



2024 | AFP Utah Chapter's

Annual Report

Prepared By :
2025 Communication Committee

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About Us

An official chapter of Association of Fundraising Professionals (AFP) Global, the AFP Utah Chapter serves professional fundraisers statewide. AFP Utah Chapter is run by a volunteer working board of directors and one part-time chapter administrator.

Our goal is to provide top-notch training, so Utah fundraisers can be a force for good.



Mission

The Association of Fundraising Professionals empowers individuals and organizations to practice ethical fundraising through professional education, networking, research and advocacy.



Purpose

1

To promote high standards of service and conduct among fundraisers in the state of Utah.

2

To provide opportunities for professional development for fundraisers at all career stages.

3

To promote a Code of Professional Ethics and Standards and build trust among donors.

4

To preserve and enhance a culture of philanthropy and volunteerism in the state of Utah.

5

To keep our members on top of the latest fundraising news and serve as a unified voice for Utah's fundraising community.

A Message From Our President

We are deeply grateful for each of you. As Utah's nonprofit community — volunteers, fundraisers, donors, and advocates — you continue to rise to meet the evolving needs of those you serve, and your impact is felt across our entire state.

Thank you to our members for being at the heart of AFP Utah. Our chapter is committed to providing value to you through networking, education, in-person and online resources, and so much more. Whether you're new to the field or a seasoned professional, we're here to support your journey and amplify your impact.

Thank you to our board members for your tireless leadership and commitment. In 2024, we brought fundraisers together through dynamic conferences, timely workshops, and invaluable learning opportunities. Your dedication helps ensure our chapter remains a hub for professional growth and support.

Thank you to our generous donors for investing in Utah's fundraising profession. Your support empowers us to offer these meaningful resources to fundraisers representing organizations of all sizes and missions. We are deeply grateful for your belief in our work and your partnership in our success.

We're honored you have made the Association of Fundraising Professionals Utah Chapter your professional community. Thank you for all you do to strengthen our communities and advance the causes that matter most.

Sincerely,



2024 Board of Directors

Ryan Baldwin, President
Intermountain Healthcare

Alexis Brown, President Elect
Park City Community
Foundation

Safia Keller, Secretary
University of Utah- College of
Education

Andrew Barnes, Treasurer
PC Tots

Judy Fang, Past President/Nominations
David Eccles School of Business

Rachel Robertson, Communications Chair
University of Utah

Laura Chynoweth, Advocacy Chair
Granted Fundraising Consultants

Chelsie Armstrong, Underwriting
University of Utah

Becky Youksetter, Underwriting
Guadalupe School

Aubri Tuero, IDEA Chair
Israel Tennis & Education Centers

Thomas Whitworth, Programming Co-Chair
United Way of Salt Lake

Jamie Riccobono, Programming Co-Chair
Utah Youth Village

Monica Owens, Scholarships Chair
Columbus Community Center

Sandra More, Scholarships Chair
CONNECT Summit County

Peggy Green, Conference Co-Chair
Utah Office of Homeless Service

Lavine Shapiro, Conference Co-Chair
Utah Food Bank

Dr. Daniel Heist, Collegiate Chair
Brigham Young University

Liza Springmeyer, Member-At-Large
Pathway Associates

Lynn Wong, Member-At-Large
University of Utah

Megan Kawaguchi, Membership Co-Chair
David Eccles School of Business

2024 STAFF

Gayle Ewer, Chapter Administrator

Program Impact

Connect & Caffeinate: AFP Utah Networking Event

Speaker: Jeff Lewis (Wealth Management Advisor at Northwestern Mutual)

Date: February 29, 2024

Registrants: 22

March Roundtable: Lunch with Fundraising Experts

Speakers: Alison McFarlane (Vice President Advancement, Emerita, Salt Lake Community College), Cameron Cole (MBA, CFP Wealth Advisor, Bernstein Private Wealth Management), Vickie Moshcetti (Chief Philanthropy Officer, Ronald McDonald House of Charities of the Intermountain Area)

Date: March 14, 2024

Registrants: 37

Connect & Caffeinate: AFP Utah Member Meetup

Date: May 9, 2024

Registrants: 26

Creating and Sustaining a Legacy Program

Speakers: Mat Claflin (CFP®, Senior Manager, Planned Giving, Best Friends Animal Society®), Lavine Shapiro (Funds Director, Utah Food Bank)

Date: June 13, 2024

Registrants: 19

Ethical Storytelling in Fundraising

Speakers: Gabe Moreno, Adam White

Date: September 5, 2024

Registrants: 22

Annual Membership Meeting: Insights from Donors- Cultivating Meaningful Connections

Speakers: Chelsey Curtis, Amanda Millerberg

Date: November 12, 2024

Registrants: 34

Annual Giving: Learning From the Experts

Speakers: Makensie Pratt (Former Director of Philanthropy at Shriners Children's Hospitals), Rachel Robertson (Senior Director of Annual Giving at the University of Utah)

Date: December 12, 2024

Registrants: 17

Program Impact Cont.

6
170+
Participants

Learning Programs

11
Presenters



Fundamentals of Fundraising Impact

Conference Event

The AFP Utah Chapter's Fundamentals of Fundraising conference is a full day education course providing a comprehensive overview of fundraising principles at the fundamental level. The course content covers the roles, responsibilities and best practices of fundraisers, with emphasis on what you are likely to encounter at the beginning of your career, including networking with fellow Utah fundraisers.

Learning objectives include donor retention, wealth transfer, stewarding donor families from generation to generation and more.

THE FUNDAMENTALS OF
FUNDRAISING CONFERENCE

Through the Looking Glass:
BUILDING MOMENTUM IN
FUNDRAISING

JUNE 20, 2024 | 8:00 AM - 4:00 PM
MEGAPLEX THEATERS JORDAN COMMONS
www.afputah.org/conferences/fun



Fundamentals of Fundraising Impact **Cont.**

Conference Event

Sessions & Speakers

19 Non-Members Attended Conference

Keynote

T. Clay Buck, Founder & Principal of TCB Fundraising, Lead Fundraising Coach

A Social Work Perspective in Fundraising Fundamentals

Shandy Clark

Insights from the Donor Perspective: New Generations

Cameron Cole & Allison J. Foster

Unlocking Generosity: Using Research-Based Best Practices

Dan Heist & Rachel Sumsion

How TEDx Speakers Prepare a Talk- and You Can Too

Beth Wolfer & Michelle Flynn

Fundraising Funniest Moments: An Open (and funny!) conversation

Clay Buck & Dhiraj Chand



Memberships & Scholarships

Each year, AFP Utah Chapter awards scholarships for various needs, such as membership dues or scholarship attendance.

In 2024 the Scholarship Committee awarded the following:



160
Chapter Members

3
Membership
scholarships provided
for demonstrated
financial need

11
Scholarships for
attendance to
Fundamentals of
Fundraising
Conference

\$3,475
Awarded in Financial
Aid

\$1,800
Awarded in
Scholarships for
Fundamentals of
Fundraising Day

\$1,000
Spent on travel to
ICON

Scholarship Impact

"I've gathered some valuable ideas, tips, and tricks that will help me improve my fundraising skills starting with DAF's! The Ability Inclusion Services enriches the lives of people with disabilities by actively providing community opportunities for independence for individual growth and with your help we will continue to better the lives of people with disabilities."

- Karina McLellan, AFP Conference Scholarship Recipient

"As someone who has only been a professional fundraiser for a year, the insights I gained were priceless. Clay Buck's emphasis on extending invitations and offers rather than making asks, and Cameron Cole & Allison Foster's session on accessing, interacting, and fundraising from DAFs, have fundamentally changed how I approach my work. I walked away with a renewed sense of confidence and energy, ready to excel in my role."

- Brooke Jorgensen, AFP Conference Scholarship Recipient

"I wanted to extend my heartfelt thanks for sponsoring the AFP Fundamentals conference and providing the scholarship that allowed me to attend. This was my first AFP Fundamentals conference, and I was absolutely blown away by the entire experience. The day was filled with inspiring speakers, invaluable content, and perfect intervals of presentations and breaks. The AFP committee members were lovely, and the participants made networking a warm, welcoming, and supportive experience."

"I am new to the fundraising world and this conference gave me a lot of valuable information that I am excited to put into practice for our growing foundation. I was particularly interested in the information on DAFs, which I was completely unaware of. I found the information on the different generations of donors and the different ways in which they act very interesting. It gave me a lot of ideas of how to reach a younger generation of donors than those who we usually work with."

- Jason Merrill, Conference Scholarship Recipient

"On behalf of the staff and board of directors of the Ability Inclusion Services, thank you for your scholarship donation! I was excited to receive this and would not have been able to attend the conference without it! I thoroughly enjoyed the conference and found all the speakers engaging. My favorites were the keynote speaker, the Donor Perspective session, and the Unlocking Generosity talk."



Utah Philanthropy Day

Utah's Flagship Celebration of Philanthropy & Volunteerism

Each November since 1999, the Association of Fundraising Professionals Utah Chapter (formerly Utah Society of Fund Raisers), Utah Nonprofits Association, and UServeUtah have celebrated Utah's outstanding philanthropists and volunteer leaders at the annual Philanthropy Day Luncheon.

Eight prestigious awards along with the Heart & Hands Award honor the various components of the critical nexus between visionary, supportive philanthropy and thriving, creative nonprofit organizations that respond to community concerns and the need for change.

The 2024 Utah Philanthropy Day celebration was held at the Grand America on November 7, 2024. **Utah Philanthropy Day is critical revenue** to support AFP Utah's programming and educational support for fundraising professionals across the state.

Thank You to Our 2024 Sponsors!

Lead Sponsors

THE ANDRUS FAMILY
FOUNDATION

GEORGE S. AND DOLORES DORÉ ECCLES
FOUNDATION



LARRY H. & GAIL
MILLER
FAMILY FOUNDATION

Supporting Sponsors



Labor
&
Honor
FOUNDATION

Mark and Kathie Miller
Foundation



IMAGINE **U** THE UNIVERSITY OF UTAH



Utah Philanthropy Day

2024 Honorees and Awards

Governor's Career Humanitarian Leadership Award

Gachi Guet, nominated by Utah Refugee Services Office

Lt. Governor's Public Service Award

Erin Castro, nominated by Brigham Young University

Outstanding Volunteer Award

Peggy Montrone, nominated by Volunteers of America, Utah

Outstanding Young Volunteer Award

Cynthia Ponce-Orellana, nominated by Comunidades Unidas

Corporate Spirit of Giving Award

Clyde Companies, nominated by Springville Museum of Art, Women's Leadership Institute, Saprea, and Utah Department of Transportation

Foundation Spirit of Giving Award

Huntsman Family Foundation, nominated by University of Utah

Philanthropic Leadership Award

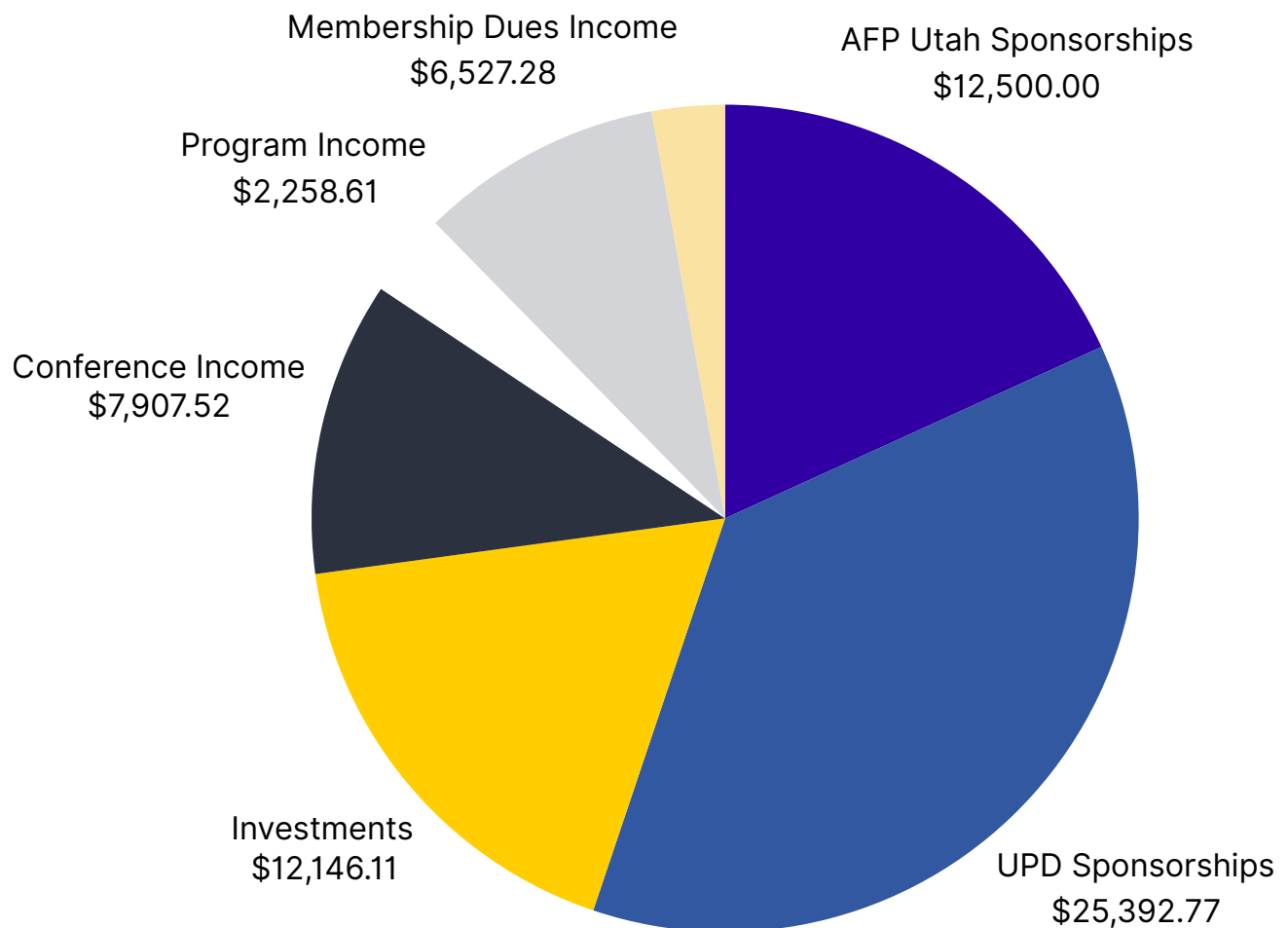
Pat and Florence King, nominated by CHOICE Humanitarian

Labor and Honor Award

Dell Loy Hansen Family Foundation

2024 Financials

As a 501c)(3) organization, AFP Utah Chapter's revenue sources include direct public support, membership dues, Utah Philanthropy Day sponsorships, and registration fees from programs and conference.



\$68,689.63

2024 Gross Revenue

55.3%

of revenue are from
sponsorships

\$37,892.77

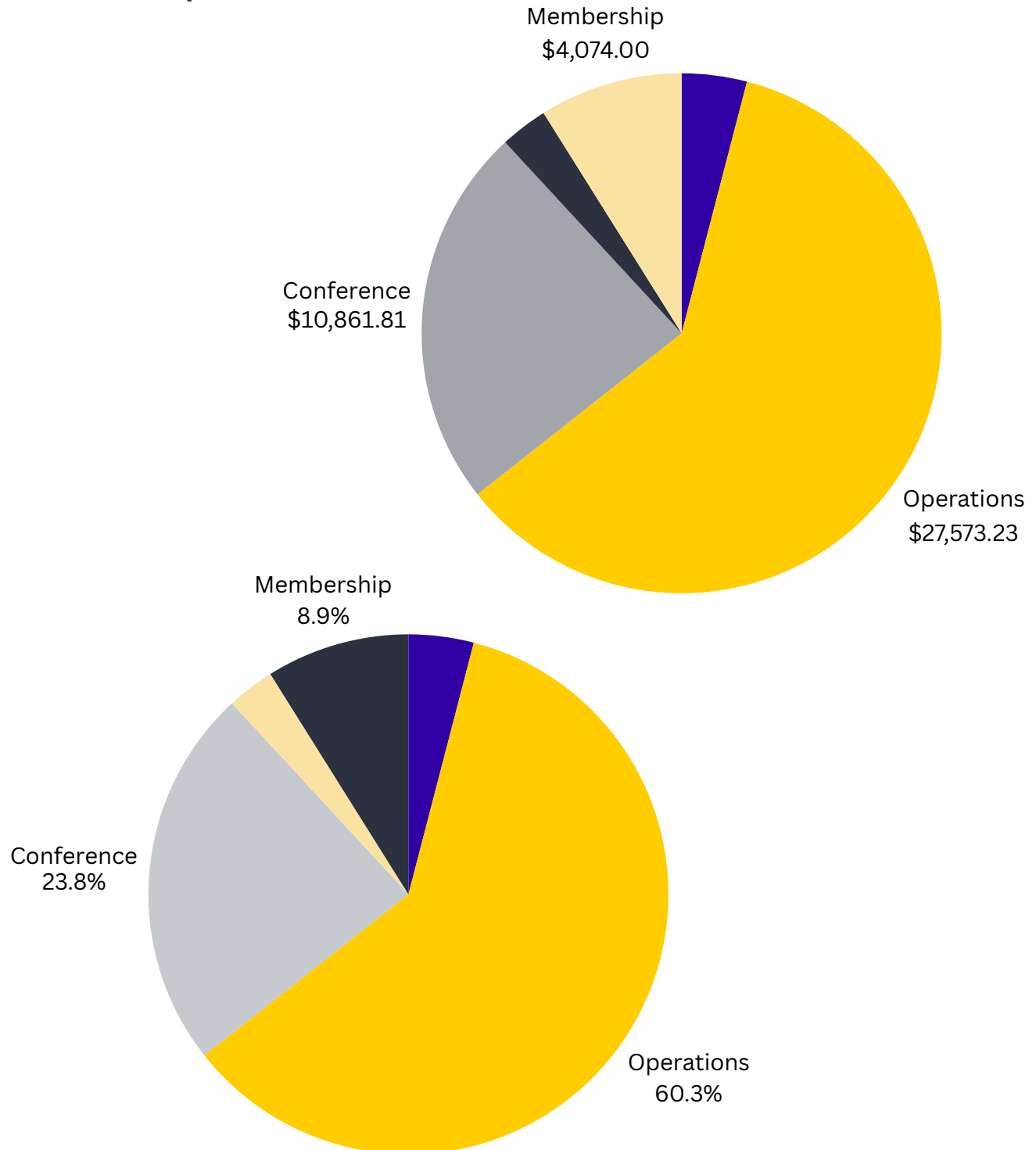
total direct support from
sponsorships for the AFP Utah
Chapter and Utah
Philanthropy Day

2024 Financials

A breakdown of AFP Utah Chapter's expenditures by category for 2024.

\$45,711.87

2024 Total Expenditures





The Association of Fundraising Professionals empowers individuals and organizations to practice ethical fundraising through professional education, networking, research and advocacy.

GEORGE S. AND DOLORES DORÉ ECCLES
F O U N D A T I O N

LARRY H. & GAIL
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