggest disappointment was not being able to serve a second year, as a result of becoming the president and CEO of one of the nation's largest health care systems.

At the same time, Lore acknowledged the invaluable contribution that COO Gale Clarke made during the tumultuous interim between CEOs. "She was the mortar that held the organization together. She knew how to talk with all of the leaders, and some of us were pretty hard to get along with. I don't know what the association would be today if not for her."

In fact, he added, "fundraising has changed as a result of the collective leadership of NSFRE. We are looked at as professionals now."



# Sandra A. Adams, ACFRE

1995–1996

In 1995, Sandra Adams became the second female chair of NSFRE. She was the first NSFRE chair to achieve ACFRE status. During her term, universal certification for nonprofit fundraisers finally came into being. Both NSFRE and the Association for Healthcare Philanthropy (AHP) had developed separate certification programs, and Adams and Lewis spent long hours at the negotiating table with Bill McGinley, AHP's president and CEO. In the end, both the NSFRE and AHP boards approved the draft agreement, and a universal certification was created.

Another happy success during Adams' term as chair was the international conference. With attendance exceeding 3,700, the 1996 international conference in Los Angeles became the largest meeting of fundraisers in the world up to that point.

An incident at that conference illustrates the personal nature of the organization at the time. Because of a glitch at the conference center, the meals for one of the plenary luncheons did not arrive on time. Hungry attendees queued up in long lines and became increasingly angry as they waited. When the luncheon finally concluded, Adams greeted the subsequent plenary session saying, "Blessed are the flexible, for they shall not be bent out of shape." She then had the audience stand and recite the phrase in unison. People laughed, and at the closing session they repeated the mantra.

Adams said that groundbreakers such as Barbara Marion and Sarah Coviello paved the way for her. She remembered Ron Carroll's being especially helpful to her as well, particularly in addressing NSFRE's financial issues. Because

she was only the second woman to head the society, she attracted attention from many of the female members. Many women came up to her at meetings and said how happy they were that the organization was opening up to women in the leadership.

At the time, NSFRE staff was still quite small. "I personally typed the first draft of the final CFRE agreement," Adams recalled. "I was still learning to use a word processor at the time." She said she really respects many of the staff and asked that this history recognize the huge value they brought to the organization. She especially singled out Cathy Williams, Ph.D., CAE (who served full-time from 1987 to 2008), saying, "I can't even imagine what the education arena would have been without her."

The society was still evolving into the organization it is today. "At the time when I was chair," Adams explained, "we were still a professional society—a gathering of professional practitioners, with an emphasis on education and not much on government relations. There is a huge difference now. Now it is a real trade association."

Another testimony to the strength of the organization is that it never stopped growing. "I think that's due in large part to the fabulous chapter system," Adams pointed out. "It's almost like a federation of chapters because that's where the membership growth happens and most people get their education programs. Even though there have been tensions with chapters at times, I think the organization as a whole has allowed a huge amount of local autonomy, and this has made a tremendous effect on the growth and strength of the organization."



# Ron L. Carroll, CFRE

1997–1998

**R**on Carroll served at a time when his considerable skills as a diplomat and problem solver were major assets to the organization.

As she had indicated in November 1997, Pat Lewis resigned in March 1998 after seven years as NSFRE president. Carroll appointed a search committee, and on July 1, 1998, Paulette V. Maehara, CFRE, CAE, formerly CEO of the Epilepsy Foundation, took office as president and CEO. Her first three goals were to improve financial management, build an appropriate staff structure and increase revenue.

Carroll took as his particular mission to expand the international membership and influence of NSFRE. He strengthened the association's bond with its Canadian chapters, paving the way for future Canadian expansion. He also established relationships with fundraising leaders in Mexico and several other countries, discussed ways they could become affiliated with NSFRE without having to become a chapter and was instrumental in creating a chapter in San Juan, Puerto Rico.

Under Carroll's leadership, NSFRE underwent several changes and enjoyed successes in numerous areas. In 1997, the nominating committee was renamed the Committee on Directorship, with expanded responsibilities, including evaluating the performance of the board of directors. In 1998, NSFRE held the first Executive Management Institute at Vanderbilt University, a program that has led to additional programs and increased association focus on developing executive leadership and planning skills for fundraisers.

A huge victory for the profession and all of philanthropy occurred on Oct. 7, 1998, when, after a dogged 27-year campaign waged by

long-time member Milton J. Murray, FAHP, the U.S. Postal Service issued the first postage stamp honoring philanthropy. NSFRE led a coalition of fundraising groups in increasing public awareness and usage of the stamp.

After serving as chair, Carroll went on to chair a task force to develop NSFRE's international program. He advocated a policy of flexible affiliation with NSFRE to accommodate the particular needs of other countries and urged the organization's participation in world fundraising forums without trying to dominate them. In so doing, he laid the groundwork that has resulted in AFP's dramatic expansion in the international arena since 2000 and its current position as a world leader in philanthropy and fundraising.

Carroll was active in the People to People program first started by Dwight Eisenhower. He took several delegations of fundraising executives to other countries and started a tradition of each AFP chair's leading such a delegation.

Carroll's understated, self-effacing, southern manner was universally admired. Friends and fellow officers remembered him as a gentleman, a practical problem solver and a person of excellent judgment and patience, who was generous in helping young fundraisers and absolutely dedicated to philanthropy and the mission and principles of NSFRE. He had a wonderful sense of humor and took great pride in the successes of others. Tragically, he died from brain cancer at age 59 on Feb. 28, 2005.



# Barbara H. Mulville, CFRE

1999–2000

**D**uring Barbara Mulville's term, NSFRE addressed several significant issues and underwent major changes.

First and foremost, the organization changed its name. By 1999, chapters and membership in Canada were expanding rapidly, and Canadian members pointed out that the word "national" in NSFRE's name was inaccurate. They pushed to change the name to reflect the organization's increasingly international scope. After study by a task force and significant member input, the board and Delegate Assembly changed the organization's name to the Association of Fundraising Professionals (AFP) and adopted a new logo.

The association also decided to make the CFRE board and program an independent organization. Making that happen was a different matter. The proposal stemmed from the desire by the organizations participating in CFRE certification to obtain accreditation for the credential. The accrediting authority required that the administering body be independent from the AFP board. Many of those who favored a common "baseline credential" for all nonprofit fundraisers (including those outside of AFP) urged the creation of an independent body that could obtain accreditation and thereby increase the prestige of the credential. Many also felt that this move would help attract more applicants for the CFRE. Opposed were many members who felt that the CFRE had been created by NSFRE, was largely supported by NSFRE and therefore should remain under the jurisdiction and control of the NSFRE (now AFP) board.

Feelings on both sides were strong. Mulville later said, "I fell on my sword for the [independent] CFRE. I felt it was time to let it go out. It was very controversial."

With the rapid growth in the number of chapters and members in the late 1980s and 1990s, some chapters were becoming unsettled. The large chapters supplied much of NSFRE's financial support, but felt that the board and staff were not sufficiently attentive to their particular needs. At the same time, many small chapters were struggling with needs of their own, particularly finances. Mulville felt that increased personal visits to chapters were essential. She and the entire executive committee embarked on a stepped-up campaign of chapter visits, speaking at luncheon meetings about AFP and listening to concerns of members and chapter leaders. After this effort, relations between many chapters and the board and staff improved.

The first and only White House Conference on Philanthropy occurred during Mulville's term, and she attended. Although not scheduled to speak, she stood and said to President Clinton, "By what you have done in holding this conference in the White House, you have increased the value of the people who work in the philanthropic and fundraising professions." Afterward, the president told her, "You were the only chair [of the participating organizations] who listened to me."

Mulville fondly recalled a time when she was treasurer and had to try to sell a dues increase to the Delegate Assembly. At the podium, she ducked down, put on a hockey mask and then said, "All right, now I'm ready to take any of your questions." The room broke into laughter, and the dues increase passed.





# Steve W. Batson, Ed.D., CFRE

2001–2002

**W**hen Steve Batson became chair, the organization faced several issues: leadership stability, financial stability and tension between “what we were and what we probably knew we were going to be—in particular, a national organization versus an international one.”

As chair-elect, Batson had guided the creation of the 2001–2005 strategic plan. When he became chair, he announced three main goals:

1. Advance youth in philanthropy. Batson was concerned that the generation of young people growing up were not interested in philanthropy and fundraising. He later said that he misjudged them. After the terrorist attacks on Sept. 11, 2001, young people were volunteering and raising money for the victims on a scale not previously seen before.
2. Ensure that AFP is a diverse organization. Toward this end, Batson told all the chapters he visited that they needed to have diversity in their membership, officers and boards of directors. Some chapters resisted. He said this position was still controversial in some parts of the country at the time, but in the end it proved to be well founded.
3. Advance global expansion of the organization. This was by far the most controversial goal. Batson said many members at the time did not understand the potential growth in international fundraising that he and other leaders were seeing. They wanted to use the organization’s resources to support the needs of chapters in the United States. Many asked, “Why do we need to grow internationally?” His response was that AFP should be sure it represents the fundraising profession, wherever it is. “I’m proud that our strategic plan addressed the global expansion of this organization.”

One of Batson’s initiatives was to hold a board of directors meeting in Mexico (a previous board meeting had been held in Guadalajara, Mexico, in 1979). “I wanted the board to see that there were needs outside the United States; that there were professional fundraisers there, even though most of them were unpaid volunteers who were doing our kind of work; and that they needed our development, education, support and system of ethics.”



Another initiative was to continue working to establish an independent CFRE board, a task that required many hours of work at the negotiating table. Continuing the work set in motion by his predecessor, Batson completed the efforts to make the independent CFRE board a reality in 2001.

In 2002, AFP established the AFP PAC (political action committee), making it possible for U.S. members to contribute money to the campaigns of U.S. congressional candidates.

What achievements gave him the most satisfaction? For Batson, it was visiting the chapters. He also said he is honored to be in an organization that gives physically challenged people the opportunity to lead, and looks forward to seeing the next physically challenged fundraiser serve as chair of the association.

# Colette M. Murray, J.D., CFRE

2003–2004

Colette Murray's term was a time of consolidating gains, mending fences and expanding boundaries. She started by visiting some of the large chapters to explore issues, concerns and ways the chapters and the international association could work better together. The meetings with chapters led her to decide that AFP should reexamine its governing structure, which had not been done since 1991. In 2004 she appointed a Governance Task Force, chaired by Steve Batson, to study the governing structure in light of AFP's expanding international membership and make recommendations for improvement. The task force worked for several years and ultimately delivered its recommendations in 2006 calling for major changes.

The association enjoyed many international milestones under Murray's leadership. In 2003, AFP held the international conference outside the United States for the second time in Toronto, Ontario (the first time had been in 1982). Despite the U.S. war in Iraq and an outbreak of the SARS virus that discouraged travel, the conference was a success.

Concurrent with the conference, AFP held the first International Fundraising Summit, with 23 participants representing 19 countries. The summit explored ways fundraising organizations in different countries could work together and explored the possibility of creating a universal code of ethics.

Later in 2003, the First Hemispheric Congress—Latin America, organized by AFP, took place in Mexico City. The AFP China, Hong Kong Chapter also was established that year.

Reflecting the changing recruitment needs and business methods in fundraising, in 2004 AFP created two new membership categories: the student and business categories. The student category made it possible for undergraduate and graduate students on campuses to become familiar with fundraising as a potential career. The business category made it possible for for-profit companies that do business with fundraisers to educate their employees about fundraising and have them ascribe to the AFP code of ethics.

Changes also were made to the AFP Foundation for Philanthropy (previously the NSFRE Foundation). In the past, foundation staff was largely provided or subsidized by the association, so the lines between the two organizations were somewhat indistinct. In 2004 the association and the foundation forged a management agreement to clarify the organizational arrangement and make the foundation financially self-sufficient. The agreement took effect at the beginning of 2005, leading to a new era of foundation operations and management.

In reflecting on her term, Murray emphasized how well the officers worked as a team. "There was honest, open exchange. I felt that Steve [Batson, the immediate past chair], Alphonse [Brown, the chair-elect] and I represented the unbelievable diversity of the organization. We were in communication constantly. And I loved working with Paulette."



# Alphonse J. Brown Jr., ACFRE

2005–2006

Each AFP chair comes to the position with a personal perception of what the organization needs most at the time. In Alphonse Brown's case, he viewed "stewardship of the membership" as the top priority. AFP had grown so large and so fast that he felt it was not engaging the members as it should. He wanted members to have the same or a similar "warm and fuzzy" welcoming feeling he experienced when he first joined the organization. His first goal was to get members more engaged in the organization.

Two events illustrate his emphasis on inclusion and involvement. When he was chair-elect and chair of the Strategic Plan Committee, he created a large committee—20 members, with representation from all parts of the association—to create the plan. He repeatedly urged members to give input to the process. When the plan was finally drafted and thoroughly vetted, it received unanimous board support. Brown said he was "left speechless" by the overwhelmingly positive response and results.

Brown repeated the process with the Governance Task Force recommendations, asking all members to submit ideas for overhauling the 15-year-old governance system. Alternative proposals were examined and debated in surveys, forums and chapter visits, and officers, board and Delegate Assembly members held numerous discussions. Discussion was intense at all levels, especially regarding ways to ensure diversity and achieve global geographic representation. Ultimately, the "geographic district" model was proposed and debated. When the time for the final vote arrived, in November 2006, the Delegate Assembly passed the history-making plan by a majority vote of 79%.

Brown also pushed inclusion in other ways. As the second African-American chair, he had a keen interest in promoting diversity in the organization. With the help of a few key members committed

to racial and ethnic diversity, he created the *Kaleidoscope* newsletter. In all his visits to chapters he promoted the need for the association to embrace diversity. As an outgrowth of collaboration with key volunteers and friends, including Kay C. Peck, CFRE, the ALFORD Group Diversity Art Showcase was first began under Brown's leadership.



Brown was a strong advocate for professional certification. He became the second AFP chair to achieve the ACFRE credential. During his term, AFP began looking for new office space for its future needs, and after an extensive search, the board approved leasing office space in a new building at 4300 Wilson Boulevard in Arlington, VA. Under Brown's leadership, AFP began developing websites for chapters in 2005. The next year the organization commissioned a top-to-bottom assessment of its information technology (IT) capabilities as the first stage of a multiyear process to upgrade AFP's IT structure and staffing. Meanwhile, AFP worked for passage of the CARE Act (which included several incentives to encourage different kinds of charitable giving), conducted a think tank on ethics and held the first meeting of the Industry Partners Council to better work with its for-profit partners. International activities continued with the second Hemispheric Congress—Latin America, the hiring of an area manager for Latin America and, in 2006, the addition of a vice president for international programs to the staff.

In reflecting on his term in office, Brown said he was most proud of the fact that "everyone was heard." He also added, "If it had not been for John Lore, Ron Carroll, Steve Batson and Charles Stephens, I would not be where I am. They reached out and convinced me that there was a place for a second African American in the top leadership of AFP."

# Timothy R. Burcham, CFRE

2007–2008

**A**s AFP chair, Tim Burcham faced what he called “a perfect storm”: a new governance system to implement, a new strategic plan to implement, the move of international headquarters to Arlington, Va., and a massive information technology project to launch. If any of these had gone wrong, it could have caused significant problems for the members.

Burcham brought a strong background in government relations and strategic planning to his term as AFP chair. He was the government liaison for his organization, the Kentucky Community and Technical College System, and as vice chair of AFP for external relations he had taken the lead in establishing the AFP political action committee (PAC) in 2002. He also had developed a strategic plan with measurable objectives for his college system and then had the responsibility as the chair-elect for developing the AFP strategic plan for 2007–2010.

To address the “perfect storm,” Burcham created the SMART initiative. The acronym stood for Strategic, Membership, Advocacy, Resources, and Technology, and the initiative framed the thrust of Burcham’s term as chair.

The AFP planning process for 2007–2010 was a continuation of the previous plan, which had a 30-year vision horizon. The strategic planning committee had refreshed the plan and “backed into” the goals needed by 2010 to accomplish the 30-year vision. Burcham’s main contribution was a series of outcomes and metrics to measure progress toward the goals. “It was a huge accomplishment,” he said. “We did not have data-driven decision making up to that time. It was more difficult than anyone could imagine.”

In addition to implementing the new governance structure and the 2007–2010 strategic plan, Burcham also created a Task Force on Higher Education. Its purpose was to examine the burgeoning higher-education programs in nonprofit management and fundraising, see

how well they matched with what AFP was teaching and determine whether there could be a role for AFP in this area. The task force worked for nearly a year and brought 20 recommendations to the board that will guide AFP’s work in education into the future.

Burcham said the biggest issue he faced was AFP’s relationship with CFRE International. It took a lot of time in discussions, which at times were tense. He said, “Our focus was to keep that organization viable and strong into the future. My biggest disappointment is that we didn’t resolve the issues while I was chair.”

The developing relationships with international partners were an eye-opener for Burcham. “I spent a lot of time on international relations. As much as I had been involved in AFP, I did not realize [until then] how important AFP is around the world to our counterparts. They look to us for leadership and for resources.”

Burcham said that advocacy was always his biggest interest in AFP, “because government leaders really do not understand the nonprofit sector or the fundraising process that is embedded in that sector. As a government liaison for my organization, I understand how important it is to be at the table and that you educate lawmakers on what the issues really are.”

Reflecting on his term as the founding chair of the PAC, Burcham said, “It was controversial at the time. Some members felt it wasn’t appropriate for AFP to do. To be influential, you have to have access to lawmakers, and having a PAC has provided us access. The difference in our advocacy impact today from what it was before the PAC is dramatic.”

During his term as chair, he said, his greatest satisfaction was meeting members everywhere—meeting face-to-face and watching the impact AFP has on what they are trying to accomplish at the chapter level.



# Roberta A. (Robbe) Healey, MBA, NHA, ACFRE

2009–2010

**W**hen Robbe Healey became chair, AFP was encountering one of its most severe challenges ever: the economic downturn that had begun in 2008. “We knew the deteriorating economy would be a problem, but we didn’t know exactly what it would look like. The biggest challenge is to be proactively responsive, but at the same time not be part of the fray that says ‘The sky is falling and we all have to hide.’”

One of Healey’s goals is to exercise a participatory leadership style. She tries to actively involve all the members of the executive committee in leadership decisions, from the beginning of the recognition of a question to the recommendations to the board of how to address it. “Every member of the committee brings different perspectives to the discussion,” she explained, “and I think the synergy is very healthy.”

Healey did not choose a “signature” project as chair because she knew the 50th anniversary would occur during her term. “I really felt we needed to leverage the anniversary—not as a party and not as a way to look back at everything we did—but as a way to effectively position AFP’s impact and brand. We can use the anniversary as a launching point for something that would meet the needs of the future and not merely celebrate the accomplishments of the past, which are myriad.”

One question Healey sometimes hears in chapter visits is “Why do we have a priority on international relations?” To that, she responds, “The donors I work with care about civil society on a global level. While they may be donors to very local causes, they have very focused constituencies. And until we as development

officers see and understand how philanthropy works across the globe, we have failed to be prepared to work with our donors and their individual priorities.”

What have been the highlights of her experience as chair so far? For Healey, there are three. “This is going to sound schmaltzy, but it really is the opportunity to visit so many chapters and meet so many people. It’s wonderful to be reminded of how we affect different constituencies and cultures in different ways. Also, it’s a stunning experience to meet people in other countries, many of whom are pioneers creating the third-sector infrastructure in their countries. People in the United States who think [fundraising] is difficult have no idea what it’s like to work in a culture where the government doesn’t even recognize your right to exist as a nonprofit.”

Another highlight, she said, is “knowing that we have such an extraordinary board team that is willing to make difficult decisions for AFP in the wake of the economy and a staff that is willing to be committed and dedicated to the membership and the mission, even when you are working with budget cuts and staff reductions. It’s truly extraordinary.”

Healey recalled that when she first started in fundraising, she attended Hank Rosso’s fundraising school at Indiana University. Rosso said, “The degree to which your fundraising will be successful will be the extent to which your agency takes fundraising seriously in all its programs.” She said that as chair of AFP her view of fundraising has been affirmed, but not changed.



## *AFP Staff Leadership*

**T**he early elected leaders of the National Society of Fund Raisers (NSFR) acted with the self-awareness of the founders. Their vision was to create an organization for the purpose of creating a profession. Each successive leader has continued that vision.

At first, the organization's programs were developed by individual volunteers and small, ad hoc committees of the board of directors. In time, however, the committee and volunteer structure became more institutionalized. Today, most new program initiatives are developed by many volunteer members working in committees and task forces. Once adopted, the programs are overseen by committees of volunteers and operated chiefly by staff.

Becoming a leader in AFP requires an extensive commitment of time and service. AFP's leaders typically spend years of volunteer service on committees and in elected positions, first at the chapter level and then at the international level. Even when selected for the top position, most chairs commit a full six years to the position—two years as chair-elect, two years as chair and two years as immediate past chair.



With the understanding that most AFP actions are the product of many volunteer hands and that no history can be complete, this section lists some of the developments during each elected leader's term as the organization has evolved.

**Above: 4300 Wilson Blvd. in Arlington, Virginia, is the current location of AFP's international headquarters. AFP also has offices in Toronto, Ontario, and Mexico City.**

# J. Richard Wilson, CFRE

## AFP STAFF LEADERSHIP

1980–1988

**D**ick Wilson was NSFRE's first full-time CEO and came to the organization from being an executive and fundraiser with the Boy Scouts of America. When he arrived in 1980, NSFRE's office was a suite of 648 square feet in the Investment Building at 1511 K. Street, NW, Washington, D.C. At first he was the only employee.

About this period, Bob Blum wrote, "The beginning of my administration coincided with the employment of J. Richard Wilson as executive vice president (later, this title was changed to president). The task which faced us, and which lay heavily on both our shoulders, was to restructure NSFRE from an organization primarily volunteer-led with staff support to one staff-led with volunteer input in policy and grassroots activities. This was a major wrenching change. Dick Wilson had to feel his way in building his staff and taking control of many activities.

"Jointly, a policy was developed to obtain outside consulting services until such time as there was sufficient budget to hire internal employees. Thus, beginning with St. Louis in 1981, the annual conference was changed from a volunteer-run activity to a staff-run activity by using paid consultants for program development and registration procedures, as well as for conference management."

Wilson worked closely with the NSFRE chairs, starting with Bob Blum, to increase revenue, expand membership and build staff. He traveled extensively to visit chapters, promote membership and encourage local fundraisers to get together and form new chapters. Pat Lewis and others credit him with building the chapter network in the 1980s that has sustained the organization ever since.

In so doing, Wilson was the person most responsible for creating AFP's almost unique pattern of joint leadership between volunteers and staff. He believed in it, advocated it and set the example. It is a method of operation that many associations admire, but few achieve.

He not only grew the staff (from one to 14), but also trained them and inspired a commitment to philanthropy and NSFRE. With his leadership, NSFRE resolved its deficits, started a reserve fund and created an endowment. It created National Philanthropy Day®, probably still AFP's most effective public relations initiative, and numerous other services and programs.

A tireless worker, Wilson typically arrived at the office before 7 a.m. and left after 6 p.m. Volunteers and staff said he lived and breathed NSFRE.



# Gale Clarke

## AFP STAFF LEADERSHIP

1988–1991

**G**ale Clarke (now Gale Clarke Ellsworth) played a critical, though unofficial, role in NSFRE through one of its most serious crises.

Dick Wilson hired her in 1984 as NSFRE's first marketing manager. For about a year after she arrived at NSFRE, her "office" was a desk in a closet—along with the office supplies. Clarke's background was marketing in the hospitality industry, and she created NSFRE's first substantial marketing plan.

Clarke seemed destined to be a kind of "first responder" for NSFRE management. Four days after she started at NSFRE, Dick Wilson had his first heart attack, and she had to get instructions for the staff from him at his hospital bedside. Fortunately, the heart attack was not fatal, Wilson returned to work after a few weeks, and operations returned to normal. Clarke returned to developing and implementing her marketing plan, managing meetings and the international conference and obtaining grants for special projects. In October 1988, with the board's insisting that he have a second-in-command, Wilson promoted Clarke to the position of chief operating officer.

In late December 1988, Wilson had a heart attack at home following an office Christmas party. This time the attack was fatal, and Clarke suddenly found herself thrust into the role of acting CEO. Fortunately, NSFRE Chair Marshall Monroe, the executive committee and other volunteers stepped up to help her. The next year, when president-

designate Ian Sturrock died just before he was to take office, Clarke continued to serve as acting CEO until his successor was hired. Finally, when Pat Lewis became president and CEO in March 1991, Clarke was able to return to her position as COO.

During the two-plus years of interim executive leadership, the committee structure continued to function and NSFRE continued to grow and add new programs. The NSFRE Research Council came into being, advancing one of the original goals of NSFRE, and the Skystone Ryan Prize for Research on Philanthropy and Fundraising was created. The Board Restructure Task Force was formed to address the challenge of reducing the NSFRE board to a manageable size, and the ethics committee undertook a revision and strengthening of the code of ethics.

Clarke had a good sense of humor and ability to relate to the volunteers on the board. She found plenty of opportunities to exercise both traits during that difficult time. Despite the tragedy of the loss of leaders and the strain on the small staff, Clarke managed to conduct two successful international conferences and keep board, staff and members satisfied.

John Lore, who was a vice chair at the time, said, "I don't know if AFP would be what it is today if it had not been for Gale. She was the mortar that held the society together at that time."





# Patricia F. Lewis, ACFRE

## AFP STAFF LEADERSHIP

### 1991–1998

**P**atricia F. Lewis was the first NSFRE volunteer officer to become president and CEO. She was the chair-elect and about to become chair when she was tapped to become the new president and CEO to succeed Dick Wilson. She was also the chair of the Board Restructure Task Force. She had organized the first NSFRE chapter in the state of Washington and was the CEO of the Seattle-King County Council of the Boys and Girls Clubs of America.

Her first goals were to ensure the board restructuring process was completed, see the code of ethics revised and enforcement procedures developed, strengthen the chapter structure and raise the quality of the professional education materials.

Lewis worked to complete and gain support from the board of directors and membership on the new governance recommendations. The governance proposals would create a board of 35 directors, four “metros” of chapters grouped by size and a National Assembly (later the Delegate Assembly) of representatives from each chapter. The board adopted the new structure in November 1991.

Lewis also pushed for restoring the prohibition against percentage-based fundraising to the new *Code of Ethical Principles*. When the Federal Trade Commission was considering applying the Sherman Anti-Trust Act to fundraisers, she went to the agency with Hank Goldstein and attorney Bruce Hopkins to explain that philanthropy and fundraisers are different from for-profit businesses and to make the case that NSFRE was capable of policing its members without government regulation. The *Code of Ethical Principles* was adopted in November 1991; the *Standards of Professional Practice*, with the prohibition against percentage-based fundraising, were adopted in 1992; and enforcement procedures were adopted in 1993. Lewis later said that enacting enforcement procedures was a pretty gutsy move.

In 1991 the Advanced Credential Task Force completed the written examination component of the advanced credential program. The first ACFRE examinations were administered in 1992, and the first credentials were conferred in 1993 to 18 individuals: Ted D. Bayley; Mary Anne Chern; C. Neal Davis, Ph.D.; John P. Demoleas; Lona M. Farr, Ph.D.; Simone P. Joyaux; Zoltan A. Karpathy; Barbara R. Levy; David J. Madson; William M. Moran; J. Russell Raker III; Charlotte Rhodes; Del Staecker; Dennis Stefanacci; Dana R. Todsen; B. Jeanne Williams; Karla A. Williams; and Marjorie A. Winkler.



Lewis and the CEOs of AAFRC, CASE and AHP worked out the wording of *A Donor Bill of Rights* and brought the document to life. The brainchild of Del Staecker, the document outlined for the first time 10 concise ethical rights that donors to nonprofit organizations should expect and receive. The four founding organizations adopted the document in November 1993 and were soon joined by the National Catholic Development Conference, United Way and more than two dozen other organizations. Today, *A Donor Bill of Rights* is used in countries around the world.

The professional advancement division developed and launched several new programs and projects during Lewis' tenure. In 1994, NSFRE established the publishing program with John Wiley & Sons. The society held the first Research Think Tank in 1995, and the following year published the first *NSFRE Fund-Raising Dictionary*.

# Paulette V. Maehara, CFRE, CAE

## AFP STAFF LEADERSHIP

### 1998–PRESENT

**P**aulette Maehara became AFP's president and CEO July 1, 1998, and has served in the position longer than anyone else. Already an NSFRE member and CFRE certified, she came to NSFRE from being CEO of the Epilepsy Foundation of America.

When Maehara came to NSFRE, she had to address financial and reporting issues, but the membership was healthy and growing. Her immediate priorities were to stabilize NSFRE's financial situation, develop an efficient and effective staff structure and assess progress toward implementing the new strategic priorities in the strategic plan. One of her first initiatives was to hire in-house legal counsel and establish a public affairs department to monitor government actions and strengthen NSFRE's relations with lawmakers, news media and the general public.

Other initiatives over the last 12 years have included diversifying AFP's revenue base, continuing the enhancements to the *Code of Ethical Principles*, furthering internationalization of the profession, publicizing the profession, strengthening AFP's role in the public policy arena, maximizing the association's use of technology to enhance member service and developing the membership growth strategy.

Maehara also has helped usher adoption of the AFP name change and governance revision and added senior professional staff for operations and other functional areas.

One of her proudest achievements is *The International Statement of Ethical Principles in Fundraising*. It took four years to create, beginning at the International Fundraising Summit instigated by AFP and first held in Toronto in 2003. The statement has been signed by fundraising organizations in 24 nations.

Maehara said her most difficult challenges have been the separation of CFRE certification and keeping AFP financially solid without cutting member services in the current worldwide economic recession. The recession has required AFP to spend down the board reserve assets and take painful cost-cutting measures—including suspending the employee 401(k) contribution, requiring staff furloughs and leaving vacant positions unfilled. She could not say enough about how the staff members have committed themselves to AFP, taken on extra work and pulled the association through the crisis.

Maehara's professionalism was recognized in 2005 when she was elected to chair the American Society of Association Executives (ASAE) in Washington, D.C. She has been listed as one of the *NonProfit Times*' "Power and Influence Top 50" for the past 10 years and was listed as one of the Five Most Successful Fundraisers in 2009.

She credits Ron Carroll for forging much of the staff and volunteer leader partnership that is embedded in the organizational culture, ensuring that both volunteer leaders and staff are always at the table. She said it is a hallmark of AFP.

What has she learned from dealing with fundraising organizations in other countries? "Humility—being part of the discussion, not leading it," she replied. "For the United States in the international arena, humility is more effective than bold action."



# *AFP Organizational Elements*

## GOVERNANCE

**A**FP's key governance challenge always has been how to provide representation of the chapters in a manageable manner. In the beginning it was simple—each chapter was entitled to a member on the board of directors. As the number and size of chapters grew, and larger chapters were allowed more than one member, this method of representation became unmanageable. As a result, the association has made substantial changes to its governing structure on four occasions.

The first board had 12 directors elected by the members at the first annual meeting held on Feb. 20, 1961. The bylaws authorized 25 directors, but 13 places were purposefully left vacant “to permit representation later on from other geographic areas and to increase the board in proportion to the increase in numbers.” In 1965 the bylaws were changed to make possible the creation and affiliation of chapters, and each chapter became entitled to three representatives on the board of directors.

By 1983, however, NSFRE had 49 chapters. The representatives of these chapters, plus 15 elected and three appointed members-at-large, along with 11 officers, brought the board to an unwieldy 173 directors. Once again the bylaws were revised, reducing the board to approximately 125 members, with provision for only nominal growth based on proportional representation based on the size of the chapter. The 1983 revision also changed the election of officers from the annual meeting held in the spring to the fall board meeting, with officers taking office the following January 1.

At first, the ability to pay for travel was a serious constraint for members who aspired to national leadership. Board meetings tended to last three or four days, and only those who were senior enough in their own companies or who could get their institutions to subsidize their travel were able to serve. Gradually as the chapters grew and became more financially stable, it became possible for most chapters to subsidize the travel of their board members to meetings.

By 1991, the board again grew difficult to manage, growing this time to more than 200 members, with an executive committee of 22 members that operated like a board of directors. After an extensive study by a Board Restructure Task Force headed by Pat Lewis, NSFRE again revised its bylaws to reduce the size of the board. This time it reduced the board to approximately 35 members proposed by the nominating committee and approved by the executive committee and board. The revision also created four “metro” groupings of chapters according to size, and a National Assembly composed of one to four representatives from each chapter based on the size of the chapter. The board of directors exercised all governing functions for the society, except for the National Assembly, which was entitled to elect one member of the nominating committee and was required to ratify all changes of dues, membership categories and bylaws.

At the urging of Canadian members, in 1982 the name “National Assembly” was changed to “Delegate Assembly,” reflecting the international makeup of the NSFRE membership.

In 1997, the nominating committee was renamed the Committee on Directorship and given additional responsibilities to monitor and evaluate the performance of the board of directors, as well as to recommend slates of nominees for directors and officers.

By 2004, AFP had more than a dozen chapters outside the United States and many such chapters in the development stages. It became evident that some different form of representation was needed to ensure that all regions and nationalities would be able to share in the governance of the organization. The board of directors appointed a Governance Task Force, chaired by immediate past chair Steve Batson, which studied a variety of proposals for more than a year and then vetted them extensively with the officers, board of directors, the Delegate Assembly and individual AFP members. The executive committee, board and Delegate Assembly approved the task force's recommendations in October 2006.

The new governance structure was as follows:

1. The Delegate Assembly was eliminated and a Chapter Presidents Council was created. The organization also created the Leadership Academy, an annual event that focuses on education and training for chapter leaders.
2. The composition of the board of directors was changed to include 12 district-based directors. Twelve geographic-based districts of approximately equal membership were created, with one director from each district elected to the board from a slate presented by the Committee on Directorship. Eighteen directors are elected at-large, two are chair's appointees and three are ex officio members (the president and CEO and the chairs of the ethics committee and ACFRE board). The officers of the board continue to be elected by the board members from a slate developed by the Committee on Directorship.
3. All members of the board are elected or reelected on an annual basis by a vote of the entire membership.
4. A Chapter Presidents' Council, consisting of the presidents of each AFP chapter, elects members of the Committee on Directorship. The presidents in each district vote for a member and an alternate to the Committee on Directorship. In addition, one member of the Council is nominated to serve a one-year term on the board of directors. The council serves as a forum for chapter presidents to discuss issues with association leaders throughout the year.
5. The Committee on Directorship continues to serve as the body that receives and reviews all board nominations. The committee is responsible for developing the slate of board members on which the entire AFP membership votes.

## CHAPTERS

The chapter structure that forms the core of AFP today was not envisioned at the organization's creation. Chapters were not mentioned in the first NSFR bylaws at all. Once introduced, however, chapters proved to be a flexible and effective way for fundraisers to network with each other, organize professional development programs and work together for the

needs of their local community. They also turned out to be a natural proving ground for leadership in the national organization. The chapter concept grew naturally because it worked.

Although the founders wanted to have a national organization, they quickly realized that meeting once a year at an annual meeting was not enough to create a viable professional society. In August 1963, Benjamin Sklar sent a detailed memorandum to the board of directors concerning a proposal that NSFR authorize the organization and development of local chapters, with the understanding that each would adopt requirements for membership.

Once the Association of Fund Raising Directors (AFRD) in New York came on board as a chapter (see page 6), the pattern was set. In February 1965, the NSFR board of directors adopted new bylaws making provision for the development of local chapters and their subsequent affiliation with the national organization. Each chapter was to have bylaws in conformance with those of NSFR and to have representation on the NFR board. Each local chapter member was to pay dues to the national organization—then \$10 per year!

To grow NSFR, it made sense to take advantage of existing local organizations and afford them the opportunity to affiliate nationally. Accordingly, the national organization began to recruit wherever there were already local groups and organizations of fundraisers. The Association of Fund Raising Directors of the National Capital in Washington, D.C., became the second chapter on May 14, 1965, and a group in Boston became the Massachusetts chapter in 1967. In 1968, Los Angeles and Houston (also encompassing Dallas, Fort Worth, Austin, San Antonio, and San Angelo) joined the organization. Thereafter, new chapters have been added to the roster each year.

The early chairs of NSFR made a practice of visiting all the chapters (traveling at their own expense in the 1960s and 1970s). The practice of chapter visits has been followed by chairs, officers and key staff ever since.

In 1979, NSFRE established the Chapter Presidents Council, with Barbara Marion as the first chair. The council proved to be an essential forum for the exchange of ideas among chapter presidents and the national organization, as well as an excellent vehicle for bringing chapter concerns to the attention of the national board.

Dick Wilson, NSFRE's first full-time paid president, did much to build the chapter structure in the 1980s. He traveled extensively to visit existing chapters and members in locations where there were none, identifying and encouraging local fundraisers to organize new chapters. He also led the development and publication of the first chapter leadership materials. He originated the "metro" concept by which chapters were classified into three like-size groups for the exchange of ideas and later for representation on the board of directors. From 1991 to 2006, there were four metro groupings for the exchange of ideas and for proportional representation in the Delegate Assembly.

In 1970, the Toronto Chapter, under the leadership of Barry Brooks, became NSFRE's first chapter outside the United States. In 1984, with NSFRE's blessing, Toronto was removed from the roster of chapters to become an independent, though still affiliated, organization, although it was welcomed back as a chapter in 1989. In 1993, the Mexico chapter (now the Mexico City chapter) was added, and since then, new Mexican chapters have been added in Monterrey, Baja California, Guadalajara, Chihuahua and Sinaloa. In Asia, there are chapters in Hong Kong, Singapore and Jakarta, Indonesia.

Collegiate chapters are the most recent addition to the chapter structure. Started in 2004, their purpose is to expose undergraduate and graduate students to fundraising as a profession, the importance of philanthropy and the vital role of ethics in professional practice. Each chapter is organized on a college campus and is affiliated with a local AFP chapter.

In 2007, in conjunction with the governance reorganization, AFP established the Chapter Leadership Academy.

At the beginning of 2010, AFP numbered more than 30,000 members in 207 chapters, including three chapters in Asia, six in Mexico, 15 in Canada and 183 in the United States. (See the Appendix for a complete list of chapters with the dates they were established.)

## ETHICS

**A**s ethical fundraising is essential for building the public trust on which philanthropy rests, a key mission of AFP is to advance and foster the highest ethical standards

in the fundraising profession. The fundamental goal of the *AFP Code of Ethical Principles and Standards* and enforcement procedures is to eliminate unethical behavior, not to impose punishment.

The need for a professional code of ethics was one of the original driving forces behind the formation of the National Society of Fund Raisers, and the code remains an essential core element of the organization today.

The original code was developed by a special committee chaired by Bernard M. Deutch and adopted by the board of directors in 1965. It contained most of the core principles found in the current code and served NSFR and NSFRE until the early 1990s.

One of the most important incidents regarding the code occurred in 1987. The NSFRE board was considering revoking the membership of a member accused of accepting percentage-based compensation, but legal counsel advised that taking such action would put NSFRE at risk of a legal suit or a restraint-of-trade sanction by the Federal Trade Commission. After much discussion, the board voted to suspend the code's prohibition against percentage-based fundraising. While this decision was greatly unpopular with many members the board felt the move was necessary to protect the organization.

This situation illustrated two points: 1) the passion and intensity members possessed about the code and its importance to their work and profession, especially with regard to compensation; and 2) the lack of enforcement procedures to ensure due process to persons accused of violating the code. To deal with the code's shortcomings, in 1990 NSFRE Chair Del Staecker appointed Hank Goldstein and a distinguished group of senior fundraisers—including Barbara Marion, Sarah Coviello, Bob Pierpont and Irwin Brod—to revise the code of ethics, create standards of professional practice that could be legally enforced and develop formal enforcement procedures. The revisions required almost four years to develop.

The committee first recommended an "aspirational" *Code of Ethical Principles*, stating what AFP members aspire to, which the board adopted in November 1991. Next, the committee recommended *Standards of Professional Practice* and guidelines for interpreting the standards, which among other things restored the prohibition against commissions and percentage-

based fundraising. The board adopted these in November 1992. The third step of the process, the creation of enforcement procedures, was completed under the chairmanship of Bob Pierpont and adopted by the board in November 1993.

The code has remained essentially intact since 1993. A few standards, several of the code's guidelines and a few enforcement procedures have been amended in the intervening years to clarify their meaning in light of changing business practices and to accommodate the code to AFP's growing international membership.

The most significant recent change occurred in 2007, when the board of directors adopted six new standards to govern ethical practices of AFP business members and their employees. At that time the code's name was changed to the *AFP Code of Ethical Principles and Standards*. Currently, the *AFP Code of Ethical Principles and Standards* applies to anyone who has sworn to uphold the code, which means members of AFP, employees of AFP business members and persons who hold an AFP-sanctioned professional credential.

The ethics enforcement process permits any individual to report an alleged violation of the code by an AFP member or other person subject to the code, by means of an ethics query or formal complaint. A query is a means for inquiring whether or not a practice warrants filing a complaint alleging a violation of the code and to request assistance from the ethics committee to resolve an issue or practice of concern. The process allows for the protection of the rights of both the complaining party and the accused.

Any individual, whether an AFP member or not, may file a formal complaint alleging ethical misconduct by a person subject to the code. The complaint must be in writing and signed by the complainant, using a form provided by AFP.

After a complaint is filed, the ethics committee will investigate the complaint to determine whether there is enough factual evidence to warrant a hearing. The committee will hold a hearing if necessary, at which the parties may be represented by counsel, and then will adjudicate the case. The enforcement procedures permit a variety of sanctions, the most severe of which is revocation of the CFRE credential and permanent expulsion from AFP. Expulsions are published in AFP and trade periodicals and listed on the AFP website.

AFP's ethics program extends well beyond merely enforcing the code on AFP members. In 1993, NSFRE, AHP, CASE and AAFRC issued *A Donor Bill of Rights*, which spells out principles that donors should expect from charities and is now used and cited around the world. AFP also helped propose and draft the *International Statement of Ethical Principles in Fundraising*, which organizations in 24 countries endorsed in 2006.

The top ethics priority today is educating members, nonprofit executives, lawmakers, regulators, donors, journalists and the public at large about ethical practices in nonprofit fundraising. In fact, the ethics committee spends a majority of its time providing advice and guidance on particular situations, and compensation remains, by far, the most queried issue. Another effort is the AFP chapter accord process, which requires chapters to hold at least one educational session on fundraising ethics each year.

AFP's ethics committee is the arbiter of the code, and its members conduct numerous presentations and workshops on fundraising ethics to chapters, international conference sessions and other organizations each year to help educate audiences about the code. The committee also supplies sample ethics programs and descriptions of sample ethics cases (with questions and answers about what to do) to all chapters. Currently the committee has commissioned an outside vendor to develop an ethics education curriculum for delivery via classroom and electronic instruction.

## CERTIFICATION

Professional certification is a hallmark of any profession and was a goal of NSFRE from the beginning. The founders felt that philanthropic fundraisers were viewed negatively by many people, and that without a credential for fundraisers who met professional standards, fundraising could not attain public recognition and acceptance as a true profession. However, a certification process required having a written body of professional knowledge, and that did not exist at the time for the profession. The only knowledge of the field was in the minds of various experienced practitioners.

Certification was a subject of serious discussion by the NSFRE board in 1970 and became the special priority of Lyle Cook, a member in San

Francisco. With the board's authorization, Cook led a committee that set out on the arduous road of gathering the body of knowledge and then writing an examination based on the body of knowledge. That, in turn, required developing educational materials to convey the body of knowledge and then a "train-the-trainers" program to prepare instructors. Thus, certification and education (later referred to as professional development) were closely intertwined from the start.

The first requirement for certification was that applicants have at least five years of experience as a full-time, paid fundraiser for a nonprofit organization.

In 1980, after nearly a decade of work by the committee, the Certified Fund Raising Executive (CFRE) program came into being, with Robert Pierpont as the first chair of the NSFRE Certification Board. In 1981, the first full year of the certification program, the CFRE credential was awarded to 166 professionals in the United States and Canada.

Next the board turned its attention to the possibility of an advanced credential for senior fundraisers. In 1985, the NSFRE board created a task force on advanced certification, which began a study to determine the extent of membership commitment to the development of an advanced credential beyond the CFRE. The task force surveyed NSFRE members and determined that an advanced credential was desirable, mostly for personal satisfaction and secondarily for professional advancement. The task force recommended creating an advanced certification credential, and work on the credential began in 1988.

Criteria were adopted—including 10 years of full-time fundraising experience, submission of a personal portfolio of work, and completion of an oral exam and a written exam. The board of directors authorized the ACFRE and the first written ACFRE exam was completed in 1991. The first exam was administered in 1992, and the first ACFRE credentials were awarded to 18 applicants in 1993. Barbara Levy was the first chair of the ACFRE board.

The next initiative in certification was to develop a "universal baseline credential." Because many NSFRE members were also members of the Association of Healthcare Professionals, and

members of the two organizations performed essentially similar duties, members of both organizations thought it would be useful to have a common professional credential. Discussions and negotiations between the leaders of the two organizations began in the mid-1990s. Among the difficult issues were whose code of ethics would apply and how it would be enforced. In the end, though, the negotiators agreed to use the NSFRE code. In 1996, the NSFRE and AHP boards agreed to merge their two certification processes. Later, several other philanthropic organizations joined in support of the independent credential for the fundraising profession.

The joint CFRE credential now existed, but was not yet accredited. When NSFRE and AHP sought accreditation, the accrediting authority required that the credential be administered by a body independent of the sponsoring organizations. So, to obtain accreditation for the credential, in 1999 the NSFRE and AHP boards proposed to split off the CFRE board into an independent organization.

The move was highly controversial. Many of those who favored the separation (including some outside of NSFRE) felt that accreditation would increase the prestige of the credential. Many also felt that this move would help attract more applicants for the CFRE. Opposed to separation were members who felt that the CFRE had been created by NSFRE, was largely supported by NSFRE and therefore should remain under the jurisdiction and control of the NSFRE board. Others were concerned that an independent organization would not be able to generate enough revenue to support itself with significant assistance from other organizations.

Finally, in 2001, the two organizations created the CFRE Professional Certification Board (now CFRE International) as an independent 501(c)(6) organization dedicated to "setting standards in philanthropy through a valid and reliable certification process." After the formation of CFRE International, other philanthropic associations joined in support of the program.

Because of funding and other problems, the accreditation process took longer than the five years originally envisioned. However, in February 2009 accreditation was awarded, and a fully accredited CFRE administered by CFRE International came into being.

## PROFESSIONAL ADVANCEMENT

Always one of AFP's most important services to members, the professional advancement program has been in continual evolution since the beginning of NSFR. The first professional advancement activities were simply educational sessions at the annual conferences on fundraising techniques and ethics. As chapters developed, they added professional educational sessions to their monthly luncheon programs. With the development of the CFRE credential, certification drove professional advancement with the development of the First Course in Fund Raising and the Survey Course in Fund Raising.

However, education for certification is not the only purpose of AFP's professional advancement program. The program also includes training for advanced professionals, executive leadership and various areas of management. It includes chapter education, classroom instruction, printed training materials, courses delivered on compact discs and, increasingly, online instruction via Audio/Web-conferences and online courses.

In the beginning there was no curriculum or training materials. The first codification of effective fundraising principles and practices came from Jack Schwartz, CEO of the Association of Fund Raising Directors in New York City, and these formed the basis of NSFR's first educational curricula.

Following are some milestones in the development of AFP's professional development program:

- 1963 First annual conference (later called international conference)
- 1969 First multiday annual conference with multiple education sessions (including "The Pitfalls and Pleasures of Building a Development Staff from Scratch," "How to Steal a Good Idea" and "Getting Your Governing Board Off Dead Center and More")
- 1972 Work begun to create the CFRE credential
- 1977 First issue of *NSFRE Journal* published
- 1981 First CFRE credentials awarded
- 1981 Survey Course developed (later called CFRE Review Course)
- 1983 First conference for senior fundraisers held (Princeton, N.J.)
- 1984 First Course developed (later developed into the Fundamentals of Fundraising Course)
- 1987 Development of an advanced fundraising credential authorized by NSFRE board; Think Tank on Education held
- 1989 First Executive Leadership Institute held (Indiana University)
- 1990 Research Council formed
- 1993 First ACFRE credentials conferred
- 1994 Publishing program with John Wiley & Sons established
- 1996 First *NSFRE Fund-Raising Dictionary* published
- 1998 First Executive Management Institute held (Vanderbilt University)
- 2000 First AFP Audioconference broadcast; first Faculty Training Academy held
- 2001 Online First Course developed
- 2002 Practice analysis completed; first *Ready Reference* guide published
- 2003 New *AFP Fundraising Dictionary* made available online
- 2004 Online CFRE Review Course developed; AFP Curriculum Framework developed; First AFP Faculty Training Academy (FTA) held in Canada (in cooperation with the Mount Royal College Institute of Nonprofit Studies in Calgary, Alberta).
- 2005 Fundraising Essentials program launched; First Hemispheric Congress on Fundraising—Latin America
- 2006 Collaboration with Tec de Monterrey Social Leaders Program (online fundraising basics course developed); Fundraising Effectiveness Program established; Ethics Think Tank held
- 2007 First AFP Leadership Academy conducted; first Nonprofit Management Institute held (Stanford University); AFP Learning Center opened; Higher Education Task Force formed
- 2008 First Supply & Demand of Philanthropy conference held (Boston College)
- 2009 CFRE Review Course revised around domains of the CFRE exam
- 2010 First Fundamentals of Fundraising course offered



## GOVERNMENT RELATIONS

Government relations has sometimes been a sensitive topic for the organization. For a long time, most members considered lobbying an inappropriate activity for philanthropic fundraisers. However, over the years U.S. federal and state lawmakers and officials made recurring efforts to regulate philanthropic fundraising and enact policies—primarily through the tax laws—that would have the effect of curtailing philanthropy. Despite the wishes of some members, NSFRE found it necessary to become involved in government relations to educate lawmakers and regulators about the benefits to society made possible by voluntary philanthropy and the key role that philanthropic fundraisers play in making that happen. The history is one of gradually increasing government involvement in the United States and, more recently, in Canada. Now, a large majority of members value the role of AFP in legislative and regulatory affairs.

One of the first forays into government relations occurred during Byron Welch's term when he and others attempted to organize a study of fundraising costs because some state attorneys general were pursuing this question. Welch's plan was to work with representatives of the National Association of Attorneys General and the American Institute of Certified Public Accountants to identify and make public the costs of fundraising. However, the study (and similar efforts later) was never able to pin down the costs definitively.

When NSFRE's division structure was created in 1977, the board created a legislative committee within the new public affairs division—first headed by Hank Goldstein and later by Bob Trefry and Jim Greenfield—and issued its first formal advocacy statement in favor of the Fisher-Conable bill (which would have allowed every taxpayer, including nonitemizers, to deduct religious and other charitable contributions on their income tax return). Under this committee's leadership, NSFRE began to establish a network among the chapters to alert them to pending federal and state legislation of importance to fundraisers, and NSFRE began sending a representative to meetings of the state attorneys general.

In 1985, NSFRE, along with NAHD and Independent Sector, co-hosted "Capitol Hill Day," a conference "to plan strategies about current and future threats to the favorable tax status afforded

to nonprofit organizations and their contributors." Discussions from the conference helped guide AFP's legislative work for several years thereafter.

When the Federal Trade Commission (FTC) was considering applying the Sherman Anti-Trust Act to fundraisers in 1991, Pat Lewis, Hank Goldstein and attorney Bruce Hopkins went to the FTC. They explained why the reasoning for the prohibition against percentage-based fundraising made sense in the philanthropic sector and to make the case that NSFRE was capable of policing its members without government regulation.

In 1992, Charles Stephens, Bill Moran and Pat Lewis testified before the House Ways and Means Committee, the Internal Revenue Service and the Federal Accounting Standards Board on proposed legislation affecting philanthropy and fundraising.

When Paulette Maehara became president and CEO of NSFRE in July 1998, one of her key priorities was public policy and advocacy. She created a new public affairs department to oversee the association's legislative, regulatory and public relations efforts. She also hired AFP's first in-house legal counsel and its first professional public relations director.

AFP took an even bolder step into government relations in 2002. Under the leadership of External Relations Vice Chair Tim Burcham, the AFP board of directors approved the creation of the Association of Fundraising Professionals political action committee (AFP PAC)—also known as the "Philanthropy PAC"—as a separately incorporated organization. Because U.S. law forbids AFP from making political contributions, the separate PAC enables U.S. members to donate money for the electoral campaigns of U.S. candidates who take favorable positions on issues related to philanthropy and fundraising. A seven-member board directs the operations of AFP PAC, which is managed by the Public Affairs staff. Members outside the United States are not allowed donate or otherwise get involved in the PAC.

AFP continues to work with and educate lawmakers and regulators in the United States and Canada on a regular basis. Examples of AFP legislative impact in recent years include:

- The IRA Rollover provision passed in 2006 as part of the Pension Protection Act of 2006. The provision was extended in the economic stimulus package that was passed in the fall of 2008.

- The Canadian government eliminated the capital gains tax on gifts of listed securities in 2006.
- In Dec. 2007, the IRS introduced a redesigned Form 990 and Schedule G (for fundraising) that incorporated many revisions and recommendations submitted by AFP (and others).
- In June 2009, the Canada Revenue Agency released a revised and final version of its Policy on Fundraising. This new version was quite different in tone and substance from the original draft and incorporated many suggestions raised by AFP and a coalition composed of Imagine Canada, Health Charities Coalition of Canada and numerous other organizations.
- Several versions of a proposal to reduce the value of the charitable deduction for high-net-worth donors were introduced throughout 2009 and 2010, but continue to be defeated so far by a coalition of organizations, including AFP.

One of the biggest AFP successes in government relations recently occurred in Canada. On Oct. 27, 2009, in response to requests by AFP chapters and members in Canada, the Minister of Canadian Heritage declared Nov. 15, 2009, as National Philanthropy Day in Canada. The declaration made Canada the first country in the world to establish permanently National Philanthropy Day as an official celebration every year.

## RESEARCH

**T**he founders of NSFR viewed scientifically based information as a necessary component of a true profession, and research was consequently one of the first purposes of NSFR. Before the society's formation, there was little scholarly research on philanthropy and fundraising. Over the years, AFP has undertaken and sponsored a growing number of projects and programs to build the base of scholarly research. In addition, the growth of universities offering programs in the field have also accelerated this trend.

In the mid-1970s, when state attorneys general were interested in investigating fundraising costs, NSFR attempted a research project to identify the "true costs of fundraising." The project was made possible by the sponsorship and fundraising efforts

of the NSFRE Institute. Byron Welch's vision was to work closely with the National Association of Attorneys General and the American Institute of Certified Public Accountants. After several years of effort, the project foundered and had to be abandoned.

AFP has worked with other organizations on various fundraising cost studies throughout the years, developing a view that one specific fundraising cost limit is simply impractical and impossible to identify. However, in conjunction with other groups, has developed guidelines on how charities and donors can address fundraising costs and answer the question of "what is the true cost of fundraising."

In 1985, NSFRE began publishing a semiannual *Profile* career survey showing the career status and compensation of members. Today, AFP collects data on members' salaries and benefits and publishes the results annually in the *AFP Compensation and Benefits Study*, known throughout the sector as the leading research on fundraiser salary levels.

NSFRE established the annual Skystone Ryan Prize for Research on Philanthropy and Fundraising in 1989 (then the Staley-Robeson-Ryan-St. Lawrence Research Award). Each year the Research Council Prize Jury selects the author of a book that advances knowledge of fundraising and philanthropy. The winning author receives a \$3,000 award made possible by Skystone Ryan Inc.

In 1990, NSFRE created the Research Council, composed of researchers with advanced degrees, to plan and guide NSFRE's research efforts. From the council came the society's first Research Think Tank in 1995 to identify research needs and opportunities for the profession. The annual think tanks have continued into the new millennium. Beginning in 1996, NSFRE began awarding minigrants of up to \$5,000 for research projects on topics related to philanthropic giving and other fundraising needs identified by the Research Council.

In the wake of tragic events of Sept. 11, 2001, AFP began to conduct an annual *State of Fundraising* survey. The survey compares fundraising results from year to year based on a variety of different methods, including direct mail, major gifts, planned giving special events and online solicitations. AFP also conducts the

*Holiday Giving* survey in the all-important final quarter of each calendar year. These surveys have allowed AFP to provide detailed analysis of the fundraising environment and metrics for charities to benchmark their results against other organizations.

In 2005, the AFP Research Council, in partnership with Legacy Leaders, began a five-year program that offers grants of up to \$10,000 annually to individuals who wish to undertake research projects related to planned giving. Three major research projects were funded related to planned giving and how fundraisers can better reach out to donors about making a planned gift.

AFP began publishing survey findings in 2007 from the Fundraising Effectiveness Project (FEP), which seeks to help nonprofits increase giving at a faster pace. The *Fundraising Effectiveness Survey* measures growth in giving from year to year by examining gains and losses in different categories (e.g., new or lapsed donors) and determining in which areas charities can most improve. Organizations can then compare their fundraising performance to that of other organizations by total amount raised, type of organization, age of development program and geographic location, as well as combinations of these criteria. The FEP is sponsored by AFP and the Center on Nonprofits and Philanthropy at the Urban Institute in Washington, D.C., as well as the Council for Advancement and Support of Education (CASE), Council for Resource Development (CRD), the Center on Philanthropy at Indiana University, Partnership for Philanthropic Planning (formerly National Committee on Planned Giving) and the Association of Donor Relations Professionals (ADRP). In addition, the software community is helping the project by assisting their clients with extracting the needed data from their donor databases.

## DIVERSITY

**A**FP has long espoused advancing ethnic, cultural, and gender diversity in the membership and in the fundraising field. One of the three original founders, Bill Simms, was African American, and the original board of directors included religious diversity and at least one woman, Emily Klinkhart, who was an officer (secretary). Nevertheless, reflecting the field at the time, women and members of ethnic

minorities were a small percentage of the overall membership and leadership of the organization in the beginning. More than 20 years elapsed before NSFRE established an organized effort to recruit members from diverse communities.

Over the years, several NSFRE and AFP chairs have placed special emphasis on advancing diversity. Barbara Marion, the first woman to serve as chair of both NSFRE and the NSFRE Foundation, formed a minorities task force in 1985 to address the participation, advancement and service of minority fundraising professionals. The task force evolved into the diversity committee that continues today.

Charles Stephens became the first African-American chair of the society in 1992. He was the first chair to place major emphasis on recruiting minority members to the profession and getting more women involved in leadership. He visited many chapters and carried this message in every presentation. AFP's award that honors outstanding work by a chapter in the area of diversity is called the Charles R. Stephens Excellence in Diversity Award in his honor.

When Steve Batson became AFP chair in 2001, one of his three major goals was "to ensure that AFP is a diverse organization." Besides encouraging the initiatives of the diversity committee, he urged all chapters to have diversity in their membership, officers and boards of directors. The board passed a resolution declaring "AFP is committed to diversity as an ongoing proactive process in its governance, chapters, committees, membership, programs and activities." Chapters were then required to have a diversity chair, and the first Diversity Art Showcase was featured at the 2002 International Conference on Fundraising. It has since become a regular feature at all conferences.

Alphonse Brown, AFP's second African-American chair, also promoted diversity in the organization. Under his leadership, AFP conducted a diversity summit in 2005 attended by the heads of 19 national fundraising, minority, and philanthropic organizations. The summit addressed the following questions:

- How can the fundraising profession better serve underrepresented communities?
- How do we increase the participation by underrepresented communities in the fundraising profession?

- How do we improve access to formal/informal education or mentoring in the fundraising profession within underrepresented communities?

The summit served as the beginning of a larger discussion on diversity within the nonprofit sector, and recommendations from the summit continue to guide AFP's diversity work.

In 2006, Brown revived as an e-newsletter the *Kaleidoscope* print newsletter that he had started as chair of the diversity committee in the late 1990s (writing and typing it himself). AFP's fundraising newsletter in Spanish, *Te Informa*, as well as its *Chapter Diversity Resource Guide*, was created that same year.

In the 2007–2010 strategic plan, AFP declared that it “will embrace and engage diverse individuals, groups and organizations within the fundraising profession” as one of its six major goals. Toward that goal, AFP established the Diverse Communities program to enable various self-identified groups to create communities within AFP both online and in person to network and learn from one another. The program provides opportunities for members from diverse backgrounds to connect with one another while remaining part of the overall association as a whole.

In 2008, AFP established the Friends of Diversity designation, recognizing chapters that have accomplished many of the key objectives outlined in the diversity goal of the strategic plan. All chapters that accomplish certain diversity criteria every year can apply to receive the designation.

While several chapters have received the Charles R. Stephens Award for Excellence in Diversity for their tremendous efforts in diversity, the AFP Greater Philadelphia's work stood out. Its Color of Money conference in 2009 attracted fundraisers from diverse background from as far away as Texas and Michigan. The chapter received the diversity award in 2010, and the Color of Money program is being developed as a model for other chapters.

## PUBLIC RELATIONS AND AWARDS

Until the late 1990s, NSFRE's public relations were handled by the volunteer leaders and chief executive. In 1997 NSFRE hired a full-time public relations professional and established a more organized public relations program.

In addition to issuing and posting news about AFP and philanthropy to internal and external audiences, the public relations program provides extensive public relations materials to chapters for National Philanthropy Day (NPD) each year and promotes national and local news coverage of NPD.

The public affairs department speaks to hundreds of reporters every year and ensures that AFP is covered in thousands of articles in countries worldwide. AFP is regularly contacted by some of the most well-known media outlets in the world for stories relating to fundraising, giving, volunteering and philanthropic trends—ethics, especially percentage-based compensation and fundraising—remain the most popular issues every year.

## NATIONAL PHILANTHROPY DAY®

National Philanthropy Day®, which is now an international celebration, was the brainchild of Douglas Freeman, J.D., LL.M, the founder of IFF Advisors. He felt that “as fundraisers, we don't say ‘thank you’ enough to all the people who support the nonprofit sector in so many ways.” In 1981 he wrote to President Ronald Reagan's chief of staff, Ed Meese, proposing that the government declare a national day to recognize the great work that individuals and organizations involved in philanthropy perform every day. The White House replied in 1982 that for President Reagan to endorse the idea, it would need congressional approval.

So NSFRE, Freeman and other top leaders of the nonprofit sector formed a 29-member national organizing committee to try to get the necessary legislation passed and signed. “At the time, it wasn’t all that exciting to people, and it required a lot of hard work,” committee member Milton Murray recalled in 2006. In addition to lobbying and writing thousands of letters, the committee had to raise \$250,000 a year to fund the effort. After a five-year effort, in 1986 the legislation passed Congress and President Reagan signed the proclamation declaring November 15 as National Philanthropy Day®. Since that signing, numerous state, provincial and local governments have also produced proclamations about National Philanthropy Day.

On Oct. 27, 2009, the Minister of Canadian Heritage declared that Nov. 15 would be celebrated every year as National Philanthropy Day® in Canada. The declaration made Canada the first country in the world to permanently recognize the day.

Today National Philanthropy Day® is celebrated by thousands of people in communities not only in the United States, Canada and Mexico, but also in other countries throughout the world.

## PHILANTHROPY AWARDS

The Awards for Philanthropy program is one of AFP’s best-known and most effective public relations activities. The awards recognize individuals and organizations whose achievements have made an impact on society, nationally and internationally.

The forerunner of the awards program was the “Pantheon of Philanthropy,” started by the Delaware Valley (now Philadelphia) Chapter and adopted by NSFRE under the leadership of Byron Welch in 1976. The Pantheon honored an outstanding philanthropist each year. In 1980, led by Sarah Coviello, NSFRE restructured and expanded the Pantheon to create the current Philanthropy Awards program. The first awards honored the Outstanding Philanthropist, Outstanding Foundation, Outstanding Volunteer Fundraiser and Outstanding Professional Fundraiser. Later the category of Outstanding Corporation was added.

The most recent addition to the Philanthropy Awards program is the Bill Simms Award for Outstanding Youth in Philanthropy. Named in honor of one of AFP’s co-founders, this award is presented in two categories for youth, ages 5–17 and ages 18–23, who have exhibited outstanding initiative in philanthropy.

Currently three of the philanthropy awards are named for AFP member-sponsors who underwrite the awards: the Freeman Philanthropic Services Award for Outstanding Corporation, the CCS Award for Outstanding Fundraising Professional and the Changing Our World/Simms Award for Outstanding Youth in Philanthropy.

AFP also presents other awards, including:

- Campbell and Company Awards for Excellence in Fundraising, given to nonprofit organizations’ development departments or fundraising programs for innovative and outstanding practices. Two awards are given each year, one to a small organization and one to a large organization.
- Barbara Marion Award for Outstanding Leadership to AFP, named in honor of AFP’s first female chair, this award is presented each year to a volunteer who has provided outstanding service to the association.
- Skystone Ryan Research Prize for Fundraising and Philanthropy. Sponsored since 1989 by the Skystone Ryan company, this prize is awarded to the author of a book that contributes substantially to the knowledge and understanding of fundraising or philanthropic behavior.
- Charles R. Stephens Excellence in Diversity Award, which honors the year’s most outstanding demonstration by an AFP chapter of leadership, creativity and initiative in building diversity in membership or programming.
- Chapter Ten Star Award, which recognizes chapters that have accomplished many of the key objectives outlined in the AFP strategic plan. The award encourages chapters to perform specific activities designed to increase professionalism within fundraising and public awareness of philanthropy.

## INTERNATIONAL RELATIONS

**N**SFR's involvement in international relations came early. In 1967, NSFRE members associated with the fundraising consulting firm Wells Organization Pty. Ltd., in Melbourne, Australia, began talking about forming a chapter there. In 1970, the Ontario Chapter, now the Greater Toronto Chapter, became one of the first NSFRE 13 chapters and the first chapter outside the United States. In 1979, the NSFRE board held a meeting in Guadalajara, Mexico, at the invitation of Mexican fundraisers and the Mexican government.

AFP's relations with organizations of fundraisers in other countries have tended to be cumulative and continuing over time. Starting with Dick Wilson's visit to the UK in 1987, NSFRE had a continuing relationship with the International Conference of Fundraising Managers, led by its CEO, Stephen Lee. In 1990 and for several years afterward, Del Staecker represented NSFRE to the organization.

AFP's international activity has grown greatly since 1995, especially in Canada, where AFP membership now exceeds 3,200 members in 15 chapters. Much of the international growth has been based on groundwork laid by Penny Scarpucci, Phil Schumacher and Ron Carroll in the 1990s and early 2000s.

Carroll advocated allowing substantial local autonomy and various degrees of affiliation with AFP for fundraisers and fundraising organizations in other countries, and this approach has stood AFP well. It enables local fundraisers to have access to AFP resources and the body of knowledge in the manner that best fits the circumstances and culture of their own country.

The spirit of this approach can be seen in the *International Statement of Ethical Principles in Fundraising*. Advocated by AFP, the Fundraising Institute of the UK and the Fundraising Institute of Australia—and four years in the making—the statement is, in essence, a universal code for fundraisers regardless of where they work. The statement recognizes that the fundraisers are subject to many different jurisdictions, and that they must observe the law of the jurisdiction in which they work. The statement is intended to express overarching principles and to sit with,

rather than supersede, existing national codes of ethics. The statement addresses five universal principles and six areas of practice:

**HONESTY:** Fundraisers shall at all times act honestly and truthfully so that the public trust is protected and donors and beneficiaries are not misled.

**RESPECT:** Fundraisers shall at all times act with respect for the dignity of their profession and their organization and with respect for the dignity of donors and beneficiaries.

**INTEGRITY:** Fundraisers will act openly and with regard to their responsibility for public trust. They shall disclose all actual or potential conflicts of interest and avoid any appearance of personal or professional misconduct.

**EMPATHY:** Fundraisers will work in a way that promotes their purpose and encourage others to use the same professional standards and engagement. They shall value individual privacy, freedom of choice and diversity in all forms.

**TRANSPARENCY:** Fundraisers stimulate clear reports about the work they do, the way donations are managed and disbursed and costs and expenses, in an accurate and comprehensible manner.

### THE SIX STANDARDS OF PRACTICE ADDRESS:

1. Fundraisers' responsibility regarding donations
2. Relationship with stakeholders
3. Responsibility for communications, marketing and public information
4. Management reporting, finance and fundraising costs
5. Payments and compensation
6. Compliance with national law

AFP places considerable importance on developing a common baseline of ethics across national boundaries because fundraising and giving are becoming transborder, transnational activities. In 1995, AFP began a more focused and systematic delivery of programs, through partnerships and collaborations, in many countries around the world. The association has delivered educational initiatives in Asia, Africa and Latin America; advised on the development of regulatory

structures in Asia and Brazil; introduced new forms of membership designed to make AFP accessible to all; and developed web-based resources to provide maximum benefit to fundraisers wherever they are.

The following are some key milestones in AFP's international relations work:

- 1970 Ontario Chapter (now Greater Toronto Chapter) established
- 1993 Mexico Chapter, now the Mexico City Chapter, established
- 1995 Canadian Initiative Task Force formed
- 1999 AFP Foundation for Philanthropy–Canada created
- 2003 First International Summit on Fundraising held in Toronto, Canada, with 23 representatives from 19 countries
- 2004 Second International Summit on Fundraising held in Amsterdam, The Netherlands, AFP China, Hong Kong Chapter established, Strategic alliances formed with the Institute of Fundraising (UK) and the Fundraising Institute Australia
- 2005 First Hemispheric Congress–Latin America organized by AFP and held in Mexico City, Third International Summit on Fundraising held in London, United Kingdom, Strategic alliance established with the Fundraising Institute of New Zealand
- 2005 AFP Singapore Chapter and AFP Indonesia, Jakarta Chapter established, Strategic alliance established with the Dutch Fundraising Association
- 2006 AFP governance structure revised, with a worldwide geographic district structure, Fourth International Fundraising Summit held in Noordwijkerhout, Holland; 24 countries ratify the *International Statement of Ethical Principles in Fundraising*, Collaboration with Tec de Monterrey Social Leaders Program in Mexico established
- 2007 First AFP Fundraising for Higher Education Congress in Sao Paulo, Brazil, in conjunction with the Faculty of Rio Branco and supported by the Brazilian Minister for Education and the US Consulate.
- 2008 Fifth International Summit on Fundraising held in San Diego, California, E-global membership launched
- 2009 Fifth Hemispheric Congress organized by AFP and Faculdades Integradas Rio Branco held in São Paulo, Brazil, Symposium on the Comparative Regulation of Nonprofits held in São Paulo, Brazil, Strategic Alliance formed with the Deutsche Fundraising Verbandt
- 2010 Sixth International Summit on Fundraising in London, United Kingdom, Sixth Hemispheric Congress on Fundraising in Monterrey, Mexico

## *The AFP Foundations*

**A**FP has two philanthropic foundations: the AFP Foundation for Philanthropy in the United States and the AFP Foundation for Philanthropy–Canada.

The AFP Foundation for Philanthropy was created in 1973 to provide a means to receive voluntary contributions and grants in support of educational, research and other projects to advance ethical and effective fundraising. The founding president was W. Homer Turner, Ph.D.

Initially named the NSFRE Institute of Continuing Education and referred to as “NICE,” it was incorporated in the District of Columbia on April 2, 1981, with Ralph Chamberlain, Robert Pierpont and Byron Welch as the incorporators. It was granted tax-exempt status as a 501(c)(3) organization from the Internal Revenue Service in April 1982. On April 28, 1987, the name of the corporation was changed to National Society of Fund Raising Executives Foundation, and on March 12, 2001, the name was changed again to AFP Foundation for Philanthropy.

At first, the institute focused on funding educational sessions at annual conferences. It was a vehicle for receiving grants and some donations, but its active fundraising activities were limited. In the early 1980s, Charles Lawson took the lead to revitalize the organization. The mission and responsibilities were clarified, an annual “Every Member Campaign” was established and more

active solicitation of member donations was begun. Lawson also introduced the idea of “donor clubs,” the institute’s first donor-recognition program. In these years the staff was largely provided or subsidized by NSFRE/AFP. In 2004, the foundation was revised again to become a self-sufficient organization, and in 2005 the foundation hired Curtis C. Deane, CFRE, CAE, to become its president.

Since 1973, the AFP Foundation for Philanthropy has raised more than \$17 million in support of programs that train and educate professional fundraisers, expand and deepen the knowledge underlying fundraising and increase public awareness and understanding of ethical fundraising. One notable program is the Chamberlain Scholarships, funded by an endowment from former chair Ralph Chamberlain, which enable chapters to provide a stipend for worthy members to attend the international conference.

In 1998, AFP established the AFP Foundation for Philanthropy–Canada, making it possible for Canadian members to obtain tax deductions for donations for education and research activities in Canada. Since then, the foundation has raised more than CDN\$70,000 each year and has supported scholarships for chapter members to attend educational sessions, a survey of fundraisers and translations of AFP professional advancement courses from English into French.



# *AFP Looking Forward*

**L**ooking forward, AFP has initiated several interrelated projects to launch its next decade and lead the field of fundraising further toward the goal of being a true profession conducting ethical fundraising practices in support of philanthropy.

## ENSURING APPROPRIATE BASELINE KNOWLEDGE

With fundraising now being recognized by students and the public as a career, and colleges and universities offering courses, certificates and degree programs in fundraising and nonprofit management, a major new challenge for AFP is how to ensure new people continue to enter the field with the appropriate knowledge and skill sets. There is no standardized set of competencies that institutions of higher learning have agreed upon when teaching their fundraising courses. Therefore, it is very possible that newcomers to the field may have degrees in fundraising but have substantially different skills and knowledge and differing levels of awareness about important issues such as ethics.

Tim Burcham established the Higher Education Task Force in 2008 to study the rapidly growing educational offerings of colleges and universities, evaluate how well they align with AFP's professional development curricula, and recommend how AFP can most productively work with these institutions to ensure newcomers to the field have the necessary skills and knowledge. The task force has provided its recommendations, and AFP is now developing action plans to implement some of them.

## FUNDRAISING AND NONPROFIT REGULATION

The current recession and level of public debt has placed unprecedented pressure on governments at all levels to find ways to fund their operations and programs. In their search for revenue sources, some lawmakers are enormously tempted to close tax deductions, including those for charitable giving. Others are looking at taxing charities—or using “payments in lieu of taxes”—to extract additional money to relieve local funding pressures.

Consequently, it will be more important than ever for AFP to inform lawmakers, the news media and the general public about the invaluable cultural and social benefits and multifold return on investment that philanthropic giving makes to our communities and the world. Although not new initiatives, the AFP government relations program and political action committee are destined to be crucially active in the coming decade.

## TOMORROW'S LEADERS

As the number of nonprofit organizations continues to grow, and as fundraisers and nonprofit executives in the baby boomer generation retire, a significant leadership gap will occur. Estimates conclude that hundreds of thousands of positions will need to be filled in the next 20 years, and there are serious concerns whether the profession and the sector will possess the numbers—and the executives with appropriate skills—to adequately lead the sector into the future. One of AFP's key future goals will be to identify, attract and train the next generation of fundraising leaders and nonprofit executives, since nearly 25 percent of AFP's members serve in an executive leadership position at their organization.

## VALUE AND RELEVANCY OF MEMBERSHIP

The fundraising landscape changes continuously. To best serve the profession, AFP must remain relevant and provide the best quality and value of programs and services to practitioners regardless of organization, specialty, etc. In the past, AFP has been nimble and prepared enough to respond to changes in the environment by creating new membership categories for students and for-profit businesses involved with fundraising and philanthropy, and by providing new programs to help fundraisers address the challenges of the recent economic recession. With the profession continuing to splinter into specialties, the rise of technology and a fluctuating economy, AFP will have to pay even closer attention to changes and new trends to ensure that it is providing the most appropriate and useful services in the most effective and efficient manner.

## TECHNOLOGY

Technology presents both opportunities and challenges for the profession. On one hand, technology is allowing for greater access to donors around the world, more effective and efficient internal systems and storage of data, increased possibilities for personalization and faster processing. On the other hand, the increasing use of technology is not a replacement for stewardship and relationship-building. While new ways of giving such as cell phone texting are faster than others, they also may be increasingly impersonal unless the fundraiser is able to be proactive in furthering the connection between the donor and the charity. In addition, for-profit use of technology will drive donor expectations about how charities employ technology, pressuring fundraisers even more to keep up with new trends and changes while keeping their focus on stewardship.

## CREDENTIAL AND ACADEMIC QUALIFICATIONS

A universal credential for philanthropic fundraising has long been seen as a requirement to be a true profession, in the way that doctors, attorneys, accountants and other professionals are. The recent accreditation of the CFRE credential is a step toward that goal, and efforts will continue to strengthen and expand the CFRE toward being a truly universal credential.

Another step toward the goal of a true profession is the new academic qualification in fundraising developed in partnership with the Center on Philanthropy at Indiana University and slated for launch in January 2011. This will be the first academically rigorous qualification to be offered to the profession.

## INTERNATIONAL INITIATIVES

The growth of philanthropy and voluntarism in the international sphere is skyrocketing. The interest shown by citizens and government leaders in Latin America, Asia and Europe is enormous. At the same time, philanthropy is becoming more global, crossing national boundaries to tackle health, education and social needs in many developing countries and countries beset by war and natural disasters. Because of the body of knowledge AFP has accumulated over its 50-year history, fundraisers in many other countries look to the association for information and advice.

AFP will continue to work with international fundraising organizations in whatever sort of partnership or collaboration is best for that country, region or organization. Cultural and language issues may present challenges, especially as fundraisers in certain countries require more specific fundraising materials. However, past achievements such as the International Statement on Ethical Principles demonstrates that remarkable progress is possible in this area so long as AFP continues to position itself as an active participant, but not a demanding leader, in the evolution of philanthropy around the world.

## DIVERSITY

AFP and the fundraising profession will have significant challenges in the area of diversity in the future.

First, the profession will have to continue to address the growing diversity of donors and their changing demographics. Being able to reach out to new groups of donors in a meaningful and inspired way will be critical to fundraisers' success, and AFP will need to develop programs and resources that assist practitioners in this area.

Second, AFP will need to work to encourage more individuals from diverse backgrounds and under-served populations to enter the fundraising profession. AFP has stepped up its efforts over the past several years, but significant progress must be made, especially for the profession to be more representative of the people it is serving.



Above: Debuting in Baltimore at AFP's 47th International Conference on Fundraising and 50th Anniversary Celebration, the AFP Anniversary Retrospective, created by One of a Kind Inc.

Art Studio, provides a comprehensive graphical history of AFP. To see a larger and interactive retrospective, visit the AFP website at <http://www.afpnet.org/content.cfm?ItemNumber=2917>.

# Appendix

## AFP 50TH ANNIVERSARY TASK FORCE

Henry (Hank) Goldstein, CFRE (Chair)  
*New York, N.Y.*

Steve W. Batson, Ed.D., CFRE  
*Albany, Ga.*

Alphonse J. Brown Jr., ACFRE  
*Washington, D.C.*

Donald A. Campbell Jr., CFRE  
*Wilmette, Ill.*

Gary L. Good, CFRE  
*Irvine, Calif.*

John W. Hicks, CFRE  
*New York, N.Y.*

Claudia A. Looney, FAHP  
*Los Angeles, Calif.*

Sen. Terry M. Mercer, CFRE  
*Ottawa, Ontario*

Marshall Monroe  
*Columbus, N.C.*

William M. Moran, FAHP, ACFRE  
*Birmingham, Ala.*

Barbara H. Mulville, CFRE  
*New Bedford, Mass.*

Colette M. Murray, J.D., CFRE  
*Indio, Calif.*

Thomas G. Sanberg  
*Chicago, Ill.*

Del Staecker, ACFRE  
*Lancaster, Pa.*

Charles R. Stephens  
*Atlanta, Ga.*

Edith Tovar de Castro  
*Mexico, D.F., Mexico*

AFP BOARD CHAIRS AND FOUNDATION CHAIRS

AFP BOARD CHAIRS

Roberta A. Healey, MBA, NHA, ACFRE, 2009–2010  
 Timothy R. Burcham, CFRE, 2007–2008  
 Alphonse J. Brown Jr., ACFRE, 2005–2006  
 Colette M. Murray, J.D., CFRE, 2003–2004  
 Steve W. Batson, Ed.D., CFRE, 2001–2002  
 Barbara H. Mulville, CFRE, 1999–2000  
 Ron L. Carroll, CFRE (deceased), 1997–1998  
 Sandra A. Adams, ACFRE, 1995–1996  
 John S. Lore, Ph.D., CFRE, 1994  
 Charles R. Stephens, 1992–1993  
 Del Staecker, ACFRE, 1990–1991  
 Marshall Monroe, CFRE, 1988–1989  
 John Miltner, Ph.D., CFRE (deceased), 1986–1987  
 Barbara H. Marion, CFRE (deceased), 1984–1985  
 Thomas G. Sanberg, CFRE, 1982–1983  
 Robert C. Blum, CFRE (deceased), 1980–1981  
 Donald A. Campbell Jr., CFRE, 1978–1980  
 Byron Welch, 1975–1978  
 Henry Goldstein, CFRE, 1973–1975  
 Norman C. Smith, 1971–1973  
 Robert V. Donahoe (deceased), 1969–1971  
 Ralph E. Chamberlain, CFRE (deceased), 1967–1969  
 K. Brent Woodruff, 1966–1967  
 Jess W. Speidel II (deceased), 1964–1965  
 Dr. Abel Hanson (deceased), 1961–1963

FOUNDATION CHAIRS/  
 PRESIDENTS  
 (UNITED STATES)

William M. Moran, FAHP, ACFRE, chair 2010–  
 Donald G. Rizzo, CFRE, chair 2009  
 Paul J. Strawhecker, MPA, ACFRE, chair  
 2007–2008  
 Donald W. Taylor, CFRE, chair 2005–2006  
 Ronda J. Johnson, CFRE, chair 2004  
 William B. Hanrahan, CFRE, chair 2003  
 E. Ramone Segree, CFRE, chair 2002  
 William A. Durkin Jr., CFRE, chair 2001  
 Doris H. Heiser, CFRE, chair 2000

Stephen M. Levy, CFRE, chair 1999  
 Carleen K. Rhodes, CFRE, chair 1998  
 Robert E. Corder, CFRE, chair 1996–1997  
 Claudia A. Looney, FAHP, chair 1994–1995  
 Eugene R. Tempel, Ed.D., CFRE, chair  
 1992–1993  
 Barbara H. Marion, CFRE (deceased),  
 chair 1990–1991  
 Ernest W. Wood, Ed.D., CFRE (deceased),  
 president/chair 1988–1989  
 J. Patrick Ryan, chair 1988  
 J. Patrick Ryan, president 1987  
 Charles E. Lawson, CFRE, chair 1987  
 J. Patrick Ryan, CFRE, president 1986  
 Charles E. Lawson, CFRE, chair 1986  
 Charles E. Lawson, CFRE, president 1985  
 Donald A. Campbell Jr., CFRE, chair 1985  
 Charles E. Lawson, CFRE, president 1983–1984  
 Ralph E. Chamberlain, CFRE (deceased),  
 chair 1983–1984  
 Byron Welch, president 1982  
 Ralph E. Chamberlain, CFRE (deceased),  
 chair 1982  
 Byron Welch, president 1980–1981  
 Robert Pierpont, chair 1980–1981  
 Robert C. Blum, CFRE (deceased),  
 president 1979  
 Robert Pierpont, chair 1979  
 Robert Pierpont, president 1978  
 Norman C. Smith, chair 1978  
 Robert Pierpont, president 1976–1978  
 Henry Goldstein, CFRE, president 1974–1975  
 W. Homer Turner, Ph.D., president 1973

FOUNDATION CHAIRS  
 (CANADA)

Shauna Klein, M.A., chair 2009–2010  
 Marnie Hill, CFRE, chair 2007–2008  
 Sen. Terry M. Mercer, CFRE, chair 2005–2006  
 Maretta Emery, BA, CA, CFRE, chair 2003–2004  
 Andrea McManus, CFRE, chair 2000–2002

## LIST OF CHAPTERS AND WHEN THEY WERE FORMED

<i>Chapter Name</i>	<i>Year</i>	<i>Chapter Name</i>	<i>Year</i>
AFP NY, Greater New York Chapter.....	1964	AFP NY, Hudson-Mohawk Chapter .....	1981
AFP DC, Washington DC Metro Area Chapter .....	1965	AFP TN, Nashville Chapter .....	1981
AFP MA, Massachusetts Chapter .....	1967	AFP RI, Rhode Island Chapter .....	1981
AFP GA, Greater Atlanta Chapter.....	1968	AFP NM, New Mexico Chapter.....	1982
AFP OH, Greater Cleveland Chapter.....	1968	AFP IA, Central Chapter .....	1982
AFP CA, Greater Los Angeles Chapter .....	1968	AFP IN, Indiana Chapter.....	1982
AFP TX, Greater Houston Chapter.....	1969	AFP WI, Upper Mississippi Valley Chapter...	1982
AFP PA, Greater Philadelphia Chapter .....	1969	AFP NE, Nebraska Chapter .....	1982
AFP MN, Minnesota Chapter .....	1970	AFP FL, Central Chapter .....	1982
AFP ON, Greater Toronto Chapter .....	1970	AFP IL, Central Chapter .....	1982
AFP CA, Golden Gate Chapter .....	1971	AFP VA, First Chapter .....	1982
AFP MD, Maryland Chapter .....	1972	AFP OK, Eastern Oklahoma Chapter.....	1982
AFP MO, Mid-America Chapter .....	1973	AFP KS, Greater Wichita Chapter .....	1982
AFP WI, Greater Milwaukee Chapter.....	1973	AFP ND, Northern Plains Chapter .....	1983
AFP NJ, New Jersey Chapter .....	1974	AFP HI, Aloha Chapter .....	1983
AFP CA, San Diego Chapter.....	1974	AFP CA, Orange County Chapter .....	1983
AFP MO, St. Louis Regional Chapter .....	1974	AFP TX, Greater Austin Chapter .....	1984
AFP FL, Miami-Dade County Chapter .....	1975	AFP MO, Central Chapter.....	1984
AFP IL, Chicago Chapter .....	1976	AFP CO, Colorado Chapter .....	1984
AFP OH, Mahoning-Shenango Chapter .....	1976	AFP NH, Northern New England Chapter..	1984
AFP CA, Valley Chapter .....	1978	AFP FL, Palm Beach County Chapter.....	1984
AFP AZ, Greater Arizona Chapter .....	1978	AFP OR, Oregon & SW Washington Chapter .....	1984
AFP NY, Western Chapter .....	1979	AFP IL, Rockford Area Chapter.....	1984
AFP OH, Greater Cincinnati Chapter .....	1979	AFP TX, San Antonio Chapter.....	1984
AFP OH, Central Chapter .....	1979	AFP WA, Washington Chapter.....	1984
AFP TX, Greater Dallas Chapter .....	1979	AFP MO, Ozark Region Chapter.....	1984
AFP MI, Greater Detroit Chapter .....	1979	AFP NY, Central Chapter .....	1984
AFP AL, Alabama Chapter.....	1980	AFP AZ, Southern Chapter .....	1984
AFP TX, Fort Worth Metro Chapter.....	1980	AFP TX, Central Chapter .....	1984
AFP PA, Central Chapter.....	1980	AFP DE, Brandywine Chapter .....	1984
AFP AR, Arkansas Chapter .....	1980	AFP NC, Charlotte Chapter .....	1985
AFP CT, Connecticut Chapter.....	1980	AFP MI, West Michigan Chapter.....	1985
AFP LA, Greater New Orleans Chapter .....	1980	AFP KY, Bluegrass Chapter.....	1985
AFP OK, Oklahoma Chapter .....	1980	AFP TN, Memphis Chapter.....	1985
AFP PA, Western Chapter.....	1980	AFP CA, Capital Chapter.....	1985
AFP NY, Genesee Valley Chapter.....	1980	AFP CA, Silicon Valley Chapter .....	1985
AFP FL, Suncoast Chapter.....	1980	AFP SD, South Dakota Chapter.....	1985

# AFP: THE FIRST 50 YEARS

<i>Chapter Name</i>	<i>Year</i>	<i>Chapter Name</i>	<i>Year</i>
AFP PA, Eastern Chapter.....	1986	AFP AL, Gulf Coast Chapter .....	1991
AFP MT, Montana Chapter .....	1986	AFP NC, Triad Chapter .....	1991
AFP OH, North Central Chapter .....	1986	AFP TN, Mountain Empire Chapter.....	1992
AFP IA, Eastern Chapter .....	1986	AFP AZ, Northern Chapter .....	1992
AFP CA, Inland Empire Chapter .....	1986	AFP WI, Northeast Chapter .....	1992
AFP MS, Mississippi Chapter .....	1986	AFP GA, Middle Chapter .....	1992
AFP FL, First Coast Chapter.....	1986	AFP GA, Coastal Chapter .....	1992
AFP NY, Long Island Chapter .....	1986	AFP PA, Northeastern Pennsylvania Chapter .....	1992
AFP CA, Santa Barbara/ Ventura Counties Chapter .....	1986	AFP IA, Siouxland Chapter.....	1992
AFP IL, Capital Area Chapter .....	1986	AFP CT, Fairfield County Chapter.....	1993
AFP AK, Alaska Chapter .....	1987	AFP TX, Lubbock Area Chapter .....	1993
AFP TN, Southeastern Chapter .....	1987	AFP MX, Mexico City Chapter.....	1993
AFP KY, Greater Louisville Chapter.....	1987	AFP TX, Permian Basin Chapter.....	1993
AFP WI, Greater Madison Chapter .....	1987	AFP CA, Greater San Fernando Valley Chapter .....	1993
AFP NC, Triangle Chapter .....	1987	AFP BC, Vancouver Island Chapter .....	1993
AFP IL, Quad Cities Chapter.....	1987	AFP NC, Northwest Chapter.....	1994
AFP FL, Southwest Chapter .....	1987	AFP PA, Northwestern Chapter.....	1994
AFP SC, Piedmont Chapter .....	1987	AFP CA, Monterey Bay Chapter.....	1994
AFP FL, Big Bend Chapter .....	1987	AFP FL, Everglades Chapter .....	1994
AFP OH, Northwest Chapter .....	1987	AFP MA, Western Chapter .....	1994
AFP OH, Greater Dayton Region Chapter ..	1988	AFP FL, Treasure Coast Chapter .....	1995
AFP MI, Mid-Michigan Chapter.....	1988	AFP ID, Idaho Chapter .....	1996
AFP FL, Fort Lauderdale/Broward Chapter .....	1988	AFP AB, Calgary & Area Chapter .....	1996
AFP TN, Great Smoky Mountain Chapter ...	1988	AFP SC, Lowcountry Chapter .....	1996
AFP FL, West Chapter.....	1988	AFP CO, Southern Chapter.....	1996
AFP NV, Sierra Chapter.....	1988	AFP AB, Edmonton & Area Chapter .....	1996
AFP LA, Baton Rouge Chapter.....	1989	AFP VA, Piedmont Chapter .....	1996
AFP IL, East Central Chapter .....	1989	AFP ON, Ottawa Chapter .....	1996
AFP SC, Central Carolina Chapter.....	1989	AFP VA, Central Chapter.....	1996
AFP LA, North Chapter .....	1989	AFP BC, Vancouver Chapter.....	1996
AFP KS, Topeka Chapter on Philanthropy ...	1989	AFP VA, Tri-State Chapter .....	1996
AFP TX, Texas Plains Chapter .....	1990	AFP MB, Manitoba Chapter .....	1996
AFP GA, Greater Augusta Chapter .....	1990	AFP TX, West Texas–Southern New Mexico Chapter .....	1998
AFP AL, Central Chapter .....	1990	AFP QC, Quebec Chapter .....	1998
AFP NC, Western Chapter.....	1991	AFP SK, Saskatoon Chapter.....	1998
AFP VA, Shenandoah Chapter .....	1991	AFP IN, Michiana Chapter .....	1998
AFP MI, Capital Area Chapter.....	1991	AFP CA, Yosemite Chapter.....	1998
AFP NV, Las Vegas Chapter.....	1991		

# AFP: THE FIRST 50 YEARS

<i>Chapter Name</i>	<i>Year</i>
AFP PR, Puerto Rico Chapter .....	1999
AFP MD, Western Maryland Chapter .....	2000
AFP AR, Northwest Chapter .....	2001
AFP VA, Hampton Roads Chapter.....	2001
AFP MX, Monterrey Chapter .....	2001
AFP SK, Regina Chapter.....	2001
AFP MX, Baja California Chapter .....	2001
AFP ON, Canada South Chapter .....	2001
AFP MA, Central Massachusetts Chapter.....	2001
AFP PA, Allegheny Mountains Chapter .....	2002
AFP TX, Coastal Bend Chapter .....	2002
AFP IA, Greater Tri-State Chapter.....	2002
AFP IN, Northeast Chapter.....	2002
AFP NY, Finger Lakes Chapter .....	2002
AFP NF, Newfoundland and Labrador Chapter .....	2002
AFP NS, Nova Scotia Chapter .....	2003
AFP CH, Hong Kong Chapter .....	2003
AFP ON, South Eastern Ontario .....	2003
AFP MN, Southern Minnesota Chapter.....	2003
AFP CA, Wine Country Chapter .....	2003
AFP IN, Indiana Purdue at Fort Wayne Chapter .....	2005
AFP FL, Arredondo Chapter .....	2005
AFP Indonesia, Jakarta Chapter .....	2005
AFP AZ, Arizona State Collegiate Chapter...	2005
AFP Singapore Chapter .....	2005
AFP PA, Berks Regional Chapter .....	2005
AFP Mount Royal College Collegiate Chapter.....	2006
AFP CA, Desert Communities Chapter.....	2006
AFP PA, Mercyhurst College Chapter.....	2006
AFP OR, University of Oregon Collegiate Chapter.....	2006
AFP ON, Golden Horseshoe Chapter.....	2006
AFP IN, IUPUI Collegiate Chapter.....	2006
AFP KY, Thoroughbred Chapter at the University of Kentucky .....	2006

<i>Chapter Name</i>	<i>Year</i>
AFP University of Central Florida Collegiate Chapter.....	2006
AFP NY, Mid-Hudson Valley Chapter .....	2006
AFP TX, Prairie View A&M University Collegiate Chapter.....	2006
AFP WA, South Sound Chapter .....	2006
AFP FL, Indian River Chapter .....	2006
AFP NC, Cape Fear Region.....	2007
AFP Mexico, Chihuahua Chapter .....	2007
AFP MX, Occidente de Mexico .....	2007
AFP MI, Collegiate Chapter at Lawrence Tech University.....	2007
AFP FL, Space Coast Chapter.....	2007
AFP PA, Pocono Mountains Chapter.....	2007
AFP SC, Coastal Chapter.....	2007
AFP LA, Greater Northshore Chapter .....	2007
AFP FL, First Coast Collegiate Chapter at UNF .....	2007
AFP NJ, Southern Chapter .....	2008
AFP MX, Capitulo Sinaloa Chapter.....	2008
AFP TX, East Texas Chapter.....	2008
AFP OK, Sooner Collegiate Chapter.....	2008
AFP IN, Indiana State University Collegiate Chapter.....	2009
AFP IN, Northwest Chapter.....	2009
AFP FL, Nature Coast Chapter.....	2009
AFP MN, Central and Southwestern Chapter .....	2009
AFP TX, University of Houston Collegiate Chapter .....	2009
AFP TN, Vandy Collegiate Chapter .....	2009
AFP FL, Polk County Chapter.....	2009
AFP Egypt & MENA Chapter .....	2010
AFP FL, Charlotte Harbor Chapter .....	2010
AFP IA, Northeast Chapter .....	2010
AFP LA, Southwest Chapter .....	2010
AFP NY, Westchester Chapter.....	2010