



# Welcome!!

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[www.AFPNEO.org](http://www.AFPNEO.org)

Thank you for your interest in joining the Association of Fundraising Professionals Northeast Ohio Chapter (AFPNEO). Your AFP membership will provide you with a variety of opportunities for professional development as well as a vast array of networking and educational prospects, and our goal is to enable you to reap the most benefits from your membership and from the many resources available within the AFPNEO community.

To join AFP, please visit our national website at [www.afpnet.org](http://www.afpnet.org) and click on the blue [Join AFP] button.

Please feel free to contact the AFP office at 330-329-2472 if you have any questions.

Sincerely,

A handwritten signature in blue ink that reads 'Carol Hawk'.

Carol Hawk  
Chair, Membership





## Association of Fundraising Professionals Northeast Ohio Chapter

PO Box 1286, Bath OH 44210

330-329-2472 | Fax 330-315-0399 | [info@AFPNEO.org](mailto:info@AFPNEO.org) | [www.AFPNEO.org](http://www.AFPNEO.org)

# TOP TEN REASONS FOR YOU TO JOIN THE ASSOCIATION OF FUNDRAISING PROFESSIONALS

- 1. Proclaim your professionalism.**  
Adding your name to the ranks of over 30,000 fundraising professionals declares your pride in the profession you have chosen.
  - 2. Advertise your integrity.**  
AFP has a reputation for upholding high standards. Since every AFP member signs his/her adherence to the Code of Ethical Principles and the Standards of Professional Practice every year, you align yourself with like-minded practitioners of ethical fundraising.
  - 3. Advance your career.**  
AFP members enjoy educational opportunities designed to increase knowledge and keep up with the newest trends in fundraising, both on the international and local levels. Our chapter offers six professional development breakfast programs with various speakers.
  - 4. Further your cause.**  
The more that you learn about the latest methods in fundraising, the better equipped you are to further the cause of the organization you represent.
  - 5. Network with others who do what you do.**  
Making connections is an important part of fundraising for the cause you represent. Meet others who can help you make those connections at events such as the International Conference on Fundraising and locally at the Career Success Institute, Member Orientation program, and Professional Development breakfast programs.
  - 6. Advocate for your profession.**  
Serious-minded professionals know that serving the profession means responding to calls for action from those who represent the profession. AFP has an active program that monitors trends in education, regulation, and practice standards and periodically advises members on required action.
  - 7. Serve your profession.**  
Opportunities abound for individuals to serve on local committees such as National Philanthropy Day, Professional Development Committee, Diversity and others listed on our website. Local and International committees work on a variety of issues - from building the core body of fundraising knowledge to building the public trust in the philanthropic process.
  - 8. Don't reinvent the wheel...use available resources.**  
AFP's Resource Center can provide you with the resources you need to do your job well. AFP staff can assist you in many areas ranging from how-to materials to samples of materials developed by other fundraising professionals that will fit your needs.
  - 9. Play a part in elevating the status of the fundraising profession.**  
Your membership in AFP and your dedication to the ethical principles that guide the fundraising process elevates the entire profession. You can also become a mentor with our local chapter.
  - 10. Do it for YOURSELF!**  
It's all about YOU, the fundraising professional. AFP's educational, networking, and career planning programs will take you where you want to go!
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# THE CASE FOR YOUR ORGANIZATION TO SUPPORT AFP MEMBERSHIP

### **Advertise your organization's reputation for integrity**

Your organization and your employees' affiliation with AFP signals to volunteers, staff, donors and the general public that your organization adheres to the highest professional standards and builds trust in the work you do as an organization. AFP members annually reaffirm their commitment and adherence to both the AFP Code of Ethical Principles and Standards of Professional Practice and A Donor Bill of Rights, which every member promotes as part of their membership commitment. In addition, AFP members have a professional team of experts on ethics at their command at all times.

### **Advance your organization's mission**

Education and training bring you and your staff the latest in fundraising innovations, keep you apprised of trends in the philanthropic sector, and will help you to adjust your operations to use resources in the most efficient and productive manner possible. Membership in AFP will help your development team to effectively integrate the fundraising process throughout your organization and engage both staff and board members in the process of raising funds to advance your mission. Connections made at both the local and international level help raise the visibility of your organization by communicating your mission to the nonprofit community.

### **Succeed in an increasingly competitive environment**

Put the collective knowledge and experience of the world's largest association of fundraising professionals to work for you and your organization. Whether you are looking for statistics on giving, revising your gift acceptance policy, or wish to revise job descriptions for development staff, the AFP Resource Center is available to members at no charge.

### **Invest in your professional staff with cutting-edge training and education**

Retaining valuable staff members by investing in their professional development will pay big dividends! Staff members build confidence in their skills and make valuable contacts with other professionals...in turn; your support for their professional efforts will build loyalty to the organization and enhance performance.

### **Recruit from an international database of development professionals**

When recruiting for new development staff, use the Online Job Service hosted on AFP's website to gain instant access to fundraising professionals around the world and in your local community. By hiring an AFP member, you are assured that they are adhering to the AFP Code of Ethical Principles and Standards of Professional Practice and promoting A Donor Bill of Rights.

### **Partner with other nonprofit executives to advocate for the nonprofit sector**

AFP represents the profession in matters relating to fundraising, tax incentives for giving, privacy issues and other charitable initiatives. AFP not only keeps you advised about pending regulations and legislation but acts on the profession's behalf when advising and lobbying legislators on behalf of fundraisers in all areas of the profession--from healthcare and education, to the arts and social benefit agencies.

### **Advance philanthropy through public outreach**

A priority of the AFP strategic plan is to strengthen the profession through public outreach to increase understanding of the positive economic impact of the sector and fundraising profession, as well as to increase public trust in fundraising. Events such as National Philanthropy Day®, a community-wide celebration of philanthropy, enable your organization to show appreciation to your donors and volunteers in a public forum. Add your organization's voice to this important initiative.

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## FREQUENTLY ASKED QUESTIONS ABOUT JOINING AFP

### **Does my membership belong to me or to the organization I work for?**

It depends on the type of membership that you join. If you are a Professional, Young Professional, Global eMember, Collegiate or Associate member, the membership is yours and goes with you if you leave an organization. The Nonprofit Organizational Membership for both large and small organizations belongs to the organization or company. If an employee leaves, the organization may replace the name of the designated member. New members still need to fill out a membership application and sign their adherence to the AFP Code of Ethical Principles and Standards.

### **Does my membership stay with me if I switch organizations?**

If you are in one of the individual membership categories, the membership goes with you when you switch organizations. If your membership is part of a small/large nonprofit organization membership, then it stays with the organization. In that case, the organization should contact the Chapter Administrator to update the membership contact information.

### **What if I am retiring?**

If you have been an AFP member for the past 5 years, check your membership renewal invoice and indicate the change to the Retired Member category. If you prefer, you can call AFP membership services at 800-666-3863.

### **Can I join just the local Chapter?**

AFPI does not permit this. When a member joins AFP, he or she joins both the international organization and a local chapter. Thus, a member pays both the annual and local dues to the International Headquarters, which then reimburses your local dues to the local chapter.

### **How much are annual dues?**

Your membership dues depend on the type of membership applicable to you. Members must self-assess to determine the type of membership for which they are eligible. Prospective members should self-determine the category of membership, and renewing members should review and reassess membership categories. Click [here](#) for descriptions of the categories available to you. From the dues you send to AFPI, the AFP Northeast Ohio Chapter will receive \$25-\$55, depending on the membership level you choose.

### **What if I want to be a member of two different chapters?**

That's very easy to do. Simply call AFP International at 800-666-3863 and tell them which chapters you want to join. You will need to pay for one AFP membership plus the chapter dues for both chapters (the AFPNEO chapter dues are \$35).

### **How long does my membership last?**

Your membership lasts 12 months, starting in the month you officially become a member.

*Do you have further questions? Email them to [info@afpneo.org](mailto:info@afpneo.org).*

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# Membership Levels

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<http://www.afpnet.org> – JOIN AFP – Membership Types  
Northeast Ohio Chapter dues are \$35

## INDIVIDUAL MEMBERSHIPS

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### Professional

Full membership in the Association shall be open to individuals (a) who, among other responsibilities, hold some degree of accountability for income-generation within the fundraising process; (b) who must hold some degree of responsibility directly for fundraising; (c) who are compensated for their services; and (d) who subscribe to the AFP Code of Ethical Principles and Standards and promote the Donor Bill of Rights. Active members in good standing may vote, serve on chapter or Association committees and task forces and hold Association or chapter office. \$250 plus \$35 chapter dues.

### Young Professional

Young Professional: Open to persons who hold some degree of responsibility directly for fundraising, work within the U.S. and Canada and are compensated for their services, and are 30 years old or younger, must subscribe to the AFP Code of Ethical Principles and Standards and its bylaws and promote the Donor Bill of Rights and be employed, or have been employed by an organization that provides benefits to society. \$95 (\$65.00 plus \$30.00 chapter dues).

### Retired

Retired membership in the Association shall be open to individuals who no longer practice as paid fundraising professionals but who, at the time they seek Retired Member status, have been Professional members of the Association for the immediate past five consecutive years and subscribe to the AFP Code of Ethical Principles and Standards and promote the Donor Bill of Rights. Retired members in good standing may vote, serve on chapter boards, committees and task forces, as well as Association committees and task forces, but may not hold any Association office. \$75.00 plus \$35 chapter dues.

### Associate

Associate membership in the Association shall be open to individuals or volunteers (a) who are engaged in fields related to fundraising and fundraising support, or (b) who have mutual interests with fundraising professionals, and (c) who subscribe to the AFP Code of Ethical Principles and Standards and promote the Donor Bill of Rights. Associate members in good standing may vote, serve on chapter or Association committees and task forces and hold Association or chapter office. \$250.00 plus \$35 chapter dues.

## ORGANIZATION MEMBERSHIPS

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AFP's Nonprofit Organizational Memberships champion effective and ethical fundraising, promote philanthropy and charitable giving and grow the fundraising profession. A Nonprofit Organizational Membership will provide long-term value to the profession through broader representation in our public policy initiatives. Nonprofit Organizational Membership also brings public recognition of an organization's commitment to foster ethical standards and professionalism in fundraising.

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### **AFP Nonprofit Organizational Membership - Small**

Open to nonprofit organizations who can answer yes to all the following criteria:

- An operating budget of less than \$1,000,000
- A fundraising department with less than two (2) Full time equivalent (FTE) staff
- Individually incorporated or otherwise organized as a separate entity in the laws of the specific country; and
- Not affiliated with a larger institution supporting their operations.

The organization will designate one fundraising professional to receive the benefits offered in this membership category. The membership may be transferred to another individual if the original member leaves the organization. Must subscribe to the AFP Code of Ethical Principles and Standards and promote the Donor Bill of Rights. Limit one membership per organization. Nonprofit Organizational members in good standing may vote, serve on chapter or Association committees and task forces and hold Association or chapter office. \$175.00 (\$120.00 plus \$55.00 chapter dues).

### **AFP Nonprofit Organizational Membership - Large**

AFP's Nonprofit Organizational Memberships champion effective and ethical fundraising, promote philanthropy and charitable giving and grow the fundraising profession. A Nonprofit Organizational Membership will provide long-term value to the profession through broader representation in our public policy initiatives. Nonprofit Organizational Membership also brings public recognition of an organization's commitment to foster ethical standards and professionalism in fundraising.

Shall be open to nonprofit organizations who wish to have multiple members in the association. The organization will designate a minimum of eight (8) to receive Professional member benefits. The memberships may be transferred to another individual if the original member leaves the organization. Must subscribe to the AFP Code of Ethical Principles and Standards and promote the Donor Bill of Rights. Nonprofit Organizational members in good standing may vote, serve on chapter or Association committees and task forces and hold Association or chapter office. Starting at \$2,200.00 for eight members.

### **AFP Business Membership**

AFP's Code of Ethical Principles and Standards had been amended and expanded to apply to for-profit businesses involved with or supporting Fundraising. The changes, which include the addition of seven new standards and the alteration of one standard, now allows for-profit businesses to join AFP as members and actively promote ethical and effective fundraising.

Business membership in the Association shall be open to for-profit organizations whose work complements the fundraising profession. The Executive Circle Business member shall be entitled to designate two employees to receive full benefits as Associate members of the Association. Endorser Business Members shall be entitled to designate one employee to receive full benefits as an Associate member of the Association. The designated individuals, as well as the organization which constitutes the Business member, must subscribe to the AFP Code of Ethical Principles and Standards and promote the Donor Bill of Rights.

Business members in good standing may, through their designated employees referenced above, vote, serve on chapter or Association committees and task forces and hold Association or chapter office. Executive Circle: \$5,000.00, Endorser: \$1,500.00.

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# Membership Benefits

Carol Hawk, Chair, Membership

<http://www.AFPNEO.org/membership.htm>

## Information and Research

Library services, publications, and research keep AFP members up to date on the latest information on fundraising practices.

- AFP's highly acclaimed bi-monthly magazine *Advancing Philanthropy* examines issues facing fundraisers and the philanthropic process. It includes enlightening interviews, how-to articles, current research, and information on public policy.
- The AFP Fundraising Resource Center staff is available to research and locate answers to your fundraising questions from over 3,200 reference works.
- AFP monitors legislative and regulatory issues that affect fundraising and philanthropy and keeps members informed through Legislative Updates and Action Alerts.
- *Directory of Consultants and Resource Partner Pages* is a comprehensive annual listing of consultants and resource partners ready to meet your organization's needs.
- AFP's Career Profile examines member demographics, career trends, salaries, and experience. Find out about the members of your profession.
- AFP members have access to the *AFP Membership Directory* online through the Member Gateway. This members-only benefit is an important networking and resource tool.

## Professional Development

Membership provides access to continuing education opportunities offered locally and through the International Headquarters. Members receive discounts on registration fees.

- AFP's local chapters offer you a chance to network and attend meetings, educational programs, and social events.
- AFP's [International Conference](#) is held each spring and brings nearly 4,000 fundraising professionals together to discuss, teach, and learn about new development issues. It offers over 200 educational sessions designed to serve the development needs of participants from entry level to highly experienced. The Conference exhibit hall features over 300 vendors.
- The AFP AudioConferences are a series of 90-minute programs on topics most requested from the AFP Fundraising Resource Center.
- AFP [First Course in Fundraising](#) teaches the basic skills that new professionals need. Materials include on-the-job references for such issues as ethics, case statements, annual giving, major gifts, and development office management.
- AFP [Survey Course in Fundraising](#), intended for professionals with five years of experience, presents the mechanics of a complete fundraising program, including planning, execution, and evaluation.
- Through collaboration with other professional organizations, AFP offers a discount to members who pursue the benchmark of professional development through the [Certified Fund Raising Executive \(CFRE\) Certification Program](#).
- The Executive Leadership Institute offers senior-level professionals an overview of the historical, philosophical, and theoretical bases for philanthropy. The Executive Management Institute offers discussion and analysis of important management issues for the fundraising professional. The [Advanced Certified Fund Raising Executive \(ACFRE\)](#) credential is designed for senior-level fundraising executives.

## Member Discounts

- Members receive discounts on books through the AFP [Bookstore](#), one of the largest offerings of specialized books on fundraising, volunteerism, and philanthropy.
- AFP offers a variety of [member discount and affinity programs](#), including overnight delivery discounts, rental car discounts, and more.

# AFP Code of Ethical Principles and Standards of Professional Practice

Adopted 1964, Amended October 2004

The Association of Fundraising Professionals (AFP) exists to foster the development and growth of fundraising professionals and the profession, to promote high ethical standards in the fundraising profession and to preserve and enhance philanthropy and volunteerism. Members of AFP are motivated by an inner drive to improve the quality of life through the causes they serve. They serve the ideal of philanthropy; are committed to the preservation and enhancement of volunteerism; and hold stewardship of these concepts as the overriding principle of their professional life. They recognize their responsibility to ensure that needed resources are vigorously and ethically sought and that the intent of the donor is honestly fulfilled. To these ends, AFP members embrace certain values that they strive to uphold in performing their responsibilities for generating philanthropic support.

## **AFP members aspire to:**

- ★ practice their profession with integrity, honesty, truthfulness and adherence to the absolute obligation to safeguard the public trust;
- ★ act according to the highest standards and visions of their organization, profession and conscience;
- ★ put philanthropic mission above personal gain;
- ★ inspire others through their own sense of dedication and high purpose;
- ★ improve their professional knowledge and skills so that their performance will better serve others;
- ★ demonstrate concern for the interests and well being of individuals affected by their actions;
- ★ value the privacy, freedom of choice and interests of all those affected by their actions;
- ★ foster cultural diversity and pluralistic values, and treat all people with dignity and respect;
- ★ affirm, through personal giving, a commitment to philanthropy and its role in society;
- ★ adhere to the spirit as well as the letter of all applicable laws and regulations;
- ★ advocate within their organizations, adherence to all applicable laws and regulations;
- ★ avoid even the appearance of any criminal offense or professional misconduct;
- ★ bring credit to the fundraising profession by their public demeanor;
- ★ encourage colleagues to embrace and practice these ethical principles and standards of professional practice; and
- ★ be aware of the codes of ethics promulgated by other professional organizations that serve philanthropy.

## **STANDARDS OF PROFESSIONAL PRACTICE:**

Furthermore, while striving to act according to the above values, AFP members agree to abide by the *AFP Standards of Professional Practice*, which are adopted and incorporated into the *AFP Code of Ethical Principles*. Violation of the *Standard* may subject the member to disciplinary sanctions, including expulsion, as provided in the AFP Ethics Enforcement Procedures.

### **Professional Obligations:**

1. Members shall not engage in activities that harm the member's organization, clients, or profession.
  2. Members shall not engage in activities that conflict with their fiduciary, ethical and legal obligations to their organizations and their clients.
  3. Members shall effectively disclose all potential and actual conflicts of interest; such disclosure does not preclude or imply ethical impropriety.
  4. Members shall not exploit any relationship with a donor, prospect, volunteer or employee for the benefit of the member or the member's organization.
  5. Members shall comply with all applicable local, state, provincial, federal, civil and criminal laws.
  6. Members recognize their individual boundaries of competence and are forthcoming and truthful about their professional experience and qualifications.
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#### ***Solicitation and Use of Philanthropic Funds:***

7. Members shall take care to ensure that all solicitation materials are accurate and correctly reflect the organization's mission and use of solicited funds.
8. Members shall take care to ensure that donors receive informed, accurate and ethical advice about the value and tax implications of contributions.
9. Members shall take care to ensure that contributions are used in accordance with donors' intentions.
10. Members shall take care to ensure proper stewardship of philanthropic contributions, including timely reports on the use and management of such funds.
11. Members shall obtain explicit consent by the donor before altering the conditions of contributions.

#### ***Presentation of Information:***

12. Members shall not disclose privileged or confidential information to unauthorized parties.
13. Members shall adhere to the principle that all donor and prospect information created by, or on behalf of, an organization is the property of that organization and shall not be transferred or utilized except on behalf of that organization.
14. Members shall give donors the opportunity to have their names removed from lists that are sold to, rented to, or exchanged with other organizations.
15. Members shall, when stating fundraising results, use accurate and consistent accounting methods that conform to the appropriate guidelines adopted by the American Institute of Certified Public Accountants (AICPA)\* for the type of organization involved. (\* In countries outside of the United States, comparable authority should be utilized.)

#### ***Compensation:***

16. Members shall not accept compensation that is based on a percentage of contributions; nor shall they accept finder's fees.
17. Members may accept performance-based compensation, such as bonuses, provided such bonuses are in accord with prevailing practices within the members' own organizations, and are not based on a percentage of contributions.
18. Members shall not pay finder's fees, or commissions or percentage compensation based on contributions, and shall take care to discourage their organizations from making such payments.

*Amended October 2004*

# The AFP Donor Bill of Rights

[Source](#)

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 assure that philanthropy merits the respect and trust of the general public, and that donors and prospective donors can have full confidence in the not-for-profit organizations and causes they are asked to support, we declare that all donors have these rights:

- I. 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.
- II. 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.
- III. To have access to the organization's most recent financial statements.
- IV. To be assured their gifts will be used for the purposes for which they were given.
- V. To receive appropriate acknowledgement and recognition.
- VI. To be assured that information about their donation is handled with respect and with confidentiality to the extent provided by law.
- VII. To expect that all relationships with individuals representing organizations of interest to the donor will be professional in nature.
- VIII. To be informed whether those seeking donations are volunteers, employees of the organization or hired solicitors.
- IX. To have the opportunity for their names to be deleted from mailing lists that an organization may intend to share.
- X. To feel free to ask questions when making a donation and to receive prompt, truthful and forthright answers.



CFRE certification serves as an impartial, third-party endorsement of your knowledge and experience of international standards in philanthropy. It adds to your credibility as a fundraiser and sets you apart from other professionals as a veritable steward of the public trust.

The CFRE certification process consists of three parts: a written application, a written examination, and an agreement to uphold a code of ethics and Accountability Standards. Individuals who wish to maintain their CFRE certification must recertify every three years.

## About the CFRE Exam

The Certified Fund Raising Executive (CFRE) Examination is designed as a generalist exam for fundraising professionals to demonstrate mastery of the six core knowledge areas related to fundraising practice: Current and Prospective Donor Research; Securing the Gift; Relationship Building; Volunteer Involvement; Management; and Accountability. The computer-based examination consists of 200 multiple choice questions. Of those, 175 questions count toward your score. The other 25 questions are questions that are being tested to make sure they are psychometrically sound. more

**All AFPNEO programs are approved for CFRE credits.** For more information about the credential as well as documentation, visit [www.afpneo.org/cfre.htm](http://www.afpneo.org/cfre.htm).

## Top Ten Reasons to Become a CFRE

1. Certification grants you more credibility. CFRE certification serves as an impartial, third-party endorsement of your knowledge and experience against international standards in philanthropy. It adds to your credibility as a fundraiser and sets you apart from other professionals.
2. Certification can improve career opportunities and advancement. CFRE certification can give you the “edge” when being considered for a promotion or other career opportunities. CFRE certification clearly identifies you as an employee who has demonstrated mastery of fundraising principles and techniques based on accepted best practices.
3. Certification prepares you for greater on-the-job responsibilities. CFRE certification is a clear indicator of your willingness to invest in your own professional development. Certified professionals are aware of the constantly changing environment around their profession and possess the desire to anticipate and respond to change.
4. Certification improves skills and knowledge. Typically, achieving CFRE certification requires training, study and “keeping up” with changes. CFRE certification showcases your individual mastery by confirming proficiency and knowledge in the field. CFRE certification also requires recertification every three years, proving you stay ahead of the curve in fundraising.
5. Certification may provide for greater earnings potential. Many fundraising professionals who have become CFRE certificants experience salary and wage increases based on their certification status. Studies show that on average CFRE certificants earn 17% more than their non-certified counterparts. In addition, CFRE certificants are in high demand internationally.
6. Certification demonstrates your commitment to the fundraising profession. Receiving CFRE certification shows your peers, supervisors and, in turn, donors your commitment to your chosen career and your ability to perform to set standards.
7. Certification enhances the profession’s image. CFRE certification program seeks to grow, promote and develop certified professionals, who can stand “out in front” as role models in the fundraising field.
8. Certification reflects achievement. CFRE certification is a reflection of personal achievement because the individual has displayed mastery of his or her field by meeting requirements and standards set in philanthropy.
9. Certification builds self-esteem. CFRE certification is a step toward defining yourself beyond a job description or academic degree while gaining a sense of personal satisfaction.
10. Certification offers greater recognition from peers. As a CFRE certificant, you can expect increased recognition from your peers for taking that extra step in your professional career.

## [www.AFPNEO.org](http://www.AFPNEO.org)



**AFP**  
Association of  
Fundraising Professionals  
Northeast Ohio Chapter

Serving members throughout northeast Ohio - Summit, Stark, Ashland, Cuyahoga, Medina, Portage, Richland, Tuscarawas, and Wayne Counties

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### Welcome to the AFP Northeast Ohio Chapter

Our mission is to foster the development and growth of fundraising professionals throughout northeast Ohio and promote high ethical standards in the fundraising profession. We do this by providing outstanding professional development programs, career-growth options, mentoring partnerships, access to resources, and opportunities to network and get involved in our philanthropic community.

### BE the CAUSE

Advance the noble professional of fundraising ...  
click here to give today!



**BECAUSE**  
ethical and effective fundraising builds trust with potential donors.



**BECAUSE**  
the next generation of fundraisers will carry on with my life's work.



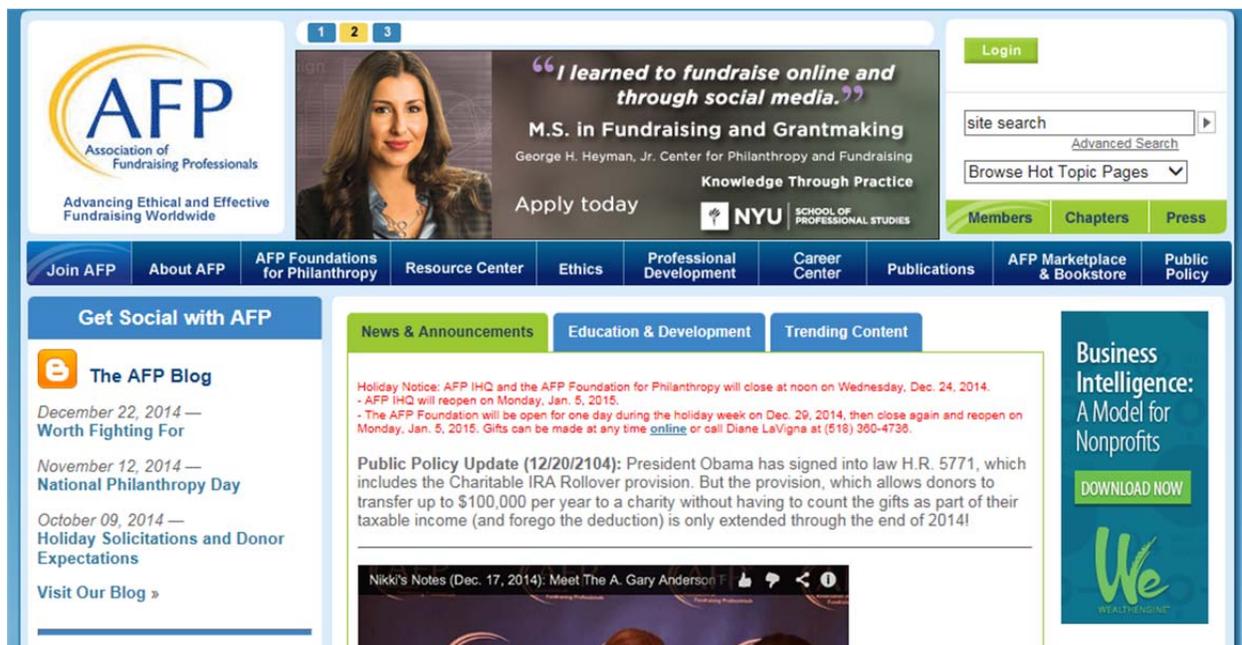
**BECAUSE**  
I want to advance the issues that affect our profession.

**Quick Links**

Save the dates for AFPNEO's professional development and networking events (please note that topics are tentative):

- Professional Development Meeting  
January 25 | 8:00 – 9:45 am:  
[Data: A Fundraiser's Best Friend](#)
- In Collaboration with Legacy Summit, Portage
- CSI 2018's [Call for Presentations](#) is your opportunity to call attention to emerging ideas, case studies, research and trends in the field, and skills you want to enhance within the profession in our community. [Click here](#) to submit your proposal.
- Show the AFP fundraisers that **you** have what they need to be fundraising superheroes! [Click here](#) to sponsor the 2018 Career Success Institute!

## [www.AFPNET.org](http://www.AFPNET.org)



**AFP**  
Association of  
Fundraising Professionals  
Advancing Ethical and Effective Fundraising Worldwide

1 2 3

**“I learned to fundraise online and through social media.”**  
**M.S. in Fundraising and Grantmaking**  
George H. Heyman, Jr. Center for Philanthropy and Fundraising  
Knowledge Through Practice  
Apply today

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### Get Social with AFP

**The AFP Blog**

December 22, 2014 — Worth Fighting For

November 12, 2014 — National Philanthropy Day

October 09, 2014 — Holiday Solicitations and Donor Expectations

[Visit Our Blog »](#)

News & Announcements | Education & Development | Trending Content

**Holiday Notice:** AFP IHQ and the AFP Foundation for Philanthropy will close at noon on Wednesday, Dec. 24, 2014.  
- AFP IHQ will reopen on Monday, Jan. 5, 2015.  
- The AFP Foundation will be open for one day during the holiday week on Dec. 29, 2014, then close again and reopen on Monday, Jan. 5, 2015. Gifts can be made at any time [online](#) or call Diane LeVigna at (518) 360-4738.

**Public Policy Update (12/20/2104):** President Obama has signed into law H.R. 5771, which includes the Charitable IRA Rollover provision. But the provision, which allows donors to transfer up to \$100,000 per year to a charity without having to count the gifts as part of their taxable income (and forego the deduction) is only extended through the end of 2014!

Nikk's Notes (Dec. 17, 2014): Meet The A. Gary Anderson

**Business Intelligence: A Model for Nonprofits**  
[DOWNLOAD NOW](#)

We WEALTHENGINE



ASSOCIATION OF FUNDRAISING PROFESSIONALS  
NORTHEAST OHIO CHAPTER

# MENTORING PROGRAM

BE A MENTOR ... LEAD & LEARN

## About the Mentoring Program ...

The Northeast Ohio Chapter of the Association of Fundraising Professionals enjoys a diverse membership of fundraising professionals. The goal of the Mentoring program is to pair seasoned professionals with people new to the field, those transitioning job responsibilities, or those searching for additional networking opportunities.

Participation as a **Mentor/Mentee** is available to ALL AFPNEO Chapter members. Mentors should have at least five (5) years of development experience while Mentees should have at least one (1).

Mentors are available to assist in a variety of fundraising areas including but not limited to:

- Donor Relationships/Stewardship
- Annual Giving/Major Gifts/Planned Giving
- Capital Campaigns
- Prospect Research
- Board Relationships/Governance/ Training
- Grant Proposals/Case Development
- Strategic Planning
- Marketing/Communications
- Telemarketing/Direct Mail Outreach
- Special Events
- Volunteer Management

The Mentoring Committee will determine the Mentor/Mentee matches based on goals, interests, and experience. The pairs will be expected to have at least six (6) conversations; conversations may be in-person, via phone and/or email. Both the Mentor and the Mentee are encouraged to keep a simple log of meetings and general discussion topics as a guide for future program evaluation.

**2019 APPLICATION DEADLINE:**

**January 31, 2019**

BE A MENTEE ... LEARN & LEAD

## Program Guidelines ...

The Mentoring Program incorporates AFP programs and services and fosters AFP ethics through the Code of Ethical Standards. The relationship is meant to be career specific and is *not* to be used or construed in any way as a consulting relationship or a job placement service. Mentors are encouraged to recommend appropriate resources, i.e. courses, workshops, educational opportunities, vendors or consultants.

Mentors/Mentees should advise their employers that they intend to participate in the program. They must respect that the information they share about their organizations is confidential in nature.

Mentors/Mentees will meet as a group at a kick-off event to launch the program. Following this meeting, Mentor/Mentee pairings will work together to develop objectives around the Mentee's areas of interest.

There will be a check-in by the Mentorship Chair at three (3) months and six (6) months to assess the match progress and to address any concerns that may arise. Additional follow-up may occur to ensure the relationship is moving forward positively. If the match is not working, the Mentorship Chair will determine if a new match will be made. A post-program survey will be sent out at the end of the calendar year.

Members of the Mentoring committee will be available to all Mentors/Mentees through group emails and other methods. Matches are for one (1) year, but may be extended informally if desired by both parties.

**APPLY ONLINE**

**[www.afpneo.org/mentoring.htm](http://www.afpneo.org/mentoring.htm)**

For more info, contact Wendy Merkert, CFRE  
[wmerkert@invent.org](mailto:wmerkert@invent.org)

The Association of Fundraising Professionals Northeast Ohio Chapter invites you to apply ...

## Chapter Scholarships

The AFP Northeast Ohio Chapter (AFPNEO) fosters the professional development of fundraising professionals and promotes high ethical standards in the fundraising profession. It is the Chapter's policy to use a portion of our net assets to offer scholarships for fundraising professionals in the eight counties we serve to increase their professionalism, knowledge, and skills by attending professional development meetings and conferences. The Chapter offers the following scholarships.

**Members of AFPNEO** are eligible to apply next year for a full scholarship to the **Career Success Institute** (a \$75 value). The application deadline will be announced early 2019.

**Members of AFPNEO** are eligible to apply for a half scholarship to the **Fundamentals of Fundraising Course** (a \$200 value). The review course be scheduled later in 2018 and announced in our email broadcasts. The application deadline is **June 1**.

**Both members and non-members** may apply for the **National Membership** scholarship. The scholarship will cover the recipient's national dues for one year (up to a \$250 value), and the recipient is expected to pay the local chapter's \$35 dues. All scholarships granted to current members will become effective once their current membership has expired. The spring application deadline is **May 4**, and the scholarship is offered again in fall with a **September 1** deadline.

**Members of AFPNEO** are eligible to apply for the **Chamberlain Scholarship**, which provides a free registration to the AFP International Conference (actually, you pay \$10) and \$1,000 towards travel expenses (a \$1,690 value). The application deadline is **October 2**.

### Additional criteria:

1. Applicants must be employed by a 501(c)(3) nonprofit organization/registered charity with at least 50% of time devoted to fundraising work.
2. Only one individual from an organization may be selected for any one scholarship.
3. Applicants must not have received any other Chapter scholarship during the previous calendar year.
4. Applicants must have attended at least three meetings within one year prior to applying for a scholarship.
5. Membership scholarship recipients who attend at least three meetings within one year of receiving the scholarship will receive a 50% membership scholarship the following year.
6. Award recipients will be asked to serve on one committee within one year of receiving the scholarship.
7. Award recipients may be asked to demonstrate the impact of their scholarships (i.e. brief presentation at a Chapter professional development event or short written testimonial for the newsletter, website, etc.).
8. Scholarship recipients will be required to complete an evaluation within one year of receiving the scholarship.

Visit our website for more details and to apply:  
[www.afpneo.org](http://www.afpneo.org)

The Association of Fundraising Professionals Northeast Ohio Chapter invites you to apply ...

## Chamberlain Scholarship

**Application Deadline: October 2<sup>nd</sup>**



Barb Mucci, CFRE,  
2018 Chamberlain  
Scholar

Every year, the AFP Foundation for Philanthropy awards one Chamberlain Scholarship to each AFP chapter for an individual to attend the International Conference. The scholarship is named for Ralph Chamberlain, who was instrumental in starting the organization we now know as the Association of Fundraising Professionals.

The Chamberlain Scholarship is designed to help individuals serving nonprofit organizations develop their knowledge and skill in fundraising.

**The 2019 Conference will be held in San Antonio TX from March 31 – April 2, 2019.**

The Chamberlain Scholarship covers the conference registration fee for the recipient (minus a nominal \$15 registration fee) – a \$1,690 value. The AFP Northeast Ohio Chapter provides an additional \$1,000 to help defray the expenses of travel and accommodations. The Chamberlain Scholar is responsible for registering for the Conference and for making all travel and lodging arrangements.

There are two requirements for the Foundation Chamberlain scholarship: (1) Applicants must be AFP Northeast Ohio Chapter members; and (2) Applicants must never have attended an AFP International conference. Preference will be given to new professionals to the field of fundraising – especially those with less than 3 years of experience.

For more information about scholarship opportunities, visit our website or contact the Scholarship Committee Chair Mella Castner at [mellac@akronymca.org](mailto:mellac@akronymca.org).

Visit our website for more details and to apply:





# NATIONAL PHILANTHROPY DAY AWARDS

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The Association of Fundraising Professionals Northeast Ohio Chapter will celebrate National Philanthropy Day (NPD) on November 2, 2018. Join us in using this opportunity to show your appreciation for the many accomplishments that have been made in the name of giving. Nominating an individual or organization is your chance to shine the spotlight on the people who truly make a difference and remind our communities that the spirit of giving is alive and well. This is a wonderful way to honor an individual or an organization who has made a significant contribution to your organization and the community. Let NPD help you say “thank you!”

The NPD Nominations Committee is seeking nominations for awards in the following categories to be presented at this year’s luncheon celebration:

**Small Business Leadership Award:** This award is presented to a business with 100 employees or fewer that has demonstrated outstanding commitment to the community through financial support and volunteerism. The business encourages and motivates others to take philanthropic leadership roles in the community.

**Corporate Leadership Award:** This award is presented to a business or corporation of any size that demonstrates outstanding philanthropic commitment through financial support and community involvement. The corporation contributes direct financial support for projects, programs, and/or capital improvements to multiple northeast Ohio nonprofit organizations, in addition to participating in volunteer community activities.

**Foundation Leadership Award:** This award is presented to a philanthropic foundation that contributes financial support to multiple northeast Ohio nonprofit organizations. The foundation’s impact includes support for innovative approaches to solving problems in the community.

**Outstanding Volunteer Fundraiser Award:** This award honors an individual or family who demonstrates outstanding skills coordinating and motivating groups of volunteers for nonprofit fundraising initiatives. The recipient(s) have exceptional leadership skills coordinating groups of volunteers for major fundraising projects, ideally for more than one nonprofit organization.

**Outstanding Philanthropist Award:** This award honors an individual or family with exceptional generosity who, through direct financial support, demonstrates outstanding civic and charitable responsibility and whose generosity encourages others to take philanthropic leadership roles in the community. In addition, the individual or family encourages and motivates others to take leadership roles in philanthropy (i.e. challenge gifts, matching gifts, volunteering, etc.).

**Youth in Philanthropy Award:** This award recognizes service by a child or group of children in grades K-12 who demonstrate commitment to the community through direct financial support, volunteering, and/or leadership in philanthropy. The child or group of children devotes time, talent, and/or treasure to creatively support a nonprofit and is responsible for the creation, orchestration, and results of this project. Special consideration will be given to the child or group whose work is ongoing.

**Special Recognition Award:** This award is presented to an individual, family, or group whose philanthropic contributions are unique and impactful and whose work supporting a nonprofit organization or cause is innovative.

**Lifetime Achievement Award:** This award recognizes an individual who serves as a role model for philanthropy through his or her history of sustained volunteer and financial giving. He or she is also active in passing along the value of philanthropy to future generations. To be awarded this distinction, the individual must have been honored in another category in previous years.

**Nominators must be members of the AFP Northeast Ohio Chapter; only one nomination may be submitted per member.**

Completed nomination forms are due June 15th. If you have questions, please contact Kristie Woods at [kwoods@refugeofhope.org](mailto:kwoods@refugeofhope.org).

Thank you for your continued support of the Association of Fundraising Professionals and your commitment to philanthropy in Northeast Ohio.

Visit our website for more details and to nominate:  
[www.afpneo.org/npd.htm](http://www.afpneo.org/npd.htm)



As you know, the AFP Northeast Ohio Chapter has supported development professionals through educational programs and initiatives, diversity in the fundraising profession, promoted a Universal Code of Ethics and much, much more for more than 30 years. This success would not be possible without the annual support of our Chapter membership through the **BE the CAUSE (BTC) campaign** ([www.afpneo.org/donate.htm](http://www.afpneo.org/donate.htm)).

This year's BTC Chapter goal is \$3,700. With your help, we can exceed this milestone.

The BTC Campaign is one of the most significant means for supporting and advancing our profession. By supporting BTC, our members receive the following direct benefits:

- **Scholarship support:** A portion of your BTC contribution is used to provide scholarship support for Chapter members to attend the AFP International Conference and local programs such as the Career Success Institute (CSI).
- **Funding for programs:** The Chapter reinvests funds into professional development programs that directly benefit our members as well as help to attract new members.
- **Advocacy:** Members' professional organizations benefit from the government relations and advocacy work conducted by AFP International.
- **Web resources:** Recognizing the value of an effective website, the Chapter invests in its website ([www.afpnco.org](http://www.afpnco.org)) to enhance our communication with members and your ability to easily access information. In addition, the AFPI website ([www.afpnet.org](http://www.afpnet.org)) and Fundraising Resource Center provide valuable research information to members.

**We are pleased to report 100% board participation for this year.**

Please make your gift to the Campaign today by (1) emailing your pledge to [info@afpneo.org](mailto:info@afpneo.org) (you can pledge now and pay by December 15th); (2) making your gift online at [www.afpneo.org/pay.htm](http://www.afpneo.org/pay.htm); or (3) mailing your check with enclosed pledge form to PO Box 1286, Bath OH 44210.

Thank you in advance for supporting this effort as an investment in your own professional development and that of your colleagues who serve our communities each and every day.

Sincerely,

A handwritten signature in blue ink that reads 'Jo Ann Carpenter'. The signature is written in a cursive, flowing style.

Jo Ann Carpenter

Chair, BE the CAUSE Member Campaign



## GET INVOLVED – JOIN A COMMITTEE

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The best way to maximize the benefits of membership is to become actively involved in a committee. Following is a list of available committees and responsibilities; please feel free to contact the committee chair if you are interested.

### Membership

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**Chair: Carol Hawk - [chawk@pathwaycfc.org](mailto:chawk@pathwaycfc.org)**

The Membership Committee strives to increase chapter membership. Responsibilities include:

1. Report to the Chapter President, Board of Directors and membership at regular intervals;
2. Prepare and execute a membership recruitment and retention plan that includes member diversity;
3. Provide list of new members to the Board at each regular Board meeting;
4. Develop a program to welcome new members and encourage their participation in chapter activities;
5. Act as liaison between the Chapter President and AFP International Headquarters on membership matters, reconciling Chapter and Association membership records;
6. Follow up on any membership-related correspondence received from AFP International Headquarters;
7. Keep up to date with the online membership reporting system; and
8. Work with the Chapter Administrator to keep the membership roster continuously up to date and provide AFP International Headquarters with any address corrections or discrepancies.

### Professional Development

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**Chairs: Barb Mucci, CFRE - [barb.mucci@aultman.com](mailto:barb.mucci@aultman.com) & Brian Reitz - [breitz@akroncf.org](mailto:breitz@akroncf.org)**

The Professional Development Committee strives to meet the educational needs of chapter members and others in the community. Responsibilities include:

1. Develops and executes educational programs for the membership meetings of the Chapter by establishing a consistent, suitable location for monthly meetings and maintaining a good working relationship with hotel/catering staff
2. Oversees all Chapter programming, including but not limited to the Career Success Institute
3. Encourages involvement of members in Chapter events;
4. Ensures Ten Star Award criteria is met by including at least one program each year on Ethics and Diversity;
5. Develops programs that respond to the educational needs of Chapter members and others in the community;
6. Works with the Communication Chair to publicize programs;
7. With the Chapter Administrator, maintains program records including description, speakers, attendance, evaluation, and revenue; and
8. Provides general guidance to the Career Success Institute Committee.

## Career Success Institute

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**Chairs: Dawn Moeglin - [dmoeglin@vantageaging.org](mailto:dmoeglin@vantageaging.org) & Angela Palomba - [apalomba@thefirstteecanton.org](mailto:apalomba@thefirstteecanton.org)**

The Career Success Institute Committee plans the major educational event for the chapter. Responsibilities include:

1. Procure keynote and session speakers on topics relevant to fundraising;
2. Coordinate event production details, including site location and program;
3. Develop a communications plan to promote and market the CSI event throughout the nonprofit community to increase participation in CSI;
4. Actively solicit CSI sponsorships;
5. Prepare a proposed budget for review by the Chapter Board;
6. Work with the Chapter Administrator to prepare and execute a successful event; and
7. Communicate with the Professional Development Chair to share speaker/presenter ideas.

## National Philanthropy Day

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**Chairs: Vi Leggett - [vleggett@aultman.com](mailto:vleggett@aultman.com) & Sara Lundenberger - [sara@dotorgsolutions.com](mailto:sara@dotorgsolutions.com)**

The National Philanthropy Day chairs work to create a committee that is responsible for all aspects of the chapter's annual NPD program, including awards, sponsorship, and event planning. The National Philanthropy Day Committee plans the major community event for the chapter. Responsibilities include:

1. Manage NPD nominations and awardee selection;
2. Coordinate event production details, including site location and program;
3. Develop a plan to promote and market the NPD event within the community to increase public awareness of and participation in NPD;
4. Actively solicit NPD sponsorships;
5. Prepare a proposed budget for review by the Chapter Board;
6. Report chapter award recipients to AFP International Headquarters for recognition at the AFP International Conference on Fundraising; and
7. Work with the Communications Chair to place articles on National Philanthropy Day.

## Communications

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**Chairs: Paula Mastroianni - [pmastroianni@starklibrary.org](mailto:pmastroianni@starklibrary.org) & Angela Perisic - [angela.perisic@uwstark.org](mailto:angela.perisic@uwstark.org)**

The Communications Committee develops and carries out public service, publicity, and public relations consistent with the Chapter strategic plan. All chapter material will use inclusive language and imagery to reflect our members' diversity. Responsibilities include:

1. Coordinate the gathering of information for all printed materials, including newsletters, the Chapter annual report, and other communications to Chapter members and prospects;
2. Manage the social media of the Chapter (Facebook and LinkedIn);
3. Work with Public Affairs Department at AFP International Headquarters;
4. Develop a list of local and regional media representatives and manage relationships with members of the media; and
5. Write and distribute press releases on a regular basis.

## Mentoring

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**Chairs: Wendy Merkert - [wmerkert@invent.org](mailto:wmerkert@invent.org) & Pam Holtz - [psholtz@akronzoo.org](mailto:psholtz@akronzoo.org)**

The Mentoring Committee coordinates the peer-sharing program of the chapter in order to advance the careers of new and transitioning fundraising professionals. Responsibilities include:

1. Actively solicit both mentors and mentees from the membership;
2. Review applications to determine the Mentor/Mentee matches based on goals, interests, and experience;
3. Check in with participants at three to six months to assess the match progress and to address any concerns that may arise; and
4. Evaluate the progress of the program at the end of the match year.

## Diversity

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**Chair: Cynthia Sheeks - [csheeks@uakron.edu](mailto:csheeks@uakron.edu) & Julie Katz - [Julie\\_Katz@jewishakron.org](mailto:Julie_Katz@jewishakron.org)**

The Diversity Committee strives to increase the chapter's strength by building diversity in membership and programming. Responsibilities include:

1. Identify and promote the chapter's diversity goals;
2. Assist the Membership Committee in responding to the needs of diverse members and potential members;
3. Assist the Professional Development Committee in providing educational programs that promote diversity;
4. Encourage involvement of members in promoting diversity in the chapter and in their own organizations; and
5. Monitor and report on the progress of the chapter's diversity goals in the eNewsletter, at board meetings, and in the annual Chapter Diversity Report required by AFP International.

## BE the CAUSE Campaign

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Chair: Jo Ann Carpenter - [jcarpenter@refugeofhope.org](mailto:jcarpenter@refugeofhope.org)

The “BE the CAUSE” Campaign Committee works to ensure 100% Board participation and solicits participation from the general membership with the goal of meeting the Chapter’s AFP EMC goal. The Committee also coordinates the “BE the CAUSE” Campaign with the AFP Foundation. Responsibilities include:

1. Educate Chapter members about the activities of the AFP Foundation for Philanthropy;
2. Conduct the Chapter's “BE the CAUSE” Campaign;
3. Manage annual EMC goals:
4. 100% Board participation; and
5. Attainment of AFP International Headquarters Chapter goals to ensure the Chapter receives its EMC reimbursement.
6. Serve as liaison between the Chapter and AFP Foundation for Philanthropy;
7. Provide recognition to Chapter donors; and
8. Check donor reports for accuracy and resolve discrepancies with AFP Foundation for Philanthropy staff.



## Committee Contacts

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★ **Membership**

Contact: Carol Hawk  
[chawk@pathwaycfc.org](mailto:chawk@pathwaycfc.org)

★ **Professional Development**

Contact: Barb Mucci, CFRE  
[barb.mucci@aultman.com](mailto:barb.mucci@aultman.com) &  
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★ **Career Success Institute**

Contact: Dawn Moeglin  
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★ **Scholarships**

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★ **National Philanthropy Day**

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★ **Mentoring**

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★ **Diversity**

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★ **BE the CAUSE Campaign**

Contact: Jo Ann Carpenter  
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★ **Government Relations**

Contact: Marian Calvin  
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★ **Directorship Committee**

Contact: Kristie Woods  
[kwoods@stllc.org](mailto:kwoods@stllc.org)

## Chapter Administrator

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# 2018 Board of Directors

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Vice President, Community Engagement

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