Member Involvement Manual
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- BE the CAUSE
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Melissa Simon, President
msimon@msw@gmail.com
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dawn@clarity-houston.com
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swise@swisestrategies.com
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rbyrd@jdrl.org
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rlamb@dinisphericis.com

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tom.moore@kinkaid.org

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Jillian Day, Past Chair
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Natalia Alvarez, Chair
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Eniye Elegon, Co-chair
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Chris Kasavich, Chair
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Lisa Garces
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Emily Schreiber, Co-chair
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**Strategic Planning**
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jday@houstonzoo.org
Ronnie Hagerty
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COMMUNITY CALENDAR

Here you can find out about our upcoming events and view photo galleries of past events. Some events may allow for online registration and purchase. Click the event name to view more details.

Mark your calendar for our future Educational Sessions and Luncheons:

UPCOMING EVENTS

Sunday, April 15, 2018

International Fundraising Conference
4/15/2018 → 4/17/2018
Export to Your Calendar

Friday, April 20, 2018

2018 April Educational Luncheon
4/20/2018
Location: Houston, Texas  Time: 11:00 AM
Export to Your Calendar  Register

Friday, April 27, 2018

Advanced Professionals Luncheon
4/27/2018
Location: Houston, Texas  Time: 11:30 am - 1:00 pm
Export to Your Calendar  Register

Friday, May 18, 2018

May Educational Luncheon
5/18/2018
Friday, June 15, 2018
Ask The Experts Conference
6/15/2018
Location: Houston, Texas  Time: 8:00 AM - 5:00 PM
Export to Your Calendar

Friday, July 20, 2018
July Educational Luncheon
7/20/2018
Time: 11:00 AM
Export to Your Calendar

Friday, August 17, 2018
August Educational Luncheon
8/17/2018
Time: 11:00 AM
Export to Your Calendar

Tuesday, September 18, 2018
National Philanthropy Day
9/18/2018
Location: Houston, Texas  Time: 11:00 AM
Export to Your Calendar

Thursday, October 11, 2018
Leadership Academy - Toronto, Canada
10/11/2018 » 10/13/2018
Export to Your Calendar

Friday, October 19, 2018
October Educational Luncheon
10/19/2018
Time: 11:00 AM
Export to Your Calendar

Thursday, November 15, 2018
National Philanthropy Day Luncheon
11/15/2018
Export to Your Calendar
2018 AFP Membership Scholarship Application

Amount Awarded: $250
Application Deadline: Before the 1st of each month.

Requirements Before Applying:
☐ None! We encourage all interested members to apply.

Requirements If Awarded:
☐ Write a brief statement about your appreciation for the scholarship.
☐ Join a committee.
☐ Help to recruit new members.

Name ______________________________ Title ____________________________

Organization ________________________________________________________

Address _____________________________________________________________

City __________________ State _______ Zip ______________

E-mail __________________________ Birthday _______/_______/_________

Business Phone ______________________

Time employed as a fund raising professional _______ years

Member of AFP (yes/no) _______________ Membership #: ___________________

How long have you been responsible for fund raising with your present employer? _________

Which committee would you be interested in serving on? AFP-GHC Committee Choice (e.g., Ask the Experts, National Philanthropy Day, Marketing, Membership, Diversity, Youth in Philanthropy)? ___________________________________________________________

Why do you want to receive one of the scholarships? (<150 words; attach additional sheet)
__________________________________________________________

Name of professional reference:
________________________________________________________

Professional reference’s phone number or email: __________________________

Applicant’s Signature _____________________________________________ Date: __________________
Application checklist:

- Completed application, additional essay, and professional reference
- Email above items to: AFP Greater Houston Chapter, admin@afphouston.org

AFP-GHC use:

Date Received   Date Reviewed   Date Approved/Denied

$ Total Awarded   Date Check Sent   Check #

Notes:

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________________________________________________________________________
2018 AFP Chamberlain Scholarship

Amount Awarded: up to $2000
Application Deadline: October 31, 2018

Requirements Before Applying:
- Must be a member of AFP for at least 2 years
- Applicant should have not received a prior scholarship to ICON through AFP
- You must have an AFP Board Member Recommendation

Requirements If Awarded:
- Write a brief statement about your appreciation for the scholarship.
- Highly encouraged to be more active in an AFP GHC Committee

Name __________________________________________ Title __________________________

Organization ________________________________________________________________

Address ____________________________________________________________________

City __________________________ State ____________ Zip ______________

E-mail __________________________ Birthday ______ / ______/ ______

Business Phone ______________________

Time employed as a fund raising professional _______ years

Member of AFP (yes/no) ______________ Membership #: __________________________

How long have you been responsible for fund raising with your present employer? ________

Have you ever received a scholarship to ICON through AFP? __________________________

Which AFP GHC committee would you be interested in serving on? (e.g., Ask the Experts, National Philanthropy Day, Marketing, Membership, Diversity, Youth in Philanthropy)? __________________________

Why do you want to receive one of the scholarships? (<150 words; attach additional sheet)

____________________________________________________________________________

Name of professional reference: ________________________________________________

Professional reference’s phone number or email: _________________________________
AFP Greater Houston Chapter
2018 Awards & Scholarships Program

Applicant’s Signature ____________________________ Date: ____________________

Application checklist:

__ Completed application, additional essay, and professional reference
__ AFP Board Member Recommendation
__ Résumé
__ Email above items to: AFP Greater Houston Chapter, admin@afphouston.org

AFP-GHC use:

__________________ Date Received __________ Date Reviewed __________ Date Approved/Denied

$__________ Total Awarded __________ Date Check Sent __________ Check #

Notes: ____________________________

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2018 Professional Development Fund

Amount Awarded: Up to $500
Application Deadline: Rolling

Requirements Before Applying:
☐ Must be a member of AFP for at least 1 year

Requirements If Awarded:
☐ Write a brief statement about your appreciation for the scholarship

Name __________________________ Title __________________________

Organization ________________________________________________

Address _____________________________________________________

City __________________________ State ___________ Zip ___________

E-mail __________________________ Birthday _____ / _____ / _______

Business Phone ______________________

Time employed as a fund raising professional _______ years

Member of AFP (yes/no) ______________ Membership #: ______________________

How long have you been responsible for fund raising with your present employer? ______

Which AFP GHC committee are you currently serving on? (e.g., Ask the Experts, National Philanthropy Day, Marketing, Membership, Diversity, Youth in Philanthropy)? __________________________

Why do you want to receive one of the scholarships? (<150 words; attach additional sheet)

________________________________________________________________________

Please provide information on the course or certification you hope to complete:

________________________________________________________________________

Name of professional reference: __________________________

Professional reference’s phone number or email: __________________________

Applicant’s Signature __________________________ Date: __________________________
Application checklist:
__ Completed application, additional essay, and professional reference
__ Résumé
__ Email above items to: AFP Greater Houston Chapter, admin@afphouston.org

AFP-GHC use:

________________ Date Received  __________ Date Reviewed  __________ Date Approved/Denied

$___________ Total Awarded  __________ Date Check Sent  __________ Check #

Notes:

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2018 Rice CPNL Courses

Amount Awarded: $250
Application Deadline: 4 weeks prior to course

Requirements Before Applying:
☐ Must be a member of AFP for at least 1 year

Requirements If Awarded:
☐ Write a brief statement about your appreciation for the scholarship
☐ You must commit to mentoring a young professional

Name ____________________________ Title ____________________________
Organization __________________________________________________________________
Address ________________________________________________________________________
City ___________________ State _______ Zip ________
E-mail __________________________ Birthday _______/_____/________
Business Phone __________________________
Time employed as a fund raising professional ________ years

Member of AFP (yes/no) __________________ Membership #:________________________

How long have you been responsible for fund raising with your present employer? ______

Which AFP GHC committee are you currently serving on? (e.g., Ask the Experts, National Philanthropy Day, Marketing, Membership, Diversity, Youth in Philanthropy)? __________________________

Why do you want to receive one of the scholarships? (<150 words; attach additional sheet) __________________________

Name of professional reference: __________________________

Professional reference’s phone number or email: __________________________

Applicant’s Signature __________________________ Date: __________________________
Application checklist:

- Completed application, additional essay, and professional reference
- AFP Board Member Recommendation
- Résumé
- Email above items to: AFP Greater Houston Chapter, admin@afphouston.org

AFP-GHC use:

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$ Total Awarded

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Notes:

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2018 CFRE Certification/Course/Test

Amount Awarded: $250
Application Deadline: 4 weeks prior to course

Requirements Before Applying:
☐ Must be a member of AFP for at least 2 years
☐ You must have an AFP Board Member Recommendation
☐ You must be currently serving on an AFP Committee

Requirements If Awarded:
☐ Write a brief statement about your appreciation for the scholarship
☐ You must commit to mentoring a young professional

Name __________________________ Title __________________________

Organization __________________________

Address __________________________

City __________________________ State __________ Zip __________

E-mail __________________________ Birthday ______ / ______ / ______

Business Phone __________________________

Time employed as a fund raising professional ______ years

Member of AFP (yes/no) ___________ Membership #: __________________________

How long have you been responsible for fund raising with your present employer? ________

Which AFP GHC committee are you currently serving on? (e.g., Ask the Experts, National Philanthropy Day, Marketing, Membership, Diversity, Youth in Philanthropy)?

__________________________________________

Why do you want to receive one of the scholarships? (<150 words; attach additional sheet)

__________________________________________

Name of professional reference: __________________________

Professional reference’s phone number or email: __________________________

Applicant’s Signature __________________________ Date: ____________
Application checklist:
___ Completed application, additional essay, and professional reference
___ AFP Board Member Recommendation
___ Résumé
___ Email above items to: AFP Greater Houston Chapter, admin@afphouston.org

AFP-GHC use:

________ Date Received __________ Date Reviewed __________ Date Approved/Denied

$________ Total Awarded __________ Date Check Sent __________ Check #

Notes: ________________________________________________________________

____________________________________________________________________

____________________________________________________________________
Volunteer Opportunities within the Chapter

Community Outreach and Diversity (Vida Avery)
- Outreach and service to diverse individuals and organizations
- Youth in Philanthropy
- Collegiate Chapters (Kate Yadan and Adam Supgul)

Membership (Natalia Alvarez)
- Recruitment and Retention
- Leading New Member Orientation
- Planning chapter mixers

Professional Advancement (Nick Stinson)
- Monthly Programs

Ask the Experts Conference (Beth Wilson and Rebecca Lamb)

Mentoring (Chris Kasavich)

Finance (Rick Byrd)

National Philanthropy Day (Marilu Garza)
- National Philanthropy Day Awards
- Sponsorship
- Volunteers
- Marketing
- Logistics / Hospitality

Communications (Rachel Moody and Melissa Neeley)
- Social Media
- Marketing
- Blog Posts

Government Relations (Marcus Brewer)

Resource Development / AFP Sponsorship and Partnerships (Amy Lampi)

Scholarships/Awards (Lauren Futch)

Strategic Planning (Jillian Day)

For questions or more information, contact:
Mary Altemus, AFP Management, at admin@afphouston.org or visit us online: www.afphouston.org/volunteer
AFP-GHC Mentorship Program

Are you new to fundraising and looking for a friend and mentor in the profession? Perhaps you're looking to move in a new direction within the field of fundraising or expand your current fundraising skills. Or, are you an experienced fundraiser and want to help a newcomer to the field? The AFP Houston Mentoring Program is a terrific way to give back to those who are new to fundraising, and to increase your skills and confidence as a newcomer to the field.

Mentors should...

1. Have a minimum of five years in the profession.
2. Be available for an initial face-to-face meeting with your assigned mentee.
3. Be available for follow-up by email and phone.
4. Provide guidance and direction about strategies and where to go for help.

Mentees should...

1. Be a member of AFP-GHC
2. Be responsible for initial contact with assigned mentor.
3. Help establish goals and objectives for mentoring relationship.

If you would like to be assigned a mentor or become a mentor, please email Chris Kasavich at CJKasavich@mdanderson.org and note AFP Mentoring in the subject line of your email.

Please include the following information in your email:
1. Resume
2. Brief statement about where you are in your career and where you are hoping to move in your career.
3. If you are looking for a mentor, brief statement that explains what you are looking for in a mentor.
# A Donor Bill of Rights

**PHILANTHROPY** is based on voluntary action for the common good. It is a tradition of giving and sharing that is primary to the quality of life. To ensure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the non-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

<table>
<thead>
<tr>
<th>I.</th>
<th>VI.</th>
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<tbody>
<tr>
<td>To be informed of the organization’s mission, of the way the organization intends to use donated resources, and of its capacity to use donations effectively for their intended purposes.</td>
<td>To be assured that information about their donations is handled with respect and with confidentiality to the extent provided by law.</td>
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<tr>
<th>II.</th>
<th>VII.</th>
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<tr>
<td>To be informed of the identity of those serving on the organization’s governing board, and to expect the board to exercise prudent judgment in its stewardship responsibilities.</td>
<td></td>
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<tr>
<td>To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.</td>
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<tr>
<th>III.</th>
<th>VIII.</th>
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<tr>
<td>To have access to the organization’s most recent financial statements.</td>
<td></td>
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<tr>
<td>To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.</td>
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<th>IV.</th>
<th>IX.</th>
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<tr>
<td>To be assured their gifts will be used for the purposes for which they were given.</td>
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<td>To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.</td>
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<th>V.</th>
<th>X.</th>
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<tr>
<td>To receive appropriate acknowledgement and recognition.</td>
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<td>To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.</td>
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**DEVELOPED BY:**
- Association of Fundraising Professionals (AFP)
- Association for Healthcare Philanthropy (AHP)
- Council for Advancement and Support of Education (CASE)
- Giving Institute: Leading Consultants to Non-Profits

**ORIGINALLY ENDORSED BY:**
- Independent Sector
- National Catholic Development Conference (NCDC)
- National Committee on Planned Giving (NCPG)
- Council for Resource Development (CRD)
- United Way of America

*Adopted in 1993*

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<table>
<thead>
<tr>
<th>Membership Types</th>
<th>AFP Business Membership</th>
<th>AFP's Nonprofit Organizational Membership - Large</th>
<th>AFP's Nonprofit Organizational Membership - Small</th>
<th>Executive Circle: $5,000, Endorse: $1,500</th>
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<tbody>
<tr>
<td>AFP Student</td>
<td>$120 plus chapter dues</td>
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<tr>
<td>AFP's Nonprofit Organizational Membership - Small</td>
<td>$325 plus chapter dues</td>
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<td>AFP's Nonprofit Organizational Membership - Large</td>
<td>$220 plus chapter dues</td>
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<td>AFP's Nonprofit Organizational Membership - Small</td>
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<tr>
<td>AFP's Nonprofit Organizational Membership - Large</td>
<td>$65 plus chapter dues</td>
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<tr>
<td>AFP's Nonprofit Organizational Membership - Small</td>
<td>$250 plus chapter dues</td>
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Please note: To qualify as an AFP College Member, the individual must attend a school that has an AFP College Chapter.
BE the CAUSE

About:

AFP Foundation for Philanthropy has an individual giving program – the BE the CAUSE Campaign (formerly the Every Member Campaign). Your support helps to advance the fundraising profession globally and locally, through the Greater Houston Chapter. A portion of every donation made to the AFP Foundation directly benefits our chapter. Please visit afpnet.org for more details about the campaign. For those of you who have supported the campaign in the past or plan to support it this year – thank you! You are the best of the best; fundraisers who are also philanthropists!!

Why Give:

Your gift helps to support:

- Professional tools and resources like the AFP Online Knowledge Center and the AFP Ethics Assessment Inventory
- Research to increase knowledge of philanthropy for effective fundraising practices
- Scholarships for education and training programs, and leadership development
- Most importantly, a portion of every donation YOU make to BE the CAUSE comes back to our chapter helping to support: monthly educational programs and luncheons, networking opportunities with membership mixers, webinars, etc.

Donate:

Visit afpnet.org to make a gift. If you have any questions, please contact the AFP-GHC office at admin@afphouston.org.

Be committed to the cause and pay it forward!