



LEAVE A LEGACY®

**Two Days of Exciting Professional Development Programs**

# **PHILANTHROPY MIAMI 2013**

THURSDAY, FEBRUARY 21 & THURSDAY, MARCH 14, 2013

**Leadership  
Forum**

**Toolkits**

**Fundraising  
Basics**

**THURSDAY, FEBRUARY 21, 2013** | 11:30 a.m. Registration  
JUNGLE ISLAND | 1111 PARROT JUNGLE TRAIL

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11:30 a.m. **Registration & Lunch**

Noon - 12:30 p.m. **Setting the Stage**

*Noel J. Guillama-Alvarez, Immediate Past Chair, FIU Foundation Board*

12:30 - 1:30 p.m. **Overhead is Not a Dirty Word: Capitalism and How it Can Help Non-Profits**

*Keynote: Dan Pallotta, Chief Humanity Officer, Advertising for Humanity*

Dan Pallotta is a radical. His revolutionary ideas are challenging the status quo in the philanthropic sector. His evangelism to empower non-profits to operate with the same economic freedoms that we give to business has taken the sector by storm and is the message of his book *Uncharitable: How Restraints on Nonprofits Undermine their Potential*. His latest book, *Charity Case: How the Nonprofit Community Can Stand Up for Itself and Really Change the World*, outlines his blueprint for a brave national leadership movement to change the way the public thinks about charity.

**Panel Discussions: It Takes Leadership: Implementing Intriguing Ideas**

Two separate panel discussions will react to Dan's often-provocative ideas and start a conversation about bringing change to local non-profit organizations. The first will feature three of Miami's most creative chief executives; the second will include some of our community's top donors and volunteer leaders.

1:30 - 2:20 p.m. Panel I: **Chief Executives**

*Moderator: Dan Pallotta with Gepsie Metellus, Executive Director, Sant La Haitian Neighborhood Center; Lydia Muniz, CEO, Big Brothers Big Sisters; and John Richard, CEO, Adrienne Arsht Center for the Performing Arts*

2:35 - 3:25 p.m. Panel II: **Volunteer Leadership**

*Moderator: Noel Guillama-Alvarez with Trish Bell, Board Chair, Miami Science Museum; Jorge A. Plasencia, Co-Founder & Chairman Emeritus, Amigos for Kids*

3:25 - 4:25 p.m. **Roundtable Discussion**

*Moderators: Dr. Colleen Robb and Glenn Kaufhold, GKollaborative*

4:25 - 5:00 p.m. **Closing Thoughts**

5:00 - 6:00 p.m. **Networking Reception**

**FOR MORE INFORMATION ABOUT PHILANTHROPY MIAMI 2013:**

Please contact Edwina Lau, Chase Marketing Group, at 305.379.0800 or [elau@chasemiami.com](mailto:elau@chasemiami.com).

# Tips and Tactics for Non-Profit Success

## A Day of Learning for Non-Profit Executives

**THURSDAY, MARCH 14, 2013** | 8:30 a.m. – 5:00 p.m.

HILTON MIAMI DOWNTOWN | 1601 BISCAYNE BOULEVARD

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8:30 – 9:00 a.m. **Registration and Breakfast**

9:00 – 9:30 a.m. **Opening Remarks & Introduction**

*Matt Haggman, Miami Program Director, Knight Foundation*

### **Innovation, Leadership and Strategic Development**

*Keynote Speaker: Susan Packard, Co-Founder of HGTV*

A visionary TV network executive, Susan Packard believes that innovation is one of the keys to success for non-profit organizations in today's competitive world. As co-founder and chief operating officer of HGTV, Packard created a new niche in the lifestyle marketplace, along with a corporate culture that recruits and retains exceptional talent. Her approach to leadership and innovation at CNBC, Food Network and other popular cable channels has helped her build extraordinary organizations that bring fresh ideas to the market.

9:30 – 10:15 a.m. **Exploring a Local Model of Innovation and**

**Strategic Partnerships** *Convener: Susan Packard; with Harve Mogul, President and CEO, United Way of Miami-Dade; Maria C. Alonso, SVP, Miami and Fort Lauderdale Market Manager, Corporate Social Responsibility, Bank of America; Fred Stock, CEO and President, Jewish Community Services of South Florida*

10:30 - 11:30 a.m. **Toolkits: Session I**

*(Select from one of the following concurrent sessions)*

#### **A. Fundraising Top Ten: 10 Things You Can Do to Improve Your Fundraising Tomorrow**

*Convener: CJ Ortuno, Executive Director, SAVE Dade*

Whether you're looking for fresh ideas, practical advice or best practices, this session will provide you with hands-on suggestions to generate immediate results.

#### **B. Corporate Partnerships**

*Convener: Munisha Underhill, Senior Director, Advancement, Adrienne Arsht Center; with Jacquie O'Malley, Group Vice President, United Way of Miami Dade*

This session covers the practical side of building win-win corporate partnerships that can increase your organization's human and financial capital, and support your ongoing mission.

#### **C. Planned Giving on a Napkin: Demystifying Legacy Planning**

*Convener: Steven L. Schwartz, Director of Estate and Planned Giving, University Advancement, Florida International University; with Cynthia L. Beamish, Executive Director, Planned Giving, University of Miami; Lydia Harrison, NWSA and WLRN Legacy Society Founder*

Translating the passion of leaders, supporters and donors into a legacy gift is one of the best techniques to build your organization's long-term sustainability. This panel will discuss how to build a program and capitalize on this 'best kept secret' in the fundraiser's toolkit.

## 11:30 a.m. – 12:30 p.m. **Toolkits: Session II**

(Select from one of the following concurrent sessions)

### **A. Prospecting for Major Gifts: Theory, Technology and Practice**

Convener: *Christopher Kraus, Chief Operating Officer, Baptist Health South Florida Foundation; with Ellen Oppenheimer, Vice President Major Gifts & Planned Giving; WPBT Channel 2; Churé Gladwell, Senior Director, Advancement, Adrienne Arsht Center Foundation*

Learn how to use tools and existing data about people who are giving you money and people who should be giving you money.

### **B. Measuring Your Outcomes**

Convener: *Mayur Patel, VP/Strategy and Assessment, Knight Foundation*

The biggest difference between a non-profit and for-profit is our ability to define and measure success. Learn how to capture the impact of your work in a way that can be promoted and communicated.

### **C. Collaboration: A Neighborhood Case Study in Overtown**

Convener: *Sonia Jacobson, Executive Director, Dress for Success Miami; with Saliha Nelson, Vice President, Urgent, Inc.; Linda Schotthoefer, Director of Community Initiatives, United Way of Miami-Dade; Tisha McGhee, Ph.D., Assistant Professor, Barry University*

Non-profits can make a big difference in improving living conditions in underserved communities. This session will share how an emerging community collaborative is moving to a system of intervention to benefit the residents of Miami's Overtown neighborhood.

## 12:45 – 1:45 p.m. Luncheon Panel: **Strategic Lessons Learned at Harvard**

Convener: *Matt Haggman, Miami Program Director, Knight Foundation; with Thom Collins, Director, Miami Art Museum; Victoria Rogers, Executive Vice President, New World Symphony*

Two local arts executives will share their experiences learned at a summer intensive in *Strategic Perspectives in Nonprofit Management* at Harvard Business School. Their insights, grounded in this changing environment, will provide valuable lessons for our local non-profit community.

## 2:00 – 3:00 p.m. **Board Development and Service: How to Build a Committed and Engaged Corps of Leaders**

Convener: *Jane Gilbert, Community Affairs Officer - South Florida, Wells Fargo; with Howard R. Lipman, Senior Vice President, University Advancement; President & CEO, FIU Foundation Inc.; Dennis Edwards, Chair, NWSA Foundation Board; Terrie Temkin, Founding Principal, CoreStrategies for Nonprofits, Inc.*

A committed and engaged board of directors is one of the most powerful resources for any non-profit. In this session, you'll learn what strategies and tactics are most effective in building a strong board of volunteer leaders.

## 3:00 - 4:00 p.m. **Paradigm Shift: Engaging a New Generation**

Convener: *Marlon Hill, Partner, delancyhill, PA; with Tracey Robertson Carter, Director of Membership, Leadership Circle, MOCA; Jonathan Raiffe, Founding Chair, The JCS Alliance; Estrellita Sibila, Founder, PhilanthroFest, LLC*

As the baby boomers enter retirement, non-profits have a unique opportunity to engage a new generation of donors. This session offers fresh ideas for capitalizing on this demographic shift in the philanthropic landscape.

## 4:00 – 4:30 p.m. **Final Remarks and Special Thanks**

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HILTON MIAMI DOWNTOWN | 1601 BISCAYNE BOULEVARD

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**Strategic Partnerships** Convener: *Susan Packard; with Harve Mogul, President and CEO, United Way of Miami-Dade; Maria C. Alonso, SVP, Miami and Fort Lauderdale Market Manager, Corporate Social Responsibility, Bank of America; Fred Stock, CEO and President, Jewish Community Services of South Florida*

10:30 – 11:15 a.m. **The Development Cycle: Exploring the Basics**

*Doris Sipos, Development Consultant*

Do you need the basics of fundraising under your belt or a refresher in the fundamentals of development? Come review everything you need to know about the fundraising process, fundraising as a career and standards of the professional practice.

11:15 a.m. – Noon **The ABCs of Grant Proposals**

*Tanisha Hudson, Grants Manager, Planned Parenthood; Victoria Hopta, President, PR by VLH, Inc., Grants Management Consultant*

Grants are an essential component to any multi-dimensional fundraising program. Learn some of the key essentials your organization should have in place to ensure a successful grant writing program.

Noon – 12:45 p.m. **Unlock the Potential of Special Events**

*Noelle Ferguson, Development Officer, Planned Parenthood; Melissa Williams, Special Events Coordinator, Planned Parenthood*

Special events are often a first point of interaction and offer your most dedicated volunteers/donors active leadership roles. Learn how to best capitalize on engaging donors in planning and fundraising.

12:45 – 1:45 p.m. Luncheon Panel: **Strategic Lessons Learned at Harvard**

Convener: *Matt Haggman, Program Director/Miami, Knight Foundation; with Thom Collins, Director, Miami Art Museum; Victoria Rogers, Executive Vice President, New World Symphony*

Two local arts executives will share their experiences learned at a summer intensive in *Strategic Perspectives in Nonprofit Management* at Harvard Business School. Their insights, grounded in this changing environment, will provide valuable lessons for our local non-profit community.

## 2:00 – 2:45 p.m. **Annual Giving: Building a Revenue Stream**

*Reena Ramnarine, Director, Office of Annual Giving at FIU*

Building, maintaining or growing a pool of annual donors can provide an essential stream of unrestricted income. Organizations both large and small can implement annual funds quite easily; our session will explore the methods available to any organization and what you can do to start a successful program.

## 2:45 – 3:45 p.m. **Major Gifts: Cultivate Your Garden**

*Nick Kallergis, Major Gifts, American Red Cross*

Securing major gifts and endowments are the aspiration for every development professional. Learn more about who major gift prospects are, how to spot them in your organization, and how to cultivate and steward successfully.

## 3:45 – 4:30 p.m. **Secrets of a Successful Development Professional**

*Alexandra Mandado, Planned Parenthood; Michael Hughes, FIU Frost Museum of Art; Rhea Beck, Strong Women Strong Girls*

Development professionals are not born, they are trained. Add personality and attitude to the little secrets that can make each of us more patient, efficient, courageous, communicative, and successful.

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# PHILANTHROPY MIAMI

## Diagram of the Day - March 14, 2013 | Hilton Miami Downtown

FUNDRAISING BASICS	TOOLKITS
8:30 - 9:00 a.m. Breakfast & Registration	
9:00 - 9:30 a.m. Breakfast Keynote Speaker: Susan Packard	
9:30 - 10:15 a.m. Exploring a Local Model of Innovation and Strategic Partnerships	
10:30 - 11:15 a.m. The Development Cycle: Exploring the Basics	10:30 - 11:30 a.m. Toolkits: Session I
11:15 a.m. - Noon The ABCs Grant Proposals	11:30 a.m. - 12:30 p.m. Toolkits: Session II
Noon - 12:45 p.m. Unlock the Potential of Special Events	
12:45 - 1:45 p.m. Luncheon Panel: Strategic Lessons Learned at Harvard	
2:00 - 2:45 p.m. Annual Giving: Building a Revenue Stream	2:00 - 3:00 p.m. Board Development and Service: How to Build a Committed and Engaged Corps of Leaders
2:45 - 3:45 p.m. Major Gifts: Cultivate Your Garden	3:00 - 4:00 p.m. Paradigm Shift: Engaging a New Generation
3:45 - 4:30 p.m. Secrets of a Successful Development Professional	4:00 - 4:30 p.m. Final Remarks and Special Thanks

# PHILANTHROPY MIAMI Registration Form

Take advantage of three remarkable professional development opportunities:

**\$200 FULL CONFERENCE PACKAGE (TWO DAYS) - YOUR BEST VALUE!**

**Leadership Forum** - February 21, 2013 • Jungle Island • 11:30 a.m. - 5:00 p.m.

Half-day session for board leadership and senior leaders to explore innovative strategies and bold ideas to enhance non-profit effectiveness.

**Toolkits** - March 14, 2013 • Hilton Downtown Miami • 8:30 a.m. - 4:30 p.m.

A full day of engaging workshops on an array of topics, compelling keynote speakers and networking opportunities with your peers.

## SINGLE DAY PROGRAMS

**\$125 Leadership Forum Only**

**\$125 Toolkits Only**

**\$125 Fundraising Basics Only** - March 14, 2013 • Hilton Miami Downtown

A full-day intensive introduction to fundraising for professionals new to the field.

**BONUS:** By registering for the Full Conference Package or any of the Single Day Programs, you can bring board members, donors or other staff members from your organization to any one session for just \$80.

**Additional Attendee at \$80 per session:**

**Leadership Forum**    **Toolkits**    **Fundraising Basics**

**Please complete a separate registration form for each person attending.**

Name \_\_\_\_\_

Board Member    Donor    Organization Staff (Title \_\_\_\_\_)

Organization \_\_\_\_\_

Address \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Phone \_\_\_\_\_ E-mail \_\_\_\_\_

## METHOD OF PAYMENT:

Visa    MC    AMEX    Check (Please make checks payable to LEAVE A LEGACY)

Name on card \_\_\_\_\_

Card number \_\_\_\_\_

Expiration date \_\_\_\_\_ V-code \_\_\_\_\_

(Visa & MC - last 3 digits on signature panel; AMEX - 4 digits above account number)

Signature \_\_\_\_\_

**Return completed form along with payment to** Chase Marketing Group, 799 Brickell Plaza, Suite 707, Miami, FL 33131; by fax to 305.379.0006. For more information, please contact 305.379.0800 or elau@chasemiami.com