

DEN Update

The monthly publication of the Development Executives Network



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Board of Directors

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mlange@montereyartsymphony.org

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alexandra.g.matei@us.hsbc.com

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kitfranke@gmail.com

Program Committee: Cathy Lindstrom
Fdn for MtryCnty Free Libraries
director@fmcfl.org

Newsletter: Anna Dudney
Monterey Institute of International Studies
adudney@miis.edu

Registration: Lauren Cohen
MY Museum
lauren@mymuseum.org

Members Only Workshop: Stacy Dubuc
SPCA
sdubuc@spcamc.org

Philanthropy Day Co-Chair: Shari Haste
Community Partnership for Youth
respect@cpy.org

At Large: Sue Dewar
sumacdewar@aol.com

Save the Date

What is Leadership Presence?

June 17th, 2011 | 12 noon at Tarpys Roadhouse

Join Denise Kaku, a trained leadership coach, and experience the power of leadership presence and discover how to be more focused and present. Tap into your innate intelligence and leave with tips for moving with more ease and grace.

Look for the Evite invitation later this June for more information and to RSVP. Learn more about Denise Kaku at www.kakuconsulting.com



Denise Kaku is a business coach, trainer, and facilitator who brings more than 25 years of experience in the business world through her organization development consulting expertise and unwavering enthusiasm for guiding her clients to live and work with authentic passion, purpose and success. She employs proven techniques based on three core principles of leadership that when applied, empower business people to turn obstacles into opportunities, shift overwhelm into effectiveness and have a positive impact on bottom-line results. Using a combination of teaching to educate on key concepts in an interactive learning environment, and coaching to provide objectivity and individualized support, Denise provides a comprehensive and effective leadership package for business people who are invested in their growth and success. Denise is also a certified Somatic Coach, former CPA and integrates this background into her coaching process to help her clients show up authentically to create more abundance in their businesses and personal lives.

Denise serves on several boards and volunteers her time mentoring high school girls with Girls Inc. She practices Aikido and incorporates physical practices in centering with her clients.



Mission

The mission of the Development Executives Network is to provide useful, high quality programs and training, build a sense of community among local nonprofits and provide members and guests with the opportunity to network with each other.

Contact

Have an item you would like to include in a future DEN newsletter? Please email employment opportunities, professional development, photos, etc. to Anna Dudney at adudney@miis.edu by the end of the month.

Do you know of anyone who might be interested in joining DEN? Please pass along this newsletter, which includes a DEN Membership Form.

For more information, please contact Alexandra Matei, VP Membership, at alexandra.g.matei@us.hsbc.com.

Employment Opportunities

Community Human Services

Development Director (full-time)

Responsibilities include fundraising and marketing, including annual campaign, grant writing, direct mail, special events, newsletters, brochures, press releases, public service announcements and donor relations.

Experience with capital campaigns and major gifts a plus. Excellent communication skills and PC literacy required. Must possess a BA in Business, Marketing, Communications, Journalism or related field and two years experience, or five years equivalent experience. Must have some web development skills. Bilingual/Bicultural (E/S) welcome. Salary \$3,728 - \$4,110 per month, DOE, plus excellent benefits.

Send resume & cover letter indicating position to Florence Shivers-Gilliam at fax: 658-3815, mail: P.O. Box 3076 Monterey, CA 93942, or e-mail: fsgilliam@chservices.org. Position open until filled.

United Way Monterey County

Development Associate

Reports to: Director of Development

Assigned Department: Resource Development

Full Time, Permanent, Non-Exempt Position

Summary

The Development Associate is responsible for establishing contacts and building positive relationships with a variety of companies in Monterey County for the purpose of raising charitable funds. The Associate is responsible for maintaining accurate data related to those campaigns. The Associate must possess a detailed understanding of United Way Monterey County (UWMC), its certified partner agencies and our role in the community and possess the communication skills to impart this information to the public through the workplace campaigns. Associate is also expected to participate in special events/projects and take leadership role(s) as assigned.

Key Responsibility Area: Campaign Planning and Organization

- Assist in the preparation and development of annual campaign plan and calendar.
- Review and analyze the strengths and weaknesses of past campaign, changes in economic factors, etc., which may affect county-wide campaign.
- Prepare written recommendations on strategies for campaign, identifies potential for improvement and implement action plans.
- Participate in the development and preparation of campaign materials. Work with the Director of Marketing and Communications in preparation for campaign marketing and creating strategies for year round communication with donors and volunteers.

Key Responsibility Area: Campaign Implementation and Reporting

- Arrange and conduct campaign presentations to full spectrum of employees.
- Assist company with special fundraising events and innovative ideas to encourage giving within the work place.
- Work with other UWMC staff to encourage leader donors and philanthropy at all levels and throughout the company, honoring all levels of giving.
- Follow up with on-site volunteers for a timely processing of pledge forms.
- Ensure timely completion of campaign reports and documentation as needed for analysis and strategic planning.

Competencies:

- Relationship Management: The ability to build, leverage, and maintain mutually positive relationships that provide support for and add value to United Way, its programs, and the community.
- Consultative Selling: Ability to cooperate/collaborate with customers and stakeholders to clearly define their objectives to identify solutions that solve their needs and lead to increased revenue.

- **Problem Solving and Decision Making:** Identifying, analyzing, organizing, and solving problems and issues in a timely, effective manner; uses data and input from others to make sound, timely decisions even in the face of uncertainty.
- **Strategy and Product Innovation:** Ability to identify innovative strategies to address community concerns, coordinate with Community Benefit to create products to address strategies, and find appropriate funding mechanisms.
- **Communication:** Presents ideas in a style that is clear, fluent, and to the point; keeps the attention of others; clearly articulates the key points of an issue; takes recipients' perspectives into consideration.
- **Results Orientation:** The capacity to be energized and excited by challenging objectives and a concern for exceeding goals set by self or others; achieve high level, sustainable performance.
- **Integrity:** Consistently honoring commitments and taking responsibility for actions and words.
- **Flexibility:** Demonstrates adaptability and openness to alternative solutions and flexibility when interacting with others, understanding their attitudes, needs, interests, and perspectives.
- **Inclusiveness:** The ability to network and partner with all stakeholders including broad and diverse representation of private/public and traditional/non-traditional community organizations.

Desired Qualifications:

- BA degree or equivalent with emphasis in Communications, Marketing, Business Administration preferred.
- Professional experience in resource development and fundraising.
- Professional experience in sales, sales management and customer service.

Position Requires:

- Comfortable with public speaking
- Bilingual/Biliterate Spanish-English
- People-oriented and able to build strong relationships
- Persuasive and articulate
- Well-organized, focused with attention to details
- Strong written and verbal communication skills
- Time Management and able to perform multiple tasks
- Self motivated, able to work independently, but as an integral part of a team
- Commitment to maintaining information confidentiality
- Ability to use Microsoft Office with advanced knowledge of Microsoft Excel and willingness to learn fundraising database software
- Flexible hours
- Valid CA driver's license and access to car

Benefits: Benefits include healthcare, dental, vision, retirement plan, disability, life and generous paid time off and holiday policies.

How to Apply: Interested applicants are encouraged to submit a cover letter and resume by email, kmitchell@unitedwaymcca.org

Monterey Symphony, Monterey, California

Marketing Assistant

Reports to: Director of Development

Salary: Commensurate with Experience

Type: Part-Time – Experienced, Non-Exempt

Start Date: July 2011

Essential Duties/Responsibilities:

- Responsible for the maintenance and updates of the Monterey Symphony website.
- Responsible for semi-monthly e-blasts and monthly e-newsletter.
- Responsible for all advertising placements to appropriate outlets
- Assists with advertising layout and design and the creation and production of all marketing promotional materials
- Responsible for submission of all promotional information to area publicity calendars.
- Responsible for the timely writing and submission of all press releases and PSA's
- Responsible for monthly content in the season subscription program book
- Assists with obtaining advertisement for season subscription program book
- Responsible for invoicing of program book advertisement
- Responsible for coordinating volunteers to distribute marketing promotional materials
- Assists with other marketing duties as assigned

Qualifications, Skills and Knowledge Required:

- Outstanding capacities for communication, personal presentation, organization, self-motivation, accuracy, follow-through, timeliness, consistency, great attention to detail, and the ability to handle a multitude of tasks under deadline pressure.
- Excellent written and personal communication skills are essential.
- Knowledge of graphic design software preferred.
- Advanced computer skills: Word, Excel, Outlook, and PowerPoint.
- Ability to work well independently with minimal supervision and as part of a team.
- Willingness to occasionally work outside of office hours on weekends and evenings.
- Must interact effectively with all levels of staff, volunteers, donors, and prospects.
- Other skills and abilities pertinent to the position include flexibility, reliability, and tact.
- Marketing and graphic design experience preferred.
- Interest in the arts preferred.

Benefits:

Salary commensurate with experience.

Application Procedure:

Please send the following items:

A brief cover letter explaining why your application should be considered for this position, your availability, and your salary expectations.

A detailed resume indicating your contact information, job titles held, employment dates, a brief description of responsibilities and highest level of education.

Please, no phone calls.

Send completed application to:

Michelle Lange

Monterey Symphony

2560 Garden Road, Suite 101

Monterey, CA 93940

employment@montereyorchestra.org

Monterey Symphony, Monterey, California

Development Associate

Reports to: Director of Development

Salary: Commensurate with Experience

Type: Full-Time – Experienced, Exempt

Start Date: July 2011

Essential Duties/Responsibilities:

- Responsible for all components of scheduled Annual Fund solicitations to include writing of appeals.
- Responsible for preparation and on-time submission of grants and associated reports.
- Assists in the coordination of donor and prospect cultivation events.
- Provides support for Monterey Symphony special events (includes working with event and administrative volunteers).
- Assists with the management and maintenance of the donor database including the entry of donor and prospect information and report preparation.
- Conducts prospect and donor research as requested.
- Responsible for preparation of information packets for committee meetings and taking minutes at meetings.
- Provides general administrative support.

Qualifications, Skills and Knowledge Required:

- Outstanding capacities for communication, personal presentation, organization, self-motivation, accuracy, follow-through, timeliness, consistency, great attention to detail, and the ability to handle a multitude of tasks under deadline pressure.
- Excellent written and personal communication skills are essential.
- Advanced computer skills: Word, Excel, Outlook, and PowerPoint.
- Knowledge of integrated database software and reporting package required; proficiency in Raiser's Edge strongly preferred.
- Ability to work well independently with minimal supervision and as part of a team.
- Experience with event logistics, planning, and management.
- Willingness to work outside of office hours on weekends and evenings.
- Must interact effectively with all levels of staff, volunteers, donors, and prospects.
- Other skills and abilities pertinent to the position include flexibility, reliability, and tact.

- Development experience preferred.
- Interest in the arts preferred.

Benefits:

Salary commensurate with experience, health insurance, and paid vacation.

Application Procedure:

Please send the following items:

A brief cover letter explaining why your application should be considered for this position, your availability, and your salary expectations.

A detailed resume indicating your contact information, job titles held, employment dates, a brief description of responsibilities and highest level of education.

Please, no phone calls.

Send completed application to:

Michelle Lange

Monterey Symphony

2560 Garden Road, Suite 101

Monterey, CA 93940

employment@monterey_symphony.org

Join or Renew Your DEN Membership Today!

The mission of the Development Executives Network is to provide useful, high-quality programs and training; build a sense of community among local nonprofits; and provide members and guests with the opportunity to network with each other.

2011 DEN Membership Benefits

- ✓ **Monthly networking** lunch program with stimulating speakers.
- ✓ One **FREE** admission to the annual **DEN Members Only Workshop**.
- ✓ **Monthly Newsletter** listing program information, job opportunities and useful resources.
- ✓ **Annual Membership Directory** including contact information for local organizations.
- ✓ One free ticket to the festive **Holiday Luncheon** in December and a chance to win great door prizes.
- ✓ **"Welcome Wagon"**-When a new person joins the development staff in a member agency, he/she is invited to attend one free lunch meeting to learn about DEN.
- ✓ **Membership dues** are for the calendar year and are not pro-rated.

Please return this form along with **\$60.00** to:

DEN • 484 Washington Street, #199 • Monterey, CA 93940

New Membership

Renewal

Please PRINT:

Agency Name _____

Contact Person & Title _____

Address _____

City _____ Zip _____

Phone _____ Fax _____

Email _____

Website _____

Membership benefits are extended to all staff, volunteers and board members of a participating organization **EXCEPT** for the **Members Only Workshop** and **Holiday Luncheon** which is limited to one person per organization unless an additional fee is paid. **Student membership may be used only for 2 years.**

www.DevelopmentExecutivesNetwork.org

Members Only Training

Thank you to those who joined us for this year's DEN Members Only Training! Please find the slides from Stan Yogi's presentation about Planned Giving on the following pages.

Key Points

- Relationships
- Patience
- Persistence
- No need to be an expert
- Organizational mission

Can You Afford Not to Have a Planned Giving Program?

- Intergenerational transfer of wealth
- 8% leave an estate gift
- Offsets shortfalls
- Builds reserves



Turning Taboos on Their Heads



- Reflects values and priorities
- Helps family and friends

Before You Start, Consider:

- Base of donors
- Case for support
- Organizational leaders' support



Foundation for Planned Giving Program

- Policies
- Bequest language
- Leaders make gifts
- Legacy society
- Advisors



Types of Estate Gifts

- Bequests: Wills and Trusts
- Beneficiary designations
- Personal property
- Life income gifts



Focus on Bequests & Beneficiary Designations

- 80% of planned gifts are bequests
- Easy for donors to understand and execute
- Don't require expertise
- Easy to receive gifts



Spreading the Word

- Existing communications
- Simple flyer or brochure
- Direct mail
- Face to face meetings



“I Can’t Talk About That!”

- “You’re obviously committed to our work. . . .”
- “We’re asking all of our longtime supporters. . . .”
- “I’m curious. Where do we fall in your priorities?”

“I Can’t Talk About That!”

- “I’ve remembered (name) in my estate. . . .”
- “Your annual gifts make a big difference now. Have you thought about making a difference in the future?”

If a Donor Says. . .

- “I’ll think about it.”
- “I need to take care of my family.”
- “Will you help me find a lawyer?”

When a Donor Makes a Gift

- Special thank you
- Call or visit
- Invitations to events
- Cultivate regularly



When a Gift “Matures”

- Attorney, executor, trustee
- Condolence letter
- Remove from mailing list
- Ticklers
- Check for restrictions
- Newsletter article



Legacy Challenge Terms

- Cash grant for each new bequest intention
- 10% of bequest value or \$10,000
- No limit to number of grants
- Simple form for donor to complete

Legacy Challenge Results

- Hundreds of people participated
- Informed organization of \$127 million in deferred gifts
- Generated \$6 million in matching grants
- Motivated donors to make larger bequests
- Uncovered donors with hidden resources