

YOU CAN'T MISS THIS!

PHILANTHROPY MIAMI
A CONFERENCE IN TWO PARTS



LEAVE A LEGACY®
c/o Chase Marketing Group
799 Brickell Plaza, Suite 707
Miami, Florida 33131

PHILANTHROPY MIAMI FUNDRAISING BASICS

An Intensive Overview to the World of Fundraising

TUESDAY, MARCH 20, 2012 | 8:30 A.M. - 5:00 P.M.
JUNGLE ISLAND | 1111 PARROT JUNGLE TRAIL, MIAMI

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

9:00 – 9:45 a.m.
Opening Remarks
Jane Gilbert, Community Affairs Officer - South Florida, Wells Fargo

Overview of the Development Function
Gloria Danovitz, Chief Development Officer - South Florida Region at American Red Cross
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 professional practice.

9:45 – 10:15 a.m.
Integrated Development Program and Donor Cycle
Annabelle Rojas, FIU College of Business, Assistant Dean, Advancement, Alumni, and Corporate Relations
Monique Catoggio, FIU College of Business, Director, Advancement and Alumni Relations
To effectively raise funds for an organization's mission, it's important to have a comprehensive plan. Participate in learning how to articulate your organization's case for support that includes appropriate giving opportunities and understanding the donor cycle.

10:15 – 11:45 a.m.
Annual Giving: A to Z of a Healthy Annual Fund
Fred J. Menachem, Director of Development, Children's Home Society – Southeastern Division
Nelson F. Hincapie, President & CEO, Voices For Children Foundation
How to develop, maintain and grow a strong Annual Giving Program. Understanding the essentials for success!

Noon – 1:30 p.m. Lunch
Philanthropist's Panel:
A panel that every non-profit executive should hear
Moderator: *Matt Haggman, Miami Program Director, Knight Foundation*
Panelists: *Trish Bell, Co-Chair, Board of Trustees, Miami Science Museum*
Joseph L. Falk, Public Policy Advisor, Akerman Senterfitt and Philanthropist
George Lindemann, Chair, Board of Trustees, Bass Museum of Art
A panel of South Florida Philanthropists will share with us what they like and don't like about being asked and engaged. Sharing best practices from their own perspective about the people and causes that ask them for money.

1:30 – 2:30 p.m.
Major and Planned Giving
Debbie Murcasel-Powell, former Associate Dean - Associate VP for Advancement and Alumni Affairs FIU Herbert Wertheim College of Medicine
Understand and develop a method of major gift development. Learn how to identify and secure low hanging fruit, which is renewable year after year. Realize an immediate return on your investment!

2:30 – 3:30 p.m.
Capital Giving: Sustaining the Future – Beyond Bricks and Mortar
David Lawrence Jr., President, Early Childhood Initiative Foundation
Learn about the intensive function designed to raise a specified sum of money within a defined time period to meet the varied needs of your organization.

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

PHILANTHROPY MIAMI

Diagram of the Day - March 20

| FUNDRAISING BASICS | TOOLKITS |
|---|---|
| 8:30 - 9:00 a.m. Breakfast & Registration | |
| 9:00 - 9:45 a.m. Overview of the Development Function | 9:00 - 10:00 a.m. Breakfast Keynote Speaker |
| 9:45 - 10:15 a.m. Integrated Development Program and the Donor Cycle | 10:00 - 11:00 a.m. Toolkits: Session I |
| 10:15 - 11:45 a.m. Annual Giving: A to Z of a Healthy Annual Fund | 11:00 - Noon Toolkits: Session II |
| Noon - 1:30 p.m. LUNCH Philanthropist's Panel: A panel that every non-profit executive should hear | |
| 1:30 - 2:30 p.m. Major and Planned Giving | 1:45 - 3:30 p.m. Double Session STORYTELLING: Telling your story could be the difference between a "Yes" and "No" FOCUS: A new way to look at media |
| 2:30 - 3:30 p.m. Capital Giving: Sustaining the Future | |
| 3:30 - 5:00 p.m. Reception and Networking | |

PHILANTHROPY MIAMI Planning Committee

Conference Chair:
Glenn Kaufhold, GKollaborative

Program Management:
Abbey Chase & Edwina Lau, Chase Marketing Group

Planning Committee:
Gloria Danovitz
American Red Cross South Florida Region

Churé Gladwell
Adrienne Arsht Center for the Performing Arts of Miami-Dade County

Debi Harris
Women's Fund of Miami-Dade

Alexandra Mandado
Planned Parenthood of South Florida and the Treasure Coast, Inc.

CJ Ortuno
SAVE Dade

Dr. Colleen Robb
Consultant

Marsha Talianoff
University of Miami - School of Education

Munisha Underhill
Adrienne Arsht Center for the Performing Arts of Miami-Dade County

Paul Woehrlé
New World Symphony

2011-2012 LEAVE A LEGACY Steering Committee

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Fiduciary Trust International

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Baptist Health South Florida Foundation

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Donald Kress
The Northern Trust Company

Cheryl Lawko
Museum of Contemporary Art

Partnership for Philanthropic Planning Liaison:
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Baptist Health South Florida Foundation

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Law Offices of Richard Alan Lehrman

Howard Lipman
The FIU Foundation

Lucy Morillo-Agnetti
Miami Children's Hospital Foundation

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Registered Investment Advisor

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Sabadell Bank United

Program Management:
Abbey Chase
Edwina Lau
Chase Marketing Group

YOU CAN'T MISS....

PHILANTHROPY MIAMI 2012

A CONFERENCE IN TWO PARTS
THURSDAY, FEBRUARY 16 & TUESDAY, MARCH 20, 2012



LEAVE A LEGACY®

PHILANTHROPY MIAMI

Event Sponsors

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Program

SunTrust Bank, Foundations and Endowments Specialty Practice

Sustaining

Baptist Health South Florida Foundation
United Way of Miami-Dade
Wells Fargo

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Akerman Senterfitt
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LEADERSHIP FORUM

Social Entrepreneurship – Opportunity, Resources and Strategic Planning: A Leadership Forum for Senior Non-Profit Executives

THURSDAY, FEBRUARY 16, 2012 | NOON – 6 P.M.

AKERMAN SENTERFITT | ONE SE THIRD AVENUE, 25TH FLOOR, MIAMI

Opening Remarks & Introduction

Matt Haggman, Miami Program Director, Knight Foundation

Glenn Kaufhold, President and Founder, GKollaborative

Lunch Keynote

Introduction: Opportunity and Entrepreneurial Thinking

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

Entrepreneurial thinking in a social venture context consists of additional steps in the value capture/value creation cycle. The customer you serve and the customer who pays are not the same individual. In looking at the added steps involved in the social venture business model, entrepreneurial strategy and entrepreneurial thinking will be reviewed in order for leaders to consider their resources and competition in ways that lead to your advantage.

Panel Discussion

Being Aware of Opportunity and Actively Seeking Opportunity

Moderators: *Dr. Jeffrey Stamp & Dr. Colleen Robb*

Panelists: *A.B. Short, Co-founder, MedShare (Atlanta)*

Mary Luft, Founder & CEO, Tigertail Productions

This lively panel with three successful social entrepreneurs will help keep you aware of opportunities and will consider how you actively seek opportunities and daily practices that result in the discovery of opportunity. It will explore whether opportunities exist or do they need to be created.

Featured Presentation

Entrepreneurial Finance: Leveraging the 501 Status

Robert Hacker, CFO, One Laptop Per Child

Entrepreneurial finance is primarily related to leveraging resources, understanding the business model in numbers, and making accurate financial projections. Some basic concepts and tools will be reviewed and applied to the nonprofit model. Undertaking new projects or strategies in a nonprofit requires an intimate understanding of the finances involved and when considered from a social entrepreneurship standpoint, several opportunities present themselves. Using One Laptop Per Child as an example for discussion, the strategy of leveraging of 501(c)3 and 501(c)4 status will also be presented and explored.

Robert H. Hacker is a business strategist, financial consultant, author, college professor, and blogger. He manages GH Capital. He has an extensive background as an international finance executive and strategy consultant.

Unwinding

Networking Reception

PHILANTHROPY MIAMI TOOLKITS

Stimulation for Your Brain

TUESDAY, MARCH 20, 2012 | 8:30 A.M. - 5:00 P.M.

JUNGLE ISLAND | 1111 PARROT JUNGLE TRAIL, MIAMI

8:30 – 9:00 a.m.

Registration and Breakfast

9:00 – 10:00 a.m. Keynote

Opening Remarks & Introduction

Claudia Grillo, SVP, United Way of Miami-Dade

Glenn Kaufhold, President and Founder, GKollaborative

Breakfast Keynote Speaker

Steve Rothschild, The NON Nonprofit: For-Profit Thinking for Nonprofit Success (Minneapolis)

10:00 – 11:00 a.m.

Toolkits: Session I (Select from one of the following concurrent sessions)

A. TOP 10 TIPS FOR FUNDRAISING SUCCESS

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

Munisha Underhill, Senior Director, Advancement, Adrienne Arsht Center

10 tips that every fundraiser can use and implement immediately to improve their work.

Ranging from prospecting, the ask, stewardship, admin, etc... Best practices

B. COLLABORATION

Panelists: *Lillian Tamayo, CEO, Planned Parenthood of South Florida and the Treasure Coast;*

Silvia Kubina, Director, The Bass Museum

Suzanna Valdez, Adrienne Arsht Center

Participants will learn about the importance of collaboration as a means to increase your impact and increase your funding. As a panel presentation, the audience will hear first hand accounts of successful and unsuccessful collaborative efforts.

C. CAREER TRACK

Linda Steckley, Senior Major Gifts Officer, The Chautauqua Foundation (Chautauqua, NY)

Ever take a second to look at your career and figure out what it all means and where is it heading? We hear a lot about what good fundraisers do to raise money, but what about the things they do to be good professionals. This session will focus on you, the fundraiser, for a change, and discuss professional development in the development field.

FOR MORE INFORMATION ABOUT PHILANTHROPY MIAMI OR LEAVE A LEGACY:

Please contact Edwina Lau, Chase Marketing Group, at 305.379.0800 or elau@chasemiami.com.

11:00 a.m. – Noon

Toolkits: Session II (Select from one of the following concurrent sessions)

A. MEASURING YOUR WORK

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.

B. PROSPECT RESEARCH

Julie Maspons, Director of Advancement Research, University of Miami

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.

C. ANATOMY OF A MAJOR GIFT

Sergio M. Gonzalez, Senior Vice President for University Advancement and External Affairs, University of Miami

This session will demystify the process of identifying, cultivating, soliciting and closing major gift prospects.

Noon – 1:30 p.m. Lunch

Philanthropist's Panel:

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George Lindemann, Chair, Board of Trustees, Bass Museum of Art

1:45 – 3:30 p.m. Double Session

STORYTELLING: Telling your story could be the difference between a "Yes" and "No"

Shuya Ohno, Assistant Communications Director, National Immigration Forum (Washington, DC)

All of our causes have a compelling story to tell, but what about your own story? Have you ever used your own personal story as a fundraiser to mobilize others into action? Tell your story in a compelling way and you will raise more money. We will teach you tactics to tell your story in a way that mobilizes people to give their time and money for your cause.

FOCUS: A new way to look at new media

New Organizing Institute (Washington, DC) (invited)

Participants will learn how to use and measure the use of new media (website, facebook, twitter, blogs, texting, etc.) in their annual giving and gift campaign strategies.

3:30 – 5:00 p.m.

PHILANTHROPY MIAMI

Registration Form

Please select the days you would like to attend:

\$150 Leadership Forum - February 16, 2012 • Akerman Senterfitt
Half-day session for board leadership and senior leaders to explore concepts of social entrepreneurship and how they relate to the day-to-day work of non-profits. (Includes lunch and reception) Special Bonus: Sign up by February 3rd and get one complimentary admission to PHILANTHROPY MIAMI.

PHILANTHROPY MIAMI - March 20, 2012 • Jungle Island

\$150 Toolkits

An engaging series of workshops on an array of topics, compelling keynote speakers and networking opportunities with your peers. (Includes breakfast, lunch & networking reception)

Please select one Toolkit to attend for each Session:

SESSION I: Top 10 Tips
 Collaboration
 Career Track

SESSION II: Measuring Your Work
 Prospect Research
 Anatomy of a Major Gift

\$100 Fundraising Basics

An intensive introduction to fundraising for professionals new to the field. (Includes breakfast, lunch & networking reception)

Please complete a separate registration form for each person attending.

Name _____

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 forms along with payment to Chase Marketing Group, 799 Brickell Plaza, Suite 707, Miami, Florida 33131. For more information, please contact 305.379.0800 or elau@chasemiami.com