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WSPN mission:

Offering support to development professionals and advancing philanthropy since 1986.

4 Basics for Building Planned Giving

By David Terrill

Does your nonprofit have what it takes to build a good (or even great) planned giving program? Like when creating a strong building, a successful planned giving program must be built on a solid foundation of basic elements.

leave your
**lasting
legacy**

1. Loyal Donors – The most likely donors to make a major or planned gift are loyal donors who understand your mission as well as its immediate needs. That's why they continue giving. Who are loyal donors?

I'd suggest screening for a 10-year span of fairly regular gifts, not necessarily uninterrupted gifts. Cultivating selected loyal donors in a personalized and sustained fashion will lead to major and planned gifts. Start by determining the number of prospects who you are able to cultivate in this focused way.

Example: When first starting the gift-planning program at Brookfield Zoo, I had a modest budget for marketing materials to prospects. How many loyal donors could I send a postal mailing? By running reports on who had given fairly regularly over different spans of years, I found that my budget could support an initial mailing to those who had given

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Through Thick and Thin

Building successful donor campaigns

By Ron Rescigno

I come across many organizations that have not invested in an individual giving program. They're in it for the "quick fix"—the promise of immediate big money.

The organization, however, that understands fundraising realizes that effective individual giving programs rely upon the creation of a system or long-term plan.



Here's an example of how that works: a gift from an individual donor via a direct mail campaign opens the way for inviting donors to a special event. That donor's enjoyment

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WSPN mission:

Offering support to development professionals and advancing philanthropy.

WSPN core services:

EDUCATION, NETWORKING and ADVOCACY

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We invite your membership. Annual, non-transferable dues are \$40. Register online or make checks payable to West Suburban Philanthropic Network and mail to:

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President's Message

Focus

The holiday season is in full swing, which for most of us also means so is the personal and professional juggling act that comes with it. We balance deadlines at work, holiday parties, travel and the endless shopping.

As development professionals, we affectionately call this "the busy season," although none of us can truly point to the time of year we call the "slow" season.

Busy schedules aside, we are fortunate this time of year to engage with hundreds of partners supporting our mission who are helping make the western suburbs a better place. And yet, we may feel at times much like the Stretch Armstrong doll that kids clamored for in the holiday seasons of our youth—pulled in so many directions that we fear we might break.

So while time appears to be running out to write the year-end appeal, prepare for that board meeting, plan the holiday office party, bake for the cookie exchange and finish the holiday shopping, I'd like to issue a challenge.

At a time of year meant to be spent with loved ones, let's make a little more time for ourselves in order to ensure we have enough energy to enjoy those moments.

This past year has been especially busy for me, and while I am incredibly thankful for the opportunities I've received, it is hard not to also feel guilty that I am missing out on the good stuff.

A friend I greatly admire recently shared with me learnings she has adopted from "The One Thing" by Gary Keller. While I have not yet read the book, the takeaway for me was *focus*.

When we try to do too much, we often feel we don't accomplish anything. Instead of making your typical to-do list this week, I challenge you to try this: Choose one thing each day. Pick one thing that you must do that day and do it first—when you are the most productive



and focused. Accomplishing an important task early in the day will give you a surge of positive energy that will carry you through the rest of your day, and perhaps lead to an even more productive day.

Then, at the end of the day, turn it off and go home. Spend time with your family, friends or pets or do something that makes you happy.

As part of the nonprofit community you do important work. You make a difference and you help care for our neighbors. Don't forget to care for yourself this holiday season.

As human beings, we are not perfect, so let's grant ourselves a little bit of grace. While easier said than done, giving focus a shot is worth it if it means being happier and more able to enjoy the good stuff, right?

Happy holidays!

Maeven Sipes

Philanthropy Collection News

New: Funding Pathways

By Christine Kickels, Librarian
College of DuPage's Philanthropy Collection

Now you can quickly identify a prospect list based on common funders through Funding Pathways. A new feature from the Foundation Center, Pathways is your direct connection to foundations who have already expressed an interest in funding causes like yours, as well as to potential partners who share funding sources with you.

Simply enter the name of a nonprofit or foundation, and you'll be able to see their recent funding activity, leading to an automatic prospect list to kick off your grant fundraising. Find Funding Pathways in the Foundation Directory database available in the Library.

In addition, we recently added new books on grant writing, fundraising planning and voluntarism. Your COD Library card lets you take these with you for four weeks.

- **Nonprofit Board Service for the GENIUS** by Susan Schaefer and Bob Wittig
- **Nonprofit Fundraising 101: A Practical Guide and Easy to Implement Ideas & Tips from Industry Experts** by Darian Rodriguez Heyman
- **Grant Writing for Dummies** by Beverly Browning
- **The Nonprofit Fundraising Solution: Powerful Revenue Strategies to Take You to the Next Level** by Laurence Pagnoni
- **Measuring the Impact of Volunteers: A Balanced and Strategic Approach** by Christine Burych et al.

The Philanthropy Collection is located on the upper floor of the Library and is open to the public. If you live or work in DuPage County you are also eligible for a COD Library card so that you can borrow materials. For an introduction to the print and online resources, contact me to make an appointment at kickels@cod.edu.

Need more info? Watch our 15-minute intro at <http://tinyurl.com/codpc2016>. ●



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West Suburban
**Philanthropic
Network**

Editor's Note

Dear *Cultivate* readers:

WSPN has had a fantastic year of offering exceptional programs and professional networking opportunities. Thank you for your participation, interest and support.

Please consider submitting nominations for the Annual Philanthropy Awards Luncheon. The luncheon provides an excellent opportunity to highlight inspirational individuals and organizations that do so much to enhance our community.

As 2016 draws to a close, we wish you a blessed holiday season and a happy and healthy New Year.

Sincerely,



Jill McWilliams

Thank you to *Cultivate* proofreaders Janisa Hicks, Sarah Kimes, Sarah Lichtenwalter and Evan Munch.

Advertising in *Cultivate*

A limited number of business-card size (3.5x2 inches) advertising spaces are available in *Cultivate*.

\$190 - four issues

\$160 - three issues

\$125 - two issues

\$ 70 - one issue

\$325 - double ad size, four issues

\$475 - four-issue insert ad (8.5x11)

To place an ad, visit <https://tinyurl.com/ookj7vk>.

Please consider our advertisers when seeking services. Their ad fees help with the production costs of our award-winning publication.

WSPN's 2017 PHILANTHROPY AWARDS

Call for Nominations

WSPN calls for nominations in eight philanthropic categories for its **15th Annual Philanthropy Awards Luncheon at 11 a.m. on Tuesday, May 23 at the Embassy Suites, Naperville**. The awards program will recognize and celebrate those individuals, businesses, foundations and organizations that provide so much to sustain and enhance the rich philanthropic environment that is fundamental to the quality of life in the western suburbs.

Categories consist of:

- **Philanthropic Leadership Award** - Presented to an individual who has provided extraordinary leadership and resources or financial support to significantly impact the culture of philanthropy of one or more nonprofits or causes within the western suburbs.
- **Humanitarian of the Year** - Presented to an individual who has demonstrated an extraordinary humanitarian effort in making a major impact on the quality of life in the western suburbs.
- **Corporate/Foundation/Service Club Philanthropic Award** - Presented to an organization that has demonstrated commitment to the western suburbs through financial support, leadership and volunteerism.
- **Nonprofit Executive of the Year** - Presented to a senior-level nonprofit executive (does not have to be the executive director) who has demonstrated exceptional leadership in advancing the mission and services of his or her organization for the benefit of residents in the western suburbs.
- **Grantmaker of the Year** - Presented to a corporate or foundation philanthropic officer who has represented the donor organization with professional leadership while providing exceptional assistance to the west suburban nonprofit community.
- **Nonprofit Volunteer of the Year** - Presented to an individual whose volunteerism has profoundly impacted programming and/or philanthropy of the local charity with which the individual serves as a volunteer.
- **Young Philanthropist Award** - Presented to a youth leader or leaders who have exemplified commitment and dedication in helping the advancement of their local community in the western suburbs within the past two years.
- **WSPN Distinguished Service Award** - Presented to a WSPN member whose efforts have helped to significantly advance the mission of WSPN.

The deadline for submitting nominations is 5 p.m. Friday, January 27, 2017. All nominations must be written in the form of a nomination letter and emailed to Jessica Noe, jnoe@feedingamerica.org, or mailed to Feeding America, 35 E. Wacker Dr, Suite 2000, Chicago, IL 60601.

Nomination letters should be 1-2 pages and must include the below items. Samples of past winning nomination letters are available for reference at www.wspnonline.org.

- A detailed list of the nominee's philanthropic accomplishments in the western suburbs, citing specific examples of the nominee's fulfillment of the award category criteria.
- A list of the nominee's achievements.
- Biographical information including the nominee's address, phone, email and relevant professional experience.
- Optional: Include supporting materials that may include copies of articles or reports.

Honorees and their nominators will be notified in February. Reservations for the luncheon will be accepted beginning in February. Individual tickets are \$50 per person and sponsorship opportunities are available from \$500 to \$5,000. (Honorees will receive two complimentary tickets.)

For more information, please contact Jessica Noe at jnoe@feedingamerica.org. ●

Child's Voice: Celebrating 20 Years of Smiles, Laughter & Language



You'll be hearing from us!

For 20 years, Child's Voice has been changing the lives of children with hearing loss and their families. Through expert educational programming and consistent access to sound through a hearing aid and/or cochlear implant, Child's Voice students learn to listen, to speak and to succeed. Parents receive support, education and an opportunity to provide their child with hearing loss the educational services needed for a lifetime of learning.

When a family begins their adventure with their newborn child, that little one began listening even before they were born ... learning the sounds of their mother, hearing her voice and heartbeat. Those early moments and following days and years are spent absorbing all the sounds and voices around them. When an infant/toddler is diagnosed with hearing loss, they have lost that early exposure to sound. That child is now working to close the gap in early learning. With the amazing and continued advancements in technology, early identification and early intervention services, children with hearing loss can develop the skills to listen and speak.

Overview of Child's Voice:

Child's Voice partners with families with the end goal of preparing each student to move into their neighborhood school districts and attend local, mainstream schools. Child's Voice programs focus on the mission of empowering children with hearing loss to be successful in all educational and social settings by optimizing their listening, speaking and academic skills.

Child's Voice is the only private school in northern Illinois that supports this underserved population and provides specialized deaf education to children and their families.

Child's Voice Programs:

- Early Intervention Program – Provides a foundation of listening and spoken language skills to children from birth through three years old.
- School Program – A school-age, classroom-style, listening and spoken language program for children aged 3-8. Students receive an intensive classroom education focused on language and auditory skill development as well as key academic components and social interactions.
- Outreach and Support Programs – Follows School Program graduates for two years in their neighborhood schools (ages 5-9) and throughout their educational career to ensure success and provides support. Other services include alumni testing opportunities, offering resources to meet their educational, listening and spoken language needs, social work services and auditory-verbal therapy.
- Audiology Center – Provides services to all children in the School Program as well as many of those attending the Toddler Group in the Early Intervention Program. Services include diagnostic testing, evaluation and device support. Additionally, the Pediatric Early Hearing & Intervention (PEHDI)* Program offers diagnostic testing and screenings to improve the follow up of families with newborns/infants at risk for hearing loss and increasing the timeliness of diagnosis when a loss is present.

Child's Voice serves the greater metropolitan Chicago area and surrounding suburbs and communities. This year, Child's Voice anticipates serving nearly 250 children and their families. Annually, Child's Voice works with over 35 different school districts and nearly a dozen child and family connections providers (early intervention providers) across 82 Chicago area zip codes.

Since loss does not occur based on socioeconomic situations,

Child's Voice serves a variety of families across socioeconomic levels, family settings and geographic locations. Currently, they serve many families that are economically disadvantaged, of racial and ethnic minority and uninsured. Because their home-based services occur within homes, their therapy focuses on parent coaching and guidance.

Many families of racial and ethnic minorities speak languages other than English. To meet the needs of these families, language plans ensure that children are exposed to language (often in multiple languages) throughout the day/week.

When children leave Child's Voice, they are better prepared for success. The curriculum and therapies provide the building blocks needed for these children to achieve great things. The wonderful success of the many Child's Voice graduates is due, in large part, to the early education they received at Child's Voice. They often say that a future President walks their hallways. These students are joined by future teachers, doctors, community leaders ... and we know you'll be hearing from them.

20 Years of Smiles

Child's Voice invites you to join in celebrating 20 years by sharing #SmileyCV20, an awareness campaign using pictures of the Child's Voice logo "smiley" face across the Chicago area and many exciting destinations. Please visit www.childsvoice.org to learn more. And to find out more about #SmileyCV20's travels, be sure to follow Child's Voice on Facebook, Instagram and Twitter. ●



Blasts From the Past - Program Highlights

By Jill McWilliams, *Cultivate* editor

Ask the Grantwriter



Nathan Medina, Cathy McCann, Margaret Rush and Catherine Voigt

On Sept. 15 at the DuPage County Historical Museum, **Cathy McCann**, Chicago program officer of Topfer Family Foundation, moderated a panel of grant writers including **Nathan Medina**, director of foundation relations of Lydia Home Association; **Margaret Rush**, foundation relations and grant writer of DuPage Children's Museum; and **Catherine Voigt**, account executive/grant writer of Conlon & Dunn Public Strategies.

Research tips:

- Supplement your foundation database search results with additional web research, GuideStar's 990s, and the foundation's website for the most updated information and application guidelines.
- College of DuPage offers free search options and resources for grantseeking.
- Subscribe to Philanthropy News Digest's alerts to receive RFP information, job opportunities and other relevant news.
- Explore who funds organizations similar to yours.

When to apply:

- Create a grants calendar and sort by priority and by application deadlines.
- Explore board connections. Could someone make an introduction for you?
- When appropriate, call the funding agency with any questions.
- Determine if the time required for application is worth the return in funding.

When turned down:

- Send a thank you note.
- Request feedback and assess if reapplication is viable.

- If no feedback is received, still try to reapply about two more times.

Communicating reasonable expectations of grant seeking:

- Nonprofits receive about 75% of donations from individuals and about 15% from foundation support. Continue major gift cultivation as a primary source of funding.

Donor Communications Plan, Part II



On Oct. 20 at The Morton Arboretum in Lisle, **Dusty Holoubek**, founder of My Marketing Tech, and **Scott Curran**, founder of Beyond Advisors, led a training session on marketing your organization in an economic and efficient way.

Their takeaways for planning an effective marketing strategy include:

It's not a race. Nonprofits need to craft a mission statement that is unique and clear. Tell the story about how your organization's mission was

developed, and tell the story in a thought-provoking way. Share how donors' dollars are used to make a difference in your organization and why those dollars matter.

Establish your brand and website first. Only then begin to use social media to deliver your message. Social media is a tool that should generate awareness and drive traffic to your website. Use it as a funnel to draw donors and volunteers to your website to donate their dollars and time. Going in reverse order only leads users to a black-hole of no information.

Photos and video are everything to users with smart devices. The average household has at least three smart devices, so it's no wonder 65% of users of video lead to a conversion or purchase. Consider investing in video production or hire an outside marketing consultant like mymarketingtech.com to learn about cost-efficient tools your in-house team can use to piece together photos and audio into a video.

Facebook should be common ground for nonprofits. If you have not tapped into Facebook for Nonprofits, you need to activate your presence today. With the option to add a "Donor" button to your page or embed donor capabilities into your posts, users can instantly make a contribution; share that they have made a contribution or share fundraisers nonprofits are conducting.

Not everyone will succeed. If all fundraising were successful, we wouldn't need philanthropy anymore. Measure the initiatives

that matter to your organization, discover what's working and what's not and build on that. When in doubt, ask! If you have questions on growing a more sustainable organization or want to create more impactful programs, Beyond Advisers can assist in these efforts.

2nd Annual Partners in Philanthropy Day

The Art of Securing Planned Gifts: Myth-busting the Magic



On Nov. 2, **Bryan Clontz, CFP®, CAP®,** co-founder and president of Charitable Solutions, LLC, presented an interactive workshop about developing a successful, step-by-step action plan for implementing a planned giving program and debunked the perceived obstacles of planned giving.

Our second annual **Partners in Philanthropy Day** was offered in partnership with the Suburban Chicago Planned Giving Council and the SouthWest Suburban Philanthropic Network, and was hosted at Lisle/Naperville Hilton in Lisle.

Clontz's planned giving strategies include:

- Gifts through wills and by beneficiary designations comprise 90% of all gifts. Is your nonprofit benefiting from these gifts? Keep terminology simple by saying, "Please remember our organization in your will or estate plan." Using the word bequest could sound more complicated than it is.
- Use a three-pronged approach to bequest prospecting:
Level 1: Strive for 100% participation of current board members to include your nonprofit in their estate plans. Next, ask past board members, friends and staff to "Join me" in the goal.
Level 2: Reach out to long-term donors and volunteers.
Level 3: Ask your general donor community to include your organization in their wills.
- The least tax-efficient way to give a gift is through cash. Therefore, advise donors that optimal giving occurs through long-term capital gain assets and estate gifts through beneficiary designation. For the same net cost, through tax savings, a nonprofit could receive a 50% larger gift.
- Clontz asserts, if your organization isn't receiving 20% of its operating costs from your endowment by 2025-2030, you will cease to exist. Why? Because 125 new nonprofits are formed daily and the competition for the same amount of dollars is more competitive. Build your endowment through planned gifts.
- The world doesn't need another special event. For example, The Salvation Army doesn't focus on special events; instead, they send out planned giving officers.
- For every confirmed planned gift, there are four in the pipeline you don't know about. Bottom line, keep asking. ●

PhilanTopic Resources

Planned giving

- **Planned Giving Design Center**
www.pgdc.com – Free articles, technical reports and planned giving calculator.
- **Giftlaw Pro**, www.giftlaw.com – Free articles and technical reports.
- **Planned Giving Council Members Listserve**, plannedgiving@yahoo.com

Free conference calling

www.freeconferencecall.com
Truly free and you can even record calls or open up a webinar and share your screen.

Network for Good

www.networkforgood.com
Offers a free Fundraising Resources Library including eBooks and webinars. Learn about everything from mobile to social media to fundraising to behavior economics.

Digital tools

- **YouTube** recently developed pop-up "donation cards" that video creators can embed in posts to the site. With the cards, anyone can use YouTube to raise money for a registered nonprofit, which will receive 100 percent of donations.
- **Facebook** unveiled a "donate now" button that nonprofits can put on their pages to link to their donation websites.

3 Books Fundraisers should read

- **Made to Stick: Why Some Ideas Survive and Others Die** by Chip Heath and Dan Heath
- **Contagious: Why Things Catch On** by Jonah Berger
- **Story Trumps Structure: How to Write Unforgettable Fiction by Breaking the Rules** by Steven James (As with fiction, nonprofits realize that without a problem there is no story.)

Share your resources:

Do you have favorite resources you would like to share with *Cultivate* readers? Please email them to jillm@elmhurst.edu.

Member News



Jamie Duffy is celebrating her one-year anniversary as development manager at Giant Steps. Duffy's main responsibilities include special event fundraisers (Charity Auction, 5K Walk for Autism and other smaller events), serving as a liaison to program staff, tracking donations and preparing acknowledgment letters.

With over eight years of experience, she is excited to work for an organization with such an impactful mission.

Giant Steps is committed to providing individuals with autism spectrum disorders and their families with superior educational and therapeutic services focused on improving the quality of daily life from early childhood through adulthood. For more information, visit www.mygiantsteps.org.



On July 1, Loaves & Fishes Community Services merged with Naperville CARES

to optimize the level of care offered to our community through the integration of resources and programs.

Loaves & Fishes' food-distribution model offers a market atmosphere in addition to home delivery and an extensive food recovery program. Loaves and Fishes CARES Programs include emergency financial assistance, a car donation program, public health benefits, VITA and health/nutrition initiatives. Loaves & Fishes is also a site for computer training, ESL classes and job counseling services offered by the People's Resource Center, College of DuPage and Community Career Center, respectively.

Their shared missions, strategies, values and cultures create a strong, unified vision and enhances service to the community. For more information, visit www.loaves-fishes.org.



Naper Settlement, the only nationally accredited outdoor history museum in Illinois, is making plans for an Agricultural Interpretive Center, which aims to preserve the region's agricultural history. The 5,000-square-foot building will showcase farmers' stories from the community and exhibit antique farming equipment.

The center will also contain interactive exhibits and programming that will work under the banner of STEM (Science, Technology, Engineering and Math) to educate the museum's visitors and students. The Agricultural Interpretive Center has a projected completion date of 2018. For more information, visit www.napersettlement.org/aic.



In December, Kim Perez joined The Cradle as president and CEO. Perez is responsible for the leadership and management of the organization and expansion of offerings to meet the growing needs of the families it serves.

Perez served as executive director of People's Resource Center, a nonprofit dedicated to supporting the basic necessities for over 32,000 people facing tough times in DuPage County. In her career, she has dedicated herself to serving children and families. Her experience in strategic execution and donor development as both an executive and board member of mission-driven organizations is an asset to The Cradle.

Founded in 1923, The Cradle is a nonprofit adoption and child welfare agency. In its 93-year history, The Cradle has placed more than 15,000 children with loving families. For more information, visit www.cradle.org.



Earlier this year, Lori Solyom stepped into the role of director of development of Voice of Care and has teamed up with Kris Blackwell, executive director, and a team of ministry facilitators to take Voice of Care's training curriculum national.

Solyom manages media and communications and builds awareness and support for Voice of Care's new duplicable training and resource model. As a consultant, Solyom was revamping Voice of Care's media image when the ministry underwent a drastic reorganization, moving from presenting programs for people with disabilities into training churches to develop their own special needs ministries and programming.

Voice of Care's mission is to equip the Church to nurture people with disabilities and their caregivers in their walk with Christ. For more information, visit www.voiceofcare.org.



In March, the DuPage Foundation hired Lisa Tylke to launch its Arts DuPage initiative. In her new role, Tylke is responsible for leading the newly-formed, county-wide arts council to promote creativity and nurture engagement and investment in the arts throughout DuPage County.

Tylke brought to the role key expertise in building new infrastructures and developing relationships with multiple constituencies. The initiative's first public offering is an online events calendar, www.artsdupage.org, designed to augment the promotional efforts of area arts organizations, making it easier for the public to find, embrace and engage in our community's arts and culture experiences.

Share your Member News:

Tell us about your job change, promotion, professional development, awards and honors. Please email your news and photo to Jill McWilliams, *Cultivate* editor, at jillm@elmhurst.edu. ●

Building Our Membership

Your membership in WSPN is important to us. As volunteers, we strive to make impactful education, networking and career enhancement opportunities available to you.

We ask our members and potential members to help in making this a valuable tool and resource to the suburban nonprofit community and to the profession. Please provide us with your feedback, encourage a colleague to join and preview our program calendar.

For only \$40 per year, WSPN is the best value around!

Thank you,

Courtney Simek, membership chair
csimek@seniorhomesharing.org



tinyurl.com/WSPNFacebook



twitter.com/WSPNOnline

Attention members:

We want to keep in touch!

Have you changed jobs or received a new title?

Do you have a new email or mailing address?

Simply log into your profile on www.wspnonline.org and update your contact information.

Request a new password if you've forgotten it.

Also, join WSPN on LinkedIn to extend your networking possibilities.

Be a part of the dialog.

Scholarships

The world of philanthropy is teeming with substantial information. Let WSPN help you access it!

If your philanthropic organization doesn't have sufficient funds to send you to the latest AFP conference, Forefront course or other philanthropy educational event, WSPN can offer financial assistance for these skill-building workshops and trainings.

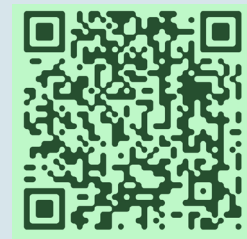
HOW TO APPLY:

Scholarships for training and continuing education opportunities are available to WSPN members. Scholarships can be applied to a variety of educational opportunities related to fundraising and nonprofit management.

If you are a member of WSPN and interested in applying for a scholarship, please complete an application form found at www.wspnonline.org.

Become a WSPN member:

Check out www.wspnonline.org to learn more about WSPN benefits including our monthly educational events, job opportunities and scholarship information.



Scan to join.

Join online or by downloading a membership application at www.wspnonline.org.
Non-transferable dues are \$40 per year.

over a 13-year span. Responses from this first mailing helped me identify a small number of prospective major donors to cultivate more personally.

2. Good Donor Data, Acknowledgments, and Moves Management – Are you able to record and acknowledge all your routine annual and tribute gifts promptly and with a touch of personalization?

If not, you need to work hard in this area so that all your donors feel properly appreciated. You need a system (preferably a fundraising database system) in which you can record and report on donor's gifts so you can identify your top 25 planned and major gifts prospects.

Then develop an individual cultivation plan or "moves management" plan for each of your top prospects. A proper management system allows you to keep contact notes on your own and your board member's "moves" with each prospect.

Example: I was sensitized when several peeved and anxious donors (at an undisclosed charity) telephoned to ask if their donation checks had been received. My inquiries revealed that acknowledgment letters were mailed sometimes two or even three weeks after the checks were received!

Team discussions and coordination over time enabled us to adopt a practice of closing batches within two to three days so that acknowledgment letters were mailed within one week at the latest. The result: no more complaints and more opportunities for positive donor discussions.

3. Leadership – Success requires solid leadership support. Every year, the board and executive director must consider major and planned giving a priority within fundraising.

Cultivation of major and planned gifts should be integrated in all of your charity's marketing and fundraising functions. The executive team and board members should each allocate time to major gifts.

Likewise, an adequate budget must be allocated to the functions, software, marketing materials and staff training needed to build your program.

Example: At times, leadership support is built out of board consensus at meetings. It also can be grown leader to leader.

A board member once pulled me aside to privately confess that he had felt inadequate for several years because he was unable to bring in more gifts. I offered to meet with him individually to figure out new approaches and to apply moves management skills.

After he shared his eventual successes with fellow board members, both informally and during board meetings, I had two other board members ask for this same type of individual coaching.

4. Basic Continuing Education – No charity should fail to start a major and planned giving program because they lack gift planning experts on their team.

Some gifts are simpler. For example, bequests through wills are the most common mode of planned giving and provide the most planned giving dollars, even to sophisticated charities like universities.

There are cost-effective ways to help your staff and volunteers build their knowledge and skills. For example, local planned giving councils and community foundations provide periodic meetings with both instructive programs and the opportunity to network with others who are also interested in expanding their gift planning programs.

It helps to have "backup." A fundraising consultant could be hired to help guide you through the steps of building your planned giving program.

You could also establish a volunteer relationship with financial or estate planning professionals who might be willing to offer some basic pro bono advice.

Example: I attend several Suburban Planned Giving Council meetings each year. During a guest speaker's presentation, I challenge myself to identify at least one actionable step I can implement to improve my program. That actionable step goes on my to-do list for the coming week.

In conclusion, adding or enhancing a planned giving program will be beneficial for the present and future health of your organization. Success will follow. As Stephen Covey says:

"Sharpen the Saw means preserving and enhancing the greatest asset you have—you."



David Terrill, president of Terrill Consulting, www.terrillconsulting.com, began his fundraising career in 1982 as a development officer. From 1995 on, he focused on planned giving.

Terrill started and built gift planning programs for Brookfield Zoo and Northwest Community Hospital Foundation. In 2013, he began his independent consultant firm using his breadth of experience to help nonprofits build capacity through creative philanthropy. For more information, email daveterrill@terrillconsulting.com. ●

of the special event then opens the door for a major or planned gift in the future. That may be shortening the process a bit, but I think you see the point.

Obviously, I strongly believe individual solicitations are vital to non-profits who want to fundraise effectively.

Certainly, it's important to hunt for grants from various sources, but they are subject to many variables (time limits, politics and board member eccentricities, for example) that aren't part of the individual donor equation, rendering them, for all intents and purposes, non-sustainable.

Fact: According to the American Association of Fundraising Counsel, 80-90% of private giving in the U.S., amounting to hundreds of billions of annual dollars, comes from individuals.

What I'm saying is that if your organization thinks it can thrive on grants, it can't ... it won't. Survive, maybe. Thrive, I don't think so!

That's what I mean by the title. You want donors who will be there for you through the good times and the bad—what I call "thick and thin." You get that from the relationships you build with individual donors over time.

If an individual gives your organization a contribution, and if you cultivate that person intelligently, respectfully and imaginatively, there is every reason to believe that more and larger gifts from that person will be forthcoming. Rarely does this potential exist with grants or, for that matter, from foundations. Has a foundation ever asked you where you plan to get your funding when the grant runs out?

If you haven't started a successful individual donor campaign, you're depriving your organization of some of the billions of dollars that will be given away this year.



Ron Rescigno is owner, VP New Business Development at Rescigno's Marketing Connections, www.rescignos.com, which specializes in strategic consulting for nonprofits, sales plans, business strategies and comprehensive database management. ●

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Save These Dates . . .

West Suburban Philanthropic Network Programs

Please save these dates . . . and join us for the exciting events we have planned.



WSPN programs are free to WSPN members and \$20 for non-members.

Programs are usually held on the third Thursday of each month.

Registration and refreshments begin at 8 a.m. and the program begins at 8:30 a.m., unless specified.

For more information or to register, visit www.wspnonline.org.

After Hours Holiday Party	
Thursday, Dec. 8	Time: 5:30 to 7:30 p.m. Location: Warren's Ale House, 51 Town Square, Wheaton, IL 60189

Thursday, Jan. 19	Topic: Planning Ahead: Charting your career path and looking at career development options at your organization Speakers: Theresa Nihill, chief operating officer of Metropolitan Family Services Laura Stokes-Gray, consultant/interim executive director through Executive Service Corps of Chicago Location: Metropolitan Family Services DuPage, 222 E. Willow, Wheaton, IL 60187
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Save these dates, too. More details to follow.

Feb. 16 - Optimizing your "Invisible" Staff – Consultants

March 16 - Board Development and Engagement

April 20 - Generational Giving

West Suburban Philanthropic Network 15th Annual Philanthropy Awards Luncheon

Tuesday, May 23 LOCATION: Embassy Suites, 1823 Abriter Court, Naperville, IL 60563
Networking begins at 11 a.m., luncheon follows. Reservations begin in February—\$50 per person or \$500 for a table of 10. Sponsorship opportunities are available from \$500 to \$5,000.

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