

**AFP Suncoast February Newsletter**

1 message

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Fri, Feb 24, 2017 at 5:10 PM

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**February Monthly E-Newsletter**



**IN THIS ISSUE**

**Message from the President**

[Message from the President](#)

[Welcome New Members](#)

[March Membership Meeting](#)

[Job Bank](#)

**Who Speaks for You?**

What were you doing on February 16th? I was busy with client work all day then spent the evening watching my daughter play a high school softball game. But even though I was here in Tampa, my voice was heard in Washington. You might think I accomplished that using my magic powers, but

Planet Philanthropy

Scholarships

Webinar

Prospect Research



really it was the power of my AFP membership at work.  
**Read MORE...**

## Welcome New Member

### 2017 Board of Directors

Sara Leonard, CFRE ~ *President*

JL Wagner, CFRE ~ *President Elect*

Judy Anderson ~ *Immediate Past President*

Angela Pottinger ~ *Secretary*

Rich Strehl ~ *Treasurer*

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Julie Bostick, CFRE  
Laura Rowe Grams  
Tammy Leventis  
Joanne Linkner  
Jennifer Moore, CFRE  
Julie Perrelli  
Kathy Rabon, CFRE  
Brenda Rouse  
Debbie Sokolov, CFRE  
Merrill Stewart  
Michelle Turman, CFRE  
Bryn Warner, CFRE

### AFP Suncoast Chapter Administrator

Chandra Tracy  
(727) 642-9000  
[afpsuncoastchapter@gmail.com](mailto:afpsuncoastchapter@gmail.com)

### Join AFP Today!

The Association of Fundraising Professionals (AFP) represents more than 30,000 members around the world

- Amber Carpenter - St. Joseph's Hospitals Foundation
- Duggan Cooley - Pinellas Community Foundation
- Meagan Heller
- Virginia McGrath - Hillsborough Education Foundation
- Janet Smith - Frankie's Friends
- Stephanie Vranich - Volunteers of America of Florida

## The Holistic Relationship begins with YOU

### Presented by Janet Ginn, CFRE

The Holistic Relationship begins with YOU presentation provides a comprehensive overview and helps answer the questions "am I in the right place and profession?" and "how can I gain the knowledge and respect needed to succeed?"

No matter how long you have been in the nonprofit arena there are times we question whether or not we are in the right place doing the right things. Attendees are provided with thought provoking questions which will lead them to real solutions in regard to their career, donor relations and organizational enthusiasm.

Relationship building, the solicitation process, the psychological dynamics and the realities of asking for money are examined as attendees hear stories of real life examples. While attendees develop an understanding of the essentials of fundraising operations, they also examine the larger issues confronting today's fundraising professionals.

The presentation will address knowing who YOU are; knowing your organization, knowing your donors and building the appropriate relationship; knowing their capacity; knowing their needs – put them first through the

working to advance philanthropy.  
Join today - benefit today!

Click [HERE](#) for more info.

## Job Bank

Whether you are seeking a job or have one to offer, the AFP Suncoast Job Bank is a perfect place to find opportunities. Currently we have postings for the following:

### [Gallery Shop Manager](#)

January 31, 2017  
Dunedin Fine Art Center (DFAC),  
Dunedin, FL.

### [Event and Marketing Coordinator](#)

January 31, 2017  
The Arc Tampa Bay Foundation,  
Clearwater, FL

### [Development Director](#)

January 31, 2017  
Arthritis Foundation | Tampa, FL

### [Annual Fund Manager](#)

January 31, 2017  
SPCA Tampa Bay, Largo, FL

### [Director of Philanthropy](#)

January 31, 2017  
Suncoast Hospice Foundation,  
Clearwater FL

### [Director of Development](#)

February 07, 2017  
Louisiana Universities Marine  
Consortium, Chauvin, Louisiana

### [Development Coordinator](#)

February 07, 2017  
Heart Gallery - St Petersburg, FL

### [Chief Executive Officer](#)

February 07, 2017  
Girl Scouts of Gulfcoast Florida, Inc.  
- Sarasota, FL

### [Foundation Executive Director](#)

February 07, 2017  
Gracepoint - Tampa, Florida

discernment model; knowing how to communicate and going beyond your comfort zone to help them discern their needs and desires. You will walk away with tips for personal and professional development as well as organizational change.

**Tuesday - March 21, 2017**

**11:30 AM - 1:00 PM**

**Doors open at 11:30 AM**

**11:45 LUNCHEON BEGINS**

**11:00 Membership Orientation**

**LUNCHEON PARTNERSHIP AVAILABLE.**

**Applied for 1 hour CFRE Credit**



**MEETING FEE**

**\$25.00 for Members**

**\$40.00 for Guests**

**Payments may be paid in advance or at the door.**

**RSVP DEADLINE - NOON ON FRIDAY, MARCH 17TH.**

**PLEASE NOTE THAT THIS IS A FIRM RESERVATION DEADLINE. Due to a large number of late reservations, walk-ups and venue restrictions - LATE RESERVATIONS AND WALK-UPS WILL NOT BE ACCOMMODATED. No shows will be billed.**

Assistant Director of Development,  
Annual Giving  
February 07, 2017  
University of South Florida Tampa,  
FL

CLICK HERE TO MAKE YOUR RESERVATION!

Development Officer  
February 08, 2017  
Stetson College of Law, Gulfport, FL

Investor Relations Manager  
February 18, 2017  
Prospera - Orlando, FL

Director of Development  
February 18, 2017  
Children's Dream Fund, St.  
Petersburg, FL

Special Events and Food Drive  
Coordinator  
February 18, 2017  
Feeding Tampa Bay/Tampa, FL

Development Coordinator  
February 19, 2017  
Museum of Science and Industry  
(MOSI), Tampa, FL

Chapter members may post job  
listings at no cost; non-members may  
post listings for \$50/month. Visit the  
[Job Bank](#) for more details.

THANK YOU TO OUR FEBRUARY SPONSOR



PROSPECT  
RESEARCH  
*institute*

Are you a fundraising manager looking to build and grow prospect research in your fundraising operations?

Register for three free videos and worksheets to learn how.

**CLICK HERE FOR MORE INFORMATION -**  
<http://www.prospectresearchinstitute.org/afpsuncoast/>



## PLANET PHILANTHROPY

Planet Philanthropy 2017 is almost here! June 25-27 in Tampa at the downtown Hilton. Don't miss this great chance to come and learn with your counterparts from across the state in a fun atmosphere that is sure to bring great learning and fun! We will have fun, fundraising training and friends. Come and meet new people, re-connect with old friends and learn a ton in a

fun setting. Tampa has not hosted in a long time so let's how the state why we love it here!!!!

Mark your calendar now!!!!

Visit <http://www.planetphilanthropy.org/hotel>- Reservations are open!

## SCHOLARSHIPS

Possibly the best way to improve your knowledge and skills is through professional development. But professional development can be expensive. Many organizations find it difficult to send their employees to conferences for renewal and inspiration. As a member benefit, your AFP chapter has established a scholarship program to help make these important enrichment opportunities accessible to you. To view the various opportunities and qualifications for an AFP Scholarship, visit <http://afpsuncoast.org/Scholarship>.

## FREE WEBINAR FOR AFP MEMBERS

### **Free Webinar for AFP Members Only: Accepting Gifts from Pablo Escobar and Other Ethical Dilemmas**

**Monday, February 27, 2017  
1:00 - 2:00 PM (Eastern)**

Would you accept a gift from Pablo Escobar? This free webinar, for AFP members only, will explore the roles and responsibilities of the fundraiser and board in dealing with unethical situations and will help attendees understand and identify the seven ethical dilemmas.

This webinar is made possible with the generous support of the Claudia A. Looney, CFRE, Fund for Ethics in Fundraising and the AFP Foundation.

At the conclusion of this session, you will:

- Know how fundraisers can approach and deal with unethical situations in their own organizations
- Understand the Seven Ethical Dilemmas in the context of the standards in the AFP Code of Ethics
- Be prepared for scenarios that raise ethical issues in everyday fundraising
- Gain 1 hour of CFRE education credit
- Recommended for Ethics credit for ACFRE

**[CLICK HERE TO REGISTER!](#)**

# PROSPECT RESEARCH: 3 MYTHS AND 3 SUCCESS SECRETS by Jen Filla, CEO at the Prospect Research Institute

Prospect research has undergone a huge transformation in the past five years and the demand for skilled prospect research professionals has soared. It's no surprise then that a few myths have cropped up or that successful research feels elusive to many even when able to hire staff for that purpose. This article aims to shine some light into the darkness.

## **Myth #1: Prospect research is software**

The software tools available to perform research on individuals, corporations, and foundations have improved dramatically. This is good news! Wealth screenings have become more accurate at matching assets and indicators to individuals and capacity ratings have gotten sharper at segmenting our donor lists.

Even though the tools are great, it still requires a professional to understand the information sources and how those apply to fundraising. For example, a professional will help you figure out how best to use a vendor-generated capacity rating to segment your list, adding other internal data points to narrow the list and assign prospects appropriately to fundraisers.

## **Myth #2: Prospect research is profile generation**

Yes, prospect research professionals still create manually researched donor profiles to aid in major gift identification, cultivation, and solicitation. Many times now the identification profile is mostly generated by a strong software tool and manual research is reserved for larger gifts and closer to solicitation.

But prospect research has broadened into additional specialties, too. Prospect management is a specialized skill set that requires a deep trifecta of knowledge: major gifts fundraising, database, and people skills. Fundraising Analytics requires a "numbers" mindset to problem solving with the ability to communicate or translate the data into insights and recommendations.

## **Myth #3: Prospect research doesn't help with direct appeals or events**

As you might have guessed from Myth #2, prospect research can now stretch into every aspect of fundraising. Fundraising analytics can select the best lists for mailing and invitations as well as evaluate the performance of appeals and events. Analytics also evaluate and describe your donors in ways that can help leadership

make decisions. Many large organizations are applying the same successful prospect management approach to annual appeals.

**Success Secret #1: Prospect research staff use a combination of techniques to routinely identify and prioritize BEST prospects**

Whether your fundraising operations are small or large, whether you have dedicated prospect research staff or rely upon your database administrator, prospect research training now emphasizes prospect identification in all its shapes and stages. It might be reactively researching individuals to determine how well they align with linkage, ability, and interest. Or it might be proactively determining key indicators from among all of your donors.

**Success Secret #2: Prospect research staff are trained to transform data into fundraising actions.**

This emphasis on identification stems from a trained researcher's ability to gather data, analyze it, and then translate it into fundraising actions. It's not enough anymore to say someone is wealthy. A trained professional can explain how that wealth might turn into a gift and suggest areas for the fundraiser to explore in visits. It's not enough to deliver a list of prospects for an event or mailing. A trained professional suggests segmented approaches and provides the information a fundraiser needs to take the next step.

**Success Secret #3: Prospect research staff combine research and fundraising knowledge to create processes and procedures to keep prospects moving through the fundraising gift cycle**

Prospect management is the often overlooked "middle child" of prospect research! The combination of fundraising knowledge, people skills, and data skills is an unusual one. It creates a unique opportunity for efficiencies and impact in your major gifts initiatives. When a prospect manager is trained and fully embraced as part of the major gifts team, the results are usually amazing.

**Build your capacity – with training!**

Now that the demand for prospect research professionals is soaring, many new hires come from outside of fundraising and outside of prospect research. This has caused a training dilemma. Frontline fundraisers and management usually don't have the skills or experience in research to train them.

There are affordable training solutions to support and build your prospect research capacity. The [Prospect Research Institute](#) offers

an array of training and the [Association of Professional Researchers for Advancement](#) (Apra) provides highly regarded conferences and networking opportunities.

***About the Prospect Research Institute***

The Prospect Research Institute is a vibrant, online learning community that offers online courses, a membership community, publications, and other educational content that prepares prospect research professionals for their work in prospect research, fundraising analytics and relationship management.



PROSPECT  
RESEARCH  
*institute*

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