PHILANTHROPY MIAMI
FUNDRAISING BASICS
An Intensive Overview to the World of Fundraising
TUESDAY, MARCH 20, 2012 | 8:00 A.M. – 5:00 P.M.
JUNGLE ISLAND | 1111 PARROT JUNGLE TRL, MIAMI

8:30 – 9:00 a.m. Registration and Breakfast
9:00 – 9:45 a.m. Opening Remarks
- Keynote Speaker: Joseph L. Falk, Public Policy Advisor, Akerman Senterfitt and Philanthropist

9:45 – 10:15 a.m. Integrated Development Programs and Donor Cycle
- Amazing Raja, FIU College of Business, Assistant Dean, Advancement, Alumni, and Corporate Relations
- Monique Catoggio, FIU College of Business, Director, Advancement and Alumni Relations

10:15 – 11:00 a.m. Overview of the Development Function
- Jane Gilbert, Community Affairs Officer - South Florida, Wells Fargo

11:00 – Noon Breakfast Keynote Speaker

11:30 - 12:15 p.m. Lunch
Philanthropists' Panel: A panel that every non-profit executive should hear
- Moderator: George Lindemann, Chair, Board of Trustees, Bass Museum of Art
- Panelists:
  - Joseph L. Falk, Public Policy Advisor, Akerman Senterfitt and Philanthropist
  - Trish Bell, Co-Chair, Board of Trustees, Miami Science Museum
  - Matt Haggman, Miami Program Director, Knight Foundation

12:30 – 1:30 p.m. Major and Planned Giving
- Capital Giving: Sustaining the Future – Beyond Bricks and Mortar
  - David Lawrence Jr., President, Early Childhood Initiative Foundation
  - Capital Giving: Sustaining the Future: Living the Legacy
  - Deborah S. P. Messer, Chair, Board of Trustees, American Red Cross

1:30 – 2:30 p.m. Annual Giving: A to Z of a Healthy Annual Fund
- Monique Catoggio, FIU College of Business, Director, Advancement and Alumni Relations

2:30 – 3:30 p.m. Toolkits: Session I
- Cynthia L. Beamish, FIU Herbert Wertheim College of Medicine – Alumni Affairs
- Alma Minaya, Baptist Health South Florida Foundation

3:30 – 5:00 p.m. Reception and Networking

PHILANTHROPY MIAMI
FUNDRAISING BASICS
Diagram of the Day - March 20

3:30 – 5:00 p.m. Annual Giving: A to Z of a Healthy Annual Fund

10:00 – 11:00 a.m. Overview of the Development Function

11:00 – Noon Breakfast Keynote Speaker

12:30 – 1:30 p.m. Major and Planned Giving

1:30 – 2:30 p.m. Annual Giving: A to Z of a Healthy Annual Fund

2:30 – 3:30 p.m. Toolkits: Session I

3:30 – 5:00 p.m. Reception and Networking
LEADERSHIP FORUM
Social Entrepreneurship – Opportunity, Resources and Strategic Leadership for Forum
TUESDAY, FEBRUARY 28, 2012 - 8:00 A.M. - 5:00 P.M.
JUNGLE ISLAND | 1111 PARROT JUNGLE TRAIL
MIAMI, FL

Opening Remarks & Introduction
Mark Magnotta, Miami Program Director/Grant Officer, Knight Foundation
Jerome Greenstein, President and Founder, GREIFORUM
Lunch
Hedgren: Networking Opportunity and Entrepreneurial Thinking

Dr. Jeffrey Stamp, CEO, Bold Thinking (Cincinnati)

Introduction: Opportunity and Entrepreneurial Thinking
Glenn Kaufhold, President and Founder, GKollaborative
Matt Haggman, Miami Program Director, Knight Foundation
CJ Ortuno, Executive Director, SAVE Dade

Featured Presentation
Entrepreneurial Thinking in a Social Venture Context
Dr. Joseph Falk, Public Policy Advisor, Akerman Senterfitt and Philanthropist

Panel Discussion
Being Aware of Opportunity and Actively Seeking Opportunity
Moderators: Dr. Jeffrey Stamp, Bold Thinking (Cincinnati)
Gregory Huber, CEO, Urban & Regional Revitalization
Ranging from prospecting, the ask, stewardship, admin, etc… Best practices will be shared, and will be reversed and unscripted on the actual market. Understanding new opportunities and trends and their potential to bridge existing gaps, while also considering how to focus on a basic entrepreneurship standpoint, several successful entrepreneurs present their unique personal experiences. From the basics of leveraging of $100 and $1000 and the larger principles will be shared and presented.

Panel Discussion
Evaluating the Solo Status
Robert Harder, CPA, Of Counsel Per Click
Entrepreneurial thinking is the ability to create and leverage resources, understanding the true value of customer segments, and building a business model in numbers, and making accurate financial projections. Some basic concepts will be presented and explored.

Panel Discussion
Leadership for Forum
A panel that every nonprofit should aspire to
A panel of renowned experts will present to demystify the process of identifying, cultivating, soliciting and closing the people and causes that ask them for money.

Lunch Keynote
Entrepreneurial thinking in a social venture context consists of additional steps in the value
Glenn Kaufhold, President and Founder, GKollaborative

LUNCH RECEPTION
Networking Reception

LEAVE A LEGACY
2011-2012 Sponsors

PHILANTHROPY MIAMI

Sustaining
Miami Beach South Florida Foundation
Unidad Way of Miami Dade
Wife Grape

Supporting
Miami Children’s Hospital Foundation
Miami Foundation
Miami Health South Florida Foundation
Moffitt Cancer Center
University of Miami

CHOOSE TOOLKIT
Please select one Toolkit to attend for each Session:

PHILANTHROPY MIAMI TOOLKITS

SESSION I:

A. TOP 10 TIPS FOR FUNDRAISING SUCCESS
B. COLLABORATION
C. CAREER TRACK

SESSION II:

A. TOP 10 TIPS FOR FUNDRAISING SUCCESS
B. COLLABORATION
C. CAREER TRACK

Registation and Breakfast
9:00 – 10:00 a.m.
Opening Remarks & Introduction
Glenn Kaufhold, President and Founder, GKollaborative
Matt Haggman, Miami Program Director, Knight Foundation
CJ Ortuno, Executive Director, SAVE Dade

Facilitators:

Lunch Keynote
Entrepreneurial thinking in a social venture context consists of additional steps in the value
Glenn Kaufhold, President and Founder, GKollaborative

LUNCH RECEPTION
Networking Reception

PHILANTHROPY MIAMI

3:30 – 5:00 p.m.

Participants will learn about the importance of collaboration as a means to increase your
Participants will learn how to use and measure the use of new media (website, facebook, twitter, blogs, texting) into their annual giving and gift campaign strategies.

Focus: A new way to look at new media
Regina Dill, Executive Director, Bentley Foundation
Participants will learn to use and measure the use of new media (website, facebook, twitter, blogs, texting) into their annual giving and gift campaign strategies.