

**AFP Aloha Chapter
2022 Annual Report**
*as presented at the 2022 Annual
Membership Meeting*



**AFP Aloha Chapter
2022 Annual Membership Meeting Agenda & Corporate Engagement Presentation
December 1, 2022
BSA, Aloha Council - President's Hall**

12:00pm – Guest Arrival

12:05pm – Welcome - Michelle Morihara, CFRE, AFP Aloha Chapter President

12:15pm – 2022 AFP Aloha Chapter Annual Membership Meeting - Michelle Morihara, CFRE

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|------|---|------------------------------------|
| I. | Call to Order | Michelle Morihara, CFRE, President |
| II. | Approval of 2021 Annual Meeting Minutes | Michelle Morihara, CFRE |
| III. | Review of 2022 Financials | Angela Britten, CFRE, Treasurer |
| IV. | Recap of 2022 | Michelle Morihara, CFRE |
| V. | Acknowledgment of 2022 Board Members | Michelle Morihara, CFRE |

2022 Board Members

Officers

President

Michelle Morihara, CFRE

Past President

Angela Britten, CFRE

President-Elect

Janice Knapp, CFRE

Treasurer

Angela Britten, CFRE

Secretary

Rüdiger Rückmann

Directors

Ryan Catalani

Connie Choy

*Malu Debus **

Colette Forcier

*Ellise Fujii **

Cynthia Lallo, CFRE

*Robin Pratt **

Kendra Sia

*Bran-Dee Torres **

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| VI. | Approval of 2023 Board Slate | Michelle Morihara, CFRE |
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Officers

President: Michelle Morihara, CFRE, Friends of Iolani Palace

Past-President: Angela M. Britten, CFRE, Hawai'i Land Trust

President-Elect: Janice Knapp, CFRE, Shriners Hospitals for Children-Honolulu

Secretary: Rüdiger Rückmann, Honolulu Waldorf School

Treasurer: Budd Lauer, Maryknoll School

Directors

Dr. Celina Barrios, Honolulu Waldorf School
Ryan Catalani, Family Promise of Hawai'i
Connie Choy, Hawai'i Appleseed Center
Colette Forcier, CFRE, Hawai'i Pacific Health
Harmony Hallas, Hawai'i Community Foundation
Cynthia Lallo, CFRE, CLC Consulting Group
Edward Nishioka, Boy Scouts of America, Aloha Council
Jennifer Onishi, Hawai'i Foodbank
Kendra Sia, Chaminade University of Honolulu
Jaqui Sovde, Kamehameha Schools/Ke Alii Pauahi Foundation
Kerri Van Duyne, YMCA of Honolulu

VII. Acknowledge New Board Members

Michelle Morihara, CFRE

VIII. Meeting Adjournment

Michelle Morihara, CFRE

**Board members who have completed their current term.*

12:25 pm – Prize Giveaways: Ellise Fujii, Membership Committee Chair

12:30pm – Presentation: “Strengthening Corporate Partnerships” by Amanda Price, Director of Philanthropy, Hawai'i Pacific Health

Our Presenter: Amanda Price



Currently the Director of Philanthropy at Hawai'i Pacific Health with nearly 15 years working fundraising and development specializing in the health care industry. Responsible for the development and implementation of a comprehensive giving program that includes oversight of advancement services, annual giving, and special events fundraising. Annual fundraising programs include direct mail, grateful patient giving, third party events, co-branded fundraising, Hawaii Pacific Health's internal Employee Giving Campaign, corporate giving, and stewardship of annual donors. Amanda earned a Master of Business Administration (M.B.A.) focused in Healthcare

Management from University of Hawaii - Shidler College of Business in 2016.

1:15pm – Prize Drawings - Ellise Fujii

Thank you to the following board members who donated prizes: Angela Britten, CFRE/Hawai'i Land Trust; Colette Forcier, CFRE/Hawai'i Pacific Health; Ellise Fujii/Lili'uokalani Trust; Michelle Morihara, CFRE; Ed Nishioka/Boy Scouts of America, Aloha Council; Susan Oshiro; Rüdiger Rückmann; and Kendra Sia.

1:30pm – Closing/Mahalo - Ellise Fujii





Message from Aloha Chapter President Michelle Morihara, CFRE



Aloha! The Association of Fundraising Professionals Aloha Chapter moved forward in support of Hawaii's Professional Fundraisers including monthly virtual Coffee Talks and Fundamentals of Fundraising sessions as well as an entirely in-person National Philanthropy Day Conference & Awards Luncheon this year.

I am thankful for the Aloha Chapter's Board of Directors, Chapter Administrator, NPD Co-Chairs, Chapter Committee Members, Chapter Members, and collaboration with Hawaii and partners beyond in advancing philanthropy through professional and ethical fundraising.

Congratulations to our incoming board members and mahalo piha to our departing board members for their dedication of their time, talent and treasure leading our local AFP chapter.

On behalf of the AFP Aloha Chapter board, we wish all of you a wonderful holiday season and look forward to seeing and hearing from you in 2023!

Mahalo,
Michelle

2022 Aloha Chapter Highlights

- ☆ 26 Professional Development sessions held, including 15 in-person sessions at the National Philanthropy Day Conference.
- ☆ 7 Scholarships provided Oahu and neighbor island participants for the National Philanthropy Day Conference to advance professional development, valued at about \$2,000.
- ☆ National Philanthropy Day Conference (NPD) and Awards Luncheon at the Sheraton Waikiki, first in-person NPD since 2019!
- ☆ Chapter representation at the AFP ICON 2022 annual conference in Las Vegas, NV on May 2-4 and at the AFP LEAD conference on October 20-22 in Houston, TX.
- ☆ Raised over \$6,900 for the AFP annual campaign Be The Cause, including 100% board participation. If you haven't done so yet, please make your gift TODAY!

2022 Professional Development Highlights

- 7 monthly free virtual Coffee Talks in March, April, May, June, July, August, and October, covering various topics like "Finding the Right CRM For You: Questions to Ask Wherever You Are on Your Data Management Journey", "Get the Scoop! How Bills in Congress Could Help Your Nonprofit's Fundraising", and "Advanced Conversation on CFRE", and many others.
- In-person PBS Hawaii Tour and Talk about "Storytelling" on August 24th with PBS Hawaii's President & CEO Ron Mizutani and Vice President of Communications, Jody Shiroma. Breakfast was sponsored by Jennifer Oyer, CFRE, Community Impact Advisors.
- Free webinar recording: "Fundraising BS: How Behavioral Science Shapes Our Sector and Our Practice" for our members offered in June.
- Fundamentals of Fundraising Course, 2-day virtual session held September 28-29 with 14 participants from Oahu and the neighbor island and 6 Aloha Chapter CFRE-accredited members serving as faculty.
- Our 31st Annual National Philanthropy Day Conference and Awards Luncheon in-person at the Sheraton Waikiki. We honored 7 outstanding community leaders and organizations at the Awards Luncheon attended by about 300 guests. Our all-day conference featured 15 different sessions and 35 presenters and over 110 attendees!



AFP Aloha Chapter Annual Meeting

December 14, 2021

Virtual Meeting Via Zoom with Board Members in attendance (live/in-person)

Lili'uokalani Center (formerly the Honolulu Club -- 932 Ward Avenue)

The meeting was called to order at 12:07 p.m. by Angela Britten, CFRE, President.

Member Attendance: Nowshad Ali, Cathy Alsup, CFRE; Elizabeth Aulesbrook, Liza, Boffen-Yordanov, Angela Britten, CFRE; Ryan Catalani, Shari Chang, Connie Choy, Christina Cox, Malu Debus, Shauna Falgout, Barbara Fischlowitz-Leong, Meredith Forbes, Colette Forcier, CFRE; Angie Golis-Yamamoto, Jacquelyn Ingram, Linda Jameson Myers, Mondy Jamshidi Kent, Kagan Jenkins, Janice Knapp, CFRE; Cynthia Lallo, CFRE; Abby Lockler, Leah Lee, Budd Lauer, Cara Mazzei, CFRE; Michelle Morihara, CFRE, Dorian Nakamichi, Larry Rodriguez, Rüdiger Rückmann Sanae Tokumura, ACFRE; Pomai Toledo, Bran-Dee Torres, Inger Tully, CFRE; Keoni Vaughn, Alex, Wereszczynskyj, Kip Wilborn, and Susan Oshiro, Administrator.

Guest Attendance: Ellen Ng, SaraLyn Smith, Ellie Ventula-Honda, and Charles Vincent.

Approval of Minutes: The meeting minutes of the 2020 Annual Meeting minutes was circulated in the annual meeting program for review. The motion to approve the minutes was made by Pomai Toledo and seconded by Colette Forcier and approved.

Finance/Treasurer's Report: Angie reviewed the 2021 financials, which were included in the annual meeting program. The motion to approve the Finance/Treasurer's Report was made by Pomai Toledo, seconded by Keoni Vaughn, and approved.

Recap of 2021 Chapter: Angie directed attention to the annual meeting program, which contained her Chapter President's message and the Chapter's highlights from 2021. Highlights included the following:

- 13 Professional Development sessions presented to 189 professional fundraisers
- 14 Professional Fundraisers completed Fundamentals of Fundraising course in September
- 6 scholarships provided by AFP Aloha Chapter for the 2021 National Philanthropy Day Virtual Conference
- 3 Aloha Chapter members achieved their CFRE credentials
- About 300 attendees for our in-person National Philanthropy Day Awards Luncheon and Virtual Conference
- Raised \$5,359.04 (to-date) for the AFP annual campaign, Be the Cause, including 100% board participation

2021 Professional Development was also recapped in the report and included:

- Over 269 Participants Attended 8 Free “Coffee Talk” Sessions held February through September, with fundraising “talk story” topics: Social Media, Grants, Recurring Giving, Donor Advised Funds, Storytelling, Capital Campaigns, CFRE Certification and Board Fundraising
- Quarterly Live Webinar Sessions: “What Happens After You Submit Your Grant Proposal?” presented by Larissa Kick, Hawaii Community Foundation, with 21 attendees; “Managing the Ask...Virtually” presented by Diana Carlson, Catapult Fundraising, with 12 attendees; “Pop Goes Development for Small Shops” presented by Paul Dunne, CFRE, Catapult Fundraising, with 13 attendees; “Tales From the Crypt: Horror Stories of Fundraising” presented by Jay Frost, Frost on Fundraising, with 10 attendees, and Recorded Sessions offered for those interested in our virtual offerings but could not attend the live sessions
- Complimentary Recorded Webinar for AFP members entitled “Connecting Real Live Humans to your Annual Fund Efforts through Crowdfunding” offered in October-December, with 11 member downloads
- September 13-15 – Fundamentals of Fundraising, 3 half-day trainings virtually: 14 attendees, including 2 participants from Hawaii Island; Led by 9 Aloha Chapter CFRE-accredited members serving as faculty and facilitators
- November 16 – National Philanthropy Day Virtual Conference, 11 virtual sessions were offered throughout the day, attended by 135 participants and presented by 17 fundraising colleagues

Acknowledgement of 2021 Board Members:

Angie expressed gratitude to the members who have served on the 2021 board. Officers: Angela Britten, CFRE (President); Cathy Alsup, CFRE (Past President); Michelle Morihara, CFRE (President-Elect); Keith Greer, CFRE (Treasurer); Janice Knapp (Secretary). Directors: Ryan Catalani; Colette Forcier, CFRE; Ellise Fujii, Cynthia Lallo, CFRE; Bran-Dee Torres; Pomai Toledo, Inger Tully, CFRE; and Keoni Vaughn.

Approval of 2022 Board Slate: Angie directed attention to the 2022 Board of Directors slate, which was included in the annual meeting program:

President: Michelle Morihara, CFRE; Past President: Angela Britten, CFRE; President-Elect: Janice Knapp, CFRE; Secretary: Rudiger Ruckmann (Rudy); Treasurer: Keith Greer, CFRE; Directors: Ryan Catalani; Connie Choy; Malu Debus; Colette Forcier, CFRE; Ellise Fujii; Cynthia Lallo, CFRE; Robin Pratt; Kendra Sia; Bran-Dee Torres. The motion to approve the 2021 Board of Directors Slate was made by Ellise Fujii, and seconded by Inger Tully, and approved.

Acknowledge New Board Members: Angie recognized the new board members who are joining the board in 2021.

There being no further business, the meeting was adjourned at 12:15 p.m.

Respectfully Submitted, Janice N. Knapp, CFRE, Secretary, AFP Aloha Chapter



**AFP Aloha Chapter
Balance Sheet
As of October 31, 2022**

Current Assets

Checking/Savings

First Hawaiian Checking \$45,408.55

Savings-Capital One \$12,159.04

Total Checking/Savings \$57,567.59

Total Current Assets \$57,567.59

Equity

Opening Balance Equity \$40,171.58

Retained Earnings \$1,749.30

Net Income \$15,646.71

Total Equity \$57,567.59

Total Liabilities & Equity \$57,567.59