

Summer 2004



The Glass Menagerie

...a message from Paul Glass, President of CVAS

CVAS has reached a major milestone – for us, anyway, this is the beginning of our second series of quarterly newsletters. Maybe this time next year, we'll be whispering among ourselves in hushed tones, "Three-peat".

The feature article in this issue puts forth a theory about the maturing population in the United States and how it could potentially affect charitable giving to nonprofits.

As both Kelly's Kolumn quote by Aristotle and LeAnn Walters' reference to Maslow's hierarchy state, we all have needs, and giving as well as receiving are joyous events to the participants.

We hope you find our articles interesting and helpful. We would appreciate your feedback about the newsletter. Please e-mail us at: info@cvasusa.org to provide us with feedback and ideas.

CVAS Stars



CVAS recognizes that its staff and all of the nonprofits and volunteers associated with it are Stars. But we have some SUPER-STARs to recognize in this quarter's newsletter.

GOLD STAR to the **California Society of CPAs (CalCPA)**, demonstrating continued support through their recent generous donation.

BRONZE STARS to:

P. Glass
T. Mitchell
D. Sacarellos

Would you or your organization like to be a star too?

Bronze Stars up to \$1000.
Silver Stars up to \$2500.
Gold Stars \$2501 and up

State Challenge – Does your state have a CPA organization like CalCPA? CVAS challenges them to meet or beat the donation from CalCPA.

Checks can be sent directly to **CVAS at 920 Hampshire Road, #A-29, Westlake Village, CA 91361**, or we are able to accept donations *on-line* at www.cvas-usa.org using American Express, Discover, Mastercard, or Visa, via our secure Web site connection. Remember, Clearinghouse for Volunteer Accounting Services is a 501(c)(3) nonprofit corporation, so your donation is tax deductible. We are grateful for any and all support.

Enjoy the Summer 2004 issue,

Paul Glass

Kelly's Kolumn

by Kelly Ablinger, CVAS Program Administrator

The unfortunate need people who will be kind to them; the prosperous need people to be kind to. **Aristotle**



Editorial Staff Meeting ...

Our staff may disagree from time to time on some subjects, but we all agree that the volunteers and nonprofits that register with CVAS are the cat's meow!

We wish to welcome the organizations that registered this past quarter:

- The Sarcoma Alliance (Mill Valley, CA)
- Humunya Foundation (Oakland, CA)
- SOMAID (Aurora, CO)
- Global Philanthropy Counseling (Oakland, CA)
- Wm. E. Morris Inst. for Justice (Phoenix, AZ)
- Wavecrest (Placentia, CA)
- Everybody Wins! Los Angeles (Culver City, CA)
- Diabetes Scty. of Sta. Clara Valley (San Jose, CA)
- San Leandro Girls Club (San Leandro, CA)
- Education Advantage Fdn. (Santa Monica, CA)
- San Diego Chamber Orchestra (San Diego, CA)
- Stand Up For Kids (San Diego, CA)
- Vision for Success School (Kew Gardens, NY)
- Juvenile Court Book Club, Inc. (San Diego, CA)
- Earthshare NJ (Trenton, NC)
- Camp Quality Oregon (Eugene, OR)
- Brothers & Sisters Combined Uiterernity (Brooklyn, NY)
- Peninsula Women's Chorus (Palo Alto, CA)
- Bright Move Network (Cedar Falls, IA)
- ArchLUG (Fenton, MO)
- Sunhouse (Lodi, CA)
- MOUSE (New York, NY)
- NE Minnesota Area Health Ed Center (Hibbing, MN)
- Savage Jazz Dance Company (Oakland, CA)
- Colorado Film Foundation (Denver, CO)
- Peace Village, Inc. (Eugene, OR)
- Imagination Express (Bonita, CA)
- The Honey Bee Support Center (Chicago, IL)
- Blacksmith Institute (New York, NY)
- Choose to Laugh (Los Angeles, CA)
- HER2 Support Group Org (Carlsbad, CA)
- Kirk of St. Nicholas Uniting (Aberdeen, Scotland)
- Southern Conservation Trust (Peachtree City, GA)
- California Carcinoid Fighters (Capistrano Beach, CA)
- Golden Gate Polymer Forum (Palo Alto, CA)

CVAS welcomes the opportunity to assist you in locating a CPA for your needs.

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Kelly's Kolumn (kontinued)

Additionally, CVAS recognizes those volunteers who have just registered and are eager to be matched with an NPO needing assistance. CVAS welcomes:

- Steve Castellano (Baldwin Park, CA)
- Liz Hass-Hill (Richmond, VA)
- Jaime Salinas (Stratford, CT)
- Lalitha Tata (Newark, DE)
- Princy Lala (Deltona, FL)
- Teresa Reese (Lawrenceville, GA)
- Gita Faust (Holland, PA)
- Susana Simon (Newmarket, Ontario)
- Ravi Venkataraman (Monmouth Jct., NJ)
- Jenna Caldwell (San Francisco, CA)
- A. Lee Battershell (Carmichael, CA)
- Darlene Jones (Plainfield, NJ)
- Steve Endo (Moraga, CA)
- Fred Hanson (Redondo Beach, CA)
- Ken Mierzwinski (Lafayette, CA)
- Dorothy Pearlman (Teaneck, NJ)

Introducing the Automatic Notification System

by Kelly Ablinger, CVAS Program Administrator

The previous two issues of the CVAS newsletter have featured articles by Allan Pressel, CEO of Charityfinders, Inc. Allan's company specializes in applying Internet technology to the nonprofit sector, helping nonprofits discover ways to run more efficiently through enhanced technology. Well, CVAS staffers paid attention to Allan's advice, and we are proud to announce the implementation of our Automatic Notification System!

The Automatic Notification System (ANS) serves a dual purpose: timely notification to members, and privacy protection. Here's how it works: When a new nonprofit registers on the CVAS site, the system automatically searches the volunteer database for volunteers listed in the same geographic region. It then sorts the volunteers by services offered, and makes the best "matches" it can find. The system then generates an email to those volunteers, informing them that a new opportunity for service is now available. The volunteer can click on the link to retrieve information about the opportunity. Conversely, the system does the same type of sort for volunteers. CVAS receives reports of all notifications, allowing us to monitor activity and assist where needed.

The following is a sample screen from the new feature now available on the CVAS web site :

In the past, our superb Regional Coordinators have individually matched new registrants— a very personalized, but time consuming process. This new system will allow CVAS to reach more registrants in a timely manner, and will free up the Regional Coordinators to monitor matches in process, and provide personal assistance if necessary.

The ANS has already been implemented, and appears to be working quite well. We welcome your comments and suggestions about the new system, as we are continually striving to improve the speed and quality of our services. You can send your comments to: info@cvas-usa.org.

Make one person happy each day and in forty years you will have made 14,600 human beings happy for a little time, at least.



Charley Willey

Population Shifts & the Nonprofit Community

By LeAnn Walters, MBA, CVAS Business Consultant

The population in the United States is aging. I know that surprises no one. However, the convergence of the maturing population, charitable donation patterns, and the theory of Maslow's hierarchy leads to what I call "Walters' Perfect Parallelogram" (WPP).

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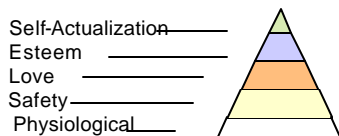
Population Shifts & the Nonprofit Community (continued)

Maslow Summarized:

Simply stated, Maslow's theory is that there is a five-tiered hierarchy of human needs. At the very bottom of the hierarchy are Physiological needs; at the very top are the Self-Actualization needs. In Maslow's theory, healthy humans are constantly striving to reach the highest levels of the hierarchy. Once the basic physiological needs are met, (enough food, water, sleep, etc.), humans move to the next level of the hierarchy, which is the need to feel safe in an ever-changing, somewhat chaotic world. The psychological need of Safety is the security of family and home.

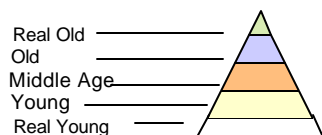
Next in the hierarchy is the need for Love. Once our basic needs for nurturing the self and family are met, we strive for belonging and acceptance by society. The unconditional love and understanding of the social groups around us help to satisfy this need. Following the need for love is the need for Esteem. There are two types of esteem; the self-esteem that results from competence and mastery of a skill or profession, and, somewhat less altruistic, the esteem derived from recognition, admiration and the perception of power. (This may relate to the classic mid-life crisis that results in the purchase of a new, expensive sports car.)

When the above-mentioned needs are met, we move to the highest level, which is Self-Actualization. One who is self-actualized has reached the epitome of being, or becoming all that you can be. One who is self-actualized is ready to "give back". The need is no longer about *me*, but more about how one can contribute, without fear of being unable to meet the more basic needs of the lower tiers. This need usually, but not always, coincides with maturity.



The U.S. Population Shifts

The population is maturing and the "population pyramid" is changing. A century ago, the bulk of the population was young. Medical technology was still evolving, and people had little access to the technology that was available, so people rarely lived to a "ripe old age" - beyond their 40s. Thus the population pyramid looked like this:

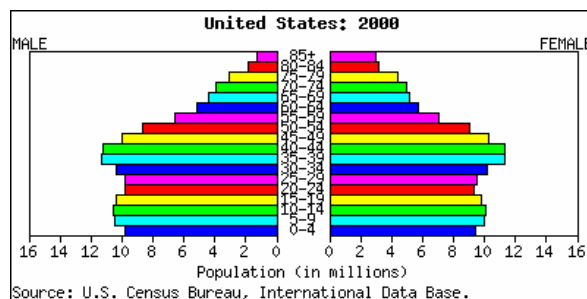


If you compare these two pyramids (Maslow's hierarchy and the population pyramid), you will find they match perfectly in the "olden" days. Thus, the need to "give back" outlived the actual aging process for the majority of Americans.

The population is now living longer than ever, largely due to advances in technology, education and health care. What is occurring is that the population is actually shifting to an inverted pyramid. The "Baby Boomers" have aged, and the economy has evolved from agricultural (requiring

lots of healthy offspring to work the farm) to industrial, with mechanized farming. As a result, the Baby Boomers have now created another boom of their own.

The actual numbers for the year 2000 are reflected in the following table from the US Census Bureau:



Okay, so this doesn't look quite like a pyramid - yet. But if the pattern continues, it *could* look like an inverted pyramid.

Donation Patterns

According to, "Global Assignment Americans Abroad" (The Adams Report), "Giving to charity hit a record \$190 billion in 1999 - an increase of 41% since 1995, but the percentage of Americans making charitable gifts had not increased."

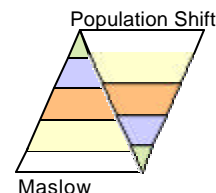
What accounts for this philanthropic rise, according to the Adams Report, is that "Americans age 65 and older are more likely to give and to give in larger amounts. Those who are of age 65 to 74 are 24% more likely to give to charity than Americans in the 45 to 54 age bracket." Interesting also is that they give 28% more frequently than the younger age group and give larger gifts. The very wealthy are likely to give almost 3 times as much to charity, albeit through a bequest, rather than during their lifetimes (\$8.9 million versus \$3.1 million in the ten years prior to death.)

Finally, the aging of the Baby Boomers may result in substantially larger charitable donations in the future. By 2020, the number of Americans age 65 and older will have increased from 12.6% in 1999 to 16.5%. This fact, coupled with the increased median household net income, may mean that there is more to give.

Additionally, we are being influenced by super-wealthy models of leaders such as Bill Gates, who expects his children to "earn" their keep, as opposed to inheriting it. Perhaps Bill understands the meaning of Maslow's hierarchy more than most. Let your children understand the ladder through their own experiences.

Walters' Perfect Parallelogram (WPP)

If you are following my logic, then you understand my prediction about the "WPP". As the bulk of the population becomes older, they are likely to achieve Maslow's Self-Actualization.



Since a self-actualized, mature population is both ready to "give back" and has had a lifetime to accumulate wealth (and perhaps fewer grandchildren looking for an inheritance), the implication to nonprofits is that charitable giving will go up with the maturing population. It is important for nonprofits to recognize this trend and develop strategies to build relationships with this group of the population while it is still in its 50s. This strategy may not mean an immediate infusion of cash, but does position the nonprofit for increased donations in the long-term.