



## **Foundation for Clinical Pastoral Education**

### **Executive Director**

### **Annual Report 2009**

At the end of the first calendar year of business conducted by the Foundation for CPE, the organization is poised to secure the financial future of ACPE as it offers innovative programs in spiritual education for persons of diverse faith groups. In spite of a recession in the United States and the relatively unfamiliar nature of fundraising to ACPE, the financial gains of the Foundation were very respectable. Moreover, a crucial achievement was the creation of the volunteer infrastructure. This document provides the essential statistics with commentary about the formal start-up of the Foundation for CPE in 2009.

#### ***Investments***

The investments increased in 2009. The amount transferred from the ACPE to the Foundation was \$1,001,899. The funds fell below \$900,000 early in 2009 when the U.S. market declined. By December 31, 2009, the total investments were \$1,290,946.

#### ***ACPE Grants***

The Foundation gave the first of what is anticipated to be countless grants to the ACPE for programs. In March, \$20,000 was transferred from the unrestricted Endowment to the ACPE. The number of applications for new programs submitted to the ACPE New Generations Committee greatly increased in 2009. The ACPE Board of Representatives made a second request for \$25,000, which the Foundation Board of Directors approved in December.

#### ***Volunteers***

In 2009, a total of 44 persons volunteered time and energy for the Foundation for CPE on behalf of the ACPE. Most notable were the thirteen Directors on the Board. Eight volunteers joined the thirteen Directors to compose the Campaign Cabinet. Four Portfolios reported to the Campaign Cabinet, and 22 persons actively served on these committees. The first training of volunteers to solicit individual gifts occurred in July, and 18 ACPE Supervisors participated. Several volunteers took more than one of the above roles as they helped lay the groundwork necessary to develop and implement the campaigns for ACPE.

#### ***Portfolios***

Annual Fund - The Portfolio conducted the most successful campaign to date for ACPE. The 2008 Annual Campaign, which began mid-year, extended through February 2009. Including the generous matching gift of Madeline and Howell Adams, \$296,520 was donated for Foundation operating costs. The abbreviated 2009 Annual Campaign raised \$35,889. In July, the Annual Fund chair and co-chair hosted

the first training event for solicitation of major gifts. ACPE Supervisors from across the country and every ACPE Region participated.

Capital Improvement Project - A volunteer from the Foundation Board and another from the ACPE Board and Representatives accepted co-leadership of this Portfolio. Their work culminated in a report to the ACPE Board of Representatives (BoR) in early November that was made in collaboration with the ACPE Facilities Sub-Committee. The CIP presentation emerged from the ACPE-Foundation Visioning Session in Orlando in early 2009 and the Marketing Survey and Assessment conducted by the fundraising consultants, Myerberg Shain & Associates, in late summer. In response to the CIP and Facilities report, the ACPE BoR voted to engage in a capital campaign. Another generous gift made possible by Madeline and Howell Adams was designated to conduct the capital campaign. As 2009 ended and 2010 began, the CIP and Facilities chairs were working closely with ACPE and Foundation leadership to assess a potential building site in Decatur, Georgia.

Foundations and Grants – The least developed activity was grant applications. A group of private foundations turned down the first application in early spring. The reason given was that previous recipients would receive what were limited 2009 funds. After receiving submissions from ACPE Centers and Supervisors across the country, in September the ACPE submitted the first application for federal funds (USDA) for new training programs in three rural areas. The grant decision was pending at the close of 2009.

Planned Giving and Endowment – This Portfolio had the largest number of volunteers. Retired ACPE Supervisors readily offered their enthusiasm and advocacy for recruiting gifts for ACPE via the Foundation. A major focus of the committee’s work was developing a Letter of Intent and beginning distribution of the Letter to Foundation leadership and ACPE Retirees. The Portfolio ended the year anticipating: (1) continued distribution of Letters of Intent to the ACPE BoR, Regional Leadership and Retired Members, (2) implementation of two to three planned giving presentations to ACPE members and chaplains in each Region in 2010, and (3) creation of giving societies.

### ***Marketing***

Internal – 2009 communications about the Foundation and development focused on the ACPE. With little knowledge about fundraising and fund development, ACPE leaders and members had opportunities to learn. Information about the Foundation was provided for members in the *ACPE News*, at regional presentations, and through volunteer opportunities, to name a few. Two Foundation brochures were available at the ACPE Conference, Regional Meetings and all Foundation presentations – “Spiritual Care Through Education – Foundation for Clinical Pastoral Education” and “In the Spirit of Community – A Guide to Planned Giving.” ACPE leaders such as the Board of Representatives, Officers, Regional Directors and Chairs received email communications and participated in telephone conferences with Foundation leadership. Launched in April, the Foundation website supplied information, as well as the opportunity to make a bank donation on line.

External – As Portfolio tasks evolved beyond the range of ACPE, these committees began to define their marketing needs to the broader community. The Foundation and Grants Portfolio requested flyers or brochures for specific ACPE Funding Priorities in order to approach major donors in 2010. With the engagement of a capital campaign, the Capital Improvement Portfolio also anticipated and budgeted for well-designed and versatile brochures.

### ***Foundation Staff and Office***

Two persons work fulltime in the Foundation office - the Executive Director and the Executive Administrative Assistant, who was hired in mid-January 2009. Both received training for the fundraising software. Maintenance of the confidential database was and will remain essential for efficient records and effective campaigns. The Executive Director and Administrative Assistant provided the resources necessary for volunteers to conduct campaigns and pursue fundraising. The Executive Director worked cooperatively with the consultants to build the infrastructure, train volunteers, and plan for and conduct campaigns.

### ***Concluding Comments***

In its first year of business, the Foundation for CPE laid the groundwork necessary for conducting fundraising campaigns, building the endowment, and promoting the Foundation and the Association for Clinical Pastoral Education to the community. The investments for ACPE grew. A core group of volunteers was trained and is focused on four distinct avenues of fundraising. The staff, office, and infrastructure for fundraising are well established. The Foundation for CPE and ACPE are committed to fundraising in order to carry out the mission of the ACPE.

The Rev. Deborah J. Whisnand  
Executive Director  
January 10, 2010

**2009 Statistical Summary – December 31, 2009**

Investments

Endowment	\$ 936,073
Glaz-Plummer	\$ 131,634
Thomas Hemenway	\$ 44,608
ACPE Regions	<u>\$ 178,632</u>
Total	\$1,290,947

2009 Gifts

Total	\$ 358,313	136 Donors
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<u>Campaigns</u>	<u>Gifts/Pledges</u>	<u>Donors</u>
2008 Annual	\$ 170,685	39
2009 Annual	\$ 35,889	107
Capital Campaign	\$ 251,500	3
Planned Giving		
--Endowment	<u>\$ 47,714</u>	<u>3</u>
Total	\$ 505,788	152

<u>Tributes</u>	<u>Amount</u>	<u>Donors</u>
Honor	\$ 550	7
Memorials	<u>\$ 1,625</u>	<u>7</u>
Total	\$ 2,175	14

<u>Outstanding Pledges</u>	<u>Amount</u>	<u>Donors</u>
Capital Expenses	\$ 150,000	1
Unrestricted	<u>\$ 60,312</u>	<u>45</u>
Total	\$ 210,312	
--Past Due	\$ 20,432	33

Operating Budget

Revenues	\$424,942
Expenses	\$463,474
Net Revenues	(\$38,532)