



PHILANTHROPY MIAMI 2013

Changing the Way the World is Changed

A Leadership Forum for Senior Non-profit Executives

**Thursday, February 21, 2013 • 11:30 a.m. to 5:00 p.m. Reception to follow
Jungle Island • 1111 Parrot Jungle Trail, Miami**

11:30 a.m. - Noon **Lunch is served**

Noon - 12:15 p.m. **Welcome & Introductions**

12:15 - 12:30 p.m. **Setting the Stage**
Introductory Remarks: **Noel J. Guillama-Alvarez**

Noel J. Guillama-Alvarez has been described as "a serial entrepreneur." He is a nationally recognized expert and lecturer on healthcare management, healthcare operations and the use of technology in healthcare. Since 1984 he has served as Chairman of Guillama, Inc., a strategic operations consulting and management company in healthcare, technology, construction and real estate. Guillama, Inc. has built/managed the development and/or construction of a wide range of projects including roads, medical facilities, commercial complexes and infrastructure facilities. Since 2003 he has served as Founder and Chairman of The Quantum Group, a healthcare information technology company. He currently serves as Vice Chairman of Palm Beach State College Foundation and is a Trustee of Palms West Hospital. Noel is also the immediate past Chair of the FIU Foundation Board.

12:30 - 1:30 p.m. **Overhead is Not a Dirty Word: Capitalism and How it Can Help Non-profits**
Keynote Speaker: **Dan Pallotta**

Dan Pallotta is a radical. His revolutionary ideas are challenging the status quo in the philanthropic sector. His evangelism to empower nonprofits 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.

Dan founded Pallotta TeamWorks, which invented the multiday AIDSrides and Breast Cancer 3-Day raising over \$580 million. He is the president of Advertising for Humanity designed to help humanitarian organizations succeed by transforming their brands and to guide business's social initiatives. Dan is a weekly contributor to the Harvard Business Review. He has been written about in feature and cover stories in the *Wall Street Journal*, *New York Times*, *Los Angeles Times*, *Washington Post*, and has appeared on *The Today Show*, *CNN*, *American Public Media's Marketplace*, and on numerous NPR stations.

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; final speaker to be confirmed

3:25 – 4:25 p.m. **Roundtable Discussion**
Moderators: **Dr. Colleen Robb & Glenn Kaufhold**

4:25 – 5:00 p.m. **Closing Thoughts**

5:00 – 6:30 p.m. **Closing Reception**



PHILANTHROPY MIAMI 2013

Tips and Tactics for Non-Profit Success

A Day of Learning for Non-profit Executives

Thursday, March 14, 2013 • 8:30 a.m. to 4:30 p.m.
Hilton Miami Downtown • 1601 Biscayne Boulevard, Miami

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

9:00 – 9:05 a.m. **Welcome and Introductions**

9:10 – 9:30 a.m. **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. A co-founder of Scripps Networks Interactive, Packard oversaw the development and launch of DIY Network, Fine Living Network, and online interactive platforms.

Today, Packard draws on her experience to advise leading companies and non-profits on leadership development, innovation and creative strategies. She has been praised as one of the most influential women in the media industry, as well as being named "Woman of the Year in Cable Television" and been inducted in the Cable Hall of Fame. Packard was recently named to the Tennessee Film, Entertainment & Music Commission, and is currently working on a book based on her experiences in business.

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 Ft. Lauderdale Market Manager, Corporate Social Responsibility, Bank of America; **Fred Stock**, CEO & President, Jewish Community Services of South Florida

10:15 – 10:30 a.m. **Break**

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

Here are ten tips that every fundraiser can implement immediately to benefit your organization. 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, Development, United Way of Miami-Dade

Today, collaborative corporate partnerships are vital for a non-profit's sustained success. This session covers the practical side of building those win-win relationships 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 in your organization (large or small) and capitalize on this 'best kept secret' in a fundraiser's toolkit

11:40 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; **Linda Steckley**, Senior Major Gifts Officer, Chautauqua Institution

Want to learn new information about your donors? There are a number of ways you can gather information, but how to get the right information is key. Learn how to use tools and already existing data about people who are giving you money and people that 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; **Tisa McGhee, PhD**, 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 overcoming communication barriers to move from isolated agency operations to a collaborative system of intervention to benefit the residents of Miami's Overtown neighborhood.

12:30 – 12:45 p.m. **Break**

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

South Florida organizations can learn important lessons from Harvard University, a leading-edge academic institution that adapted to the changing philanthropic market and implemented new strategies to build its donor and endowment base.

General Sessions: Interactive Afternoon Sessions

1:45 – 2:00 p.m. **Break**

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 – 4:15 p.m. **Final Remarks and Special Thanks**



LEAVE A LEGACY®

PHILANTHROPY MIAMI 2013

Registration Form

Take advantage of three remarkable professional development opportunities:

\$200 FULL CONFERENCE (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. - 5:00 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 - February 21, 2013 • Jungle Island • 11:30 a.m. - 5:00 p.m.

\$125 Toolkits Only - March 14, 2013 • Hilton Downtown Miami • 8:30 a.m. - 5:00 p.m.

\$125 Fundraising Basics Only - March 14, 2013 • Hilton Downtown Miami • 8:30 a.m. - 5:00 p.m.

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

BONUS: By registering for the Full Conference 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 _____

Please return completed form to Edwina Lau, Chase Marketing Group, 799 Brickell Plaza, Suite 707, Miami, Florida 33131 or elau@chasemiami.com