

FRIDAY, MARCH 21 & WEDNESDAY, APRIL 16, 2014

PHILANTHROPY MIAMI 2014

SYNERGY: New Directions, Creative Partnerships



LEAVE A LEGACY®

**Friday,
March 21**

TRACK 1:

Day of Strategic Thinking: Strategies

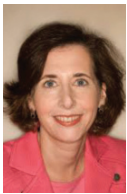
**A Day of Sharing and Strategies to Build Partnerships,
Increase National Funding and Enhance Impact**

Jungle Island | 1111 Parrot Jungle Trail | 8:00 a.m. - 5:00 p.m.

**8:00 a.m. Registration & Breakfast
SHARK TANK Voting Begins**

8:15 - 9:15 a.m. Welcome Roundtables

Share breakfast with a local leader, make new friends and contacts.



9:15 - 9:45 a.m. Top 10 Challenges Facing Nonprofits Today

*Introduction: **Matt Haggman**, Miami Program Director, Knight Foundation*

*Keynote: **Stacey Palmer**, Editor, Chronicle of Philanthropy*

Consider the forces, ideas, and changes that will set the stage for giving in the years to come by looking at influential trends shaping philanthropy, non-profits, and the communities they serve.

9:45 - 10:45 a.m. Sector Breakouts: Strategic Analysis

Join sector leaders to analyze Strengths, Weaknesses, Opportunities and Threats (SWOT) impacting South Florida nonprofits in your industry.

Arts & Culture

***Laura Bruney**, President, Arts & Business Council*

***Deborah Margol**, Deputy Director, Miami-Dade County Department of Cultural Affairs*

Human Services

***Claudia Grillo**, Chief Operating Officer, United Way of Miami-Dade*

***David Suarez**, Lead Facilitator, Interactive Training Solutions, LLC*

Health and Wellness

***Steve Marcus**, President, Health Foundation of South Florida*

***Marlene Marcos**, Facilitator, Interactive Training Solutions, LLC*

Education

***Matt Forman**, Director, Himan Brown Charitable Trust*

***Nicole Kaufman-Glasglow**, Senior Director of Corporate & Foundation Relations,
Florida International University*

***Linda Lecht**, President and CEO, The Education Fund*

Economic and Community Development

***Josh Gelfman**, Deputy Director, Miami-Dade County Department of Regulatory and
Economic Resources*

***Robin Reiter**, President, Reiter and Associates*

***Ralph Rosado**, Executive Director, South Florida Community Development Coalition*

11:00 a.m. - 12:00 p.m. Today's Trends: Ideas for Increased Impact

Sectors will reconvene to develop strategies that will opportunities and create synergies.

12:30 - 12:35 p.m. **Collective Impact is Key to a Brighter Future**

Charles Auslander, President and CEO, The Children's Trust

Discover case study examples of how collaborations focused on children and families create more impact for a greater, Greater Miami.



12:35 - 1:30 p.m. **Big Leadership: How to Ensure the Impact You Want**

Keynote: **Rosabeth Moss Kanter**, Professor at Harvard Business School, co-founder/Chair/Director of Harvard University's Advanced Leadership Initiative, a best-selling author and global advisor

Drawing from business, community, and public service, Ms. Kanter will define new imperatives for leaders who want to have significant impact on important problems in challenging times of change.

1:30 - 2:30 p.m. **An Internal View: Mobilizing Your Board and Staff**

Convenor: **Matt Haggman**, Miami Program Director, Knight Foundation; with **Sergio Gonzalez**, Senior Vice President for University Advancement and External Affairs, University of Miami and **Aaron Podhurst**, Chairman, Perez Art Museum Miami (PAMM)
Learn strategies and tactics to most effectively build a strong, committed and engaged board of volunteer leaders.

2:45 p.m. **SHARK TANK Voting Ends**

2:45 - 3:40 p.m. **An External View: Building Successful Partnerships**

Convenor: **Terrie Temkin, Ph.D.**, Founding Principal, CoreStrategies for Nonprofits; with **Deborah Plutzik Briggs**, Vice President for Marketing and Philanthropy, The Betsy-South Beach and **Jennifer Gibbs**, Senior Vice President, Development, Patricia and Phillip Frost Museum of Science

Explore how the power of partnerships that generate synergy are able to create greater community impact.

3:45 - 4:30 p.m. **Writing Winning Grant Proposals: What Fundraising Professionals Need to Know**

Charisse Grant, Senior Vice President, Programs, The Miami Foundation; **Penny Shaffer**, Market President, South Florida, Florida Blue; and **Bentonne Snay**, President and CEO, The Snay Group, Inc.

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



4:30 - 5:00 p.m. **Final Remarks and SHARK TANK Voting Results Announced**

Steven L Schwartz, Director of Estate and Planned Giving, Florida International University

The top five finalists will be announced. Each finalist team will be paired with a leading community mentor to discuss the idea and prepare their presentations to the panel of SHARKS at the end of the April 16th program!

**Friday,
March 21**

TRACK 2:

Day of Strategic Thinking: Fundraising Basics
An Indepth Overview to the Fundraising World

Jungle Island | 1111 Parrot Jungle Trail | 8:00 a.m. - 5:00 p.m.

8:00 a.m. **Registration & Breakfast**
SHARK TANK Voting Begins

8:30 - 9:15 a.m. **Welcome Roundtables**

Share breakfast with a local leader, make new friends and contacts.



9:15 - 9:45 a.m. **Top 10 Challenges Facing Nonprofits Today**

Introduction: **Matt Haggman**, Miami Program Director, Knight Foundation

Keynote: **Stacey Palmer**, Editor, Chronicle of Philanthropy

Consider the forces, ideas, and changes that will set the stage for giving in the years to come by looking at influential trends shaping philanthropy, non-profits, and the communities they serve.

9:45 - 10:45 a.m. **Fundraising Success Secrets**

David Halpern, Exceptional Organizations and **Michael Hughes**, Director of Development, The Patricia & Phillip Frost Art Museum, Florida International University

An open dialogue sharing tricks of the trade to become more efficient, courageous, communicative and successful.

11:00 a.m. - 12:00 p.m. **Explore the Basics: Understanding the Development Cycle**

Doris K. Sipos, MA CFRE, Principal, Philanthropic Development Solutions, LLC

Whether you need the basics of fundraising or a refresher in development fundamentals, here's "everything you need to know" about the fundraising process.

12:30 - 12:35 p.m. **Collective Impact is Key to a Brighter Future**

Charles Auslander, President and CEO, The Children's Trust

Engaging a community on behalf of children and families to create more impact for a greater, Greater Miami.



12:35 - 1:30 p.m. **Big Leadership: How to Ensure the Impact You Want**

Keynote: **Rosabeth Moss Kanter**, Professor at Harvard Business School, co-founder/Chair/Director of Harvard University's Advanced Leadership Initiative, a best-selling author and global advisor

Drawing from business, community, and public service, Ms. Kanter will define new imperatives for leaders who want to have significant impact on important problems in challenging times of change.

1:30 – 2:30 p.m. **Special Events, Friend-Raising and Cultivation**

Christine Brown, *Manager of Advancement Services, Adrienne Arsht Center and Tracey Wiseman*, *Managing Partner, Partner2Impact, LLC*

Special events are often a first point of contact with potential donors. Learn how to build your events to engage and cultivate supporters.

2:45 – 3:40 p.m. **Building a Revenue Stream Through Annual Giving, Major Gifts and Planned Giving Strategies**

Steven Schwartz, *Director of Estate and Planned Giving, Florida International University* and **Dania Gorriz**, *Vice President, Major Gifts, United Way of Miami-Dade*

Explore techniques to cultivate annual donors, develop relationships that lead to major gifts and discuss stewardship models for planned giving.

3:45 - 4:30 p.m. **Writing Winning Grant Proposals: What Fundraising Professionals Need to Know**

Charisse Grant, *Senior Vice President, Programs, The Miami Foundation*; **Penny Shaffer**, *Market President, South Florida, Florida Blue*; and **Bentonne Snay**, *President and CEO, The Snay Group, Inc.*

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



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SHARK TANK Voting Results Announced

Steven L Schwartz, *Director of Estate and Planned Giving, Florida International University*

The top five finalists will be announced. Each finalist team will be paired with a leading community mentor to discuss the idea and prepare their presentations to the panel of SHARKS at the end of the April 16th program!

**FOR MORE INFORMATION ABOUT PHILANTHROPY MIAMI 2014
OR SHARK TANK:**

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

**Wednesday,
April 16**

DAY OF DYNAMIC IDEAS

A day of learning, ideas and creativity

Jungle Island | 1111 Parrot Jungle Trail | 11:30 a.m. - 5:00 p.m.

11:30 a.m. – 12:00 p.m. **Registration and Lunch**

12:00 – 1:00 p.m. **Synergies and Strategies to Impact Our Community**

Dean Isaac Prilleltensky, *School of Education and Human Development, University of Miami*

Sector leaders from our March 21st Sessions will report on key strategies and discuss how these actions can impact our community.

Arts & Culture

Human Services

Health and Wellness

Education

Economic and Community Development



1:00 – 2:00 p.m. **Case Study: A Successful Community Collaboration**

Keynote Speaker: Sherry Magill, President, Jessie Ball duPont Fund, Jacksonville, Florida

The Jessie Ball duPont Fund is renovating a former library to become the Jessie Ball duPont Center, a shared working space for area nonprofit organizations.

2:15 – 3:30 p.m. **What's Your Challenge? Ask an Expert**

Local experts will lead table discussions to address relevant topics. Table topics will include:

- Are Events Worth the Effort?
- Why Have Gift Acceptance Policies?
- Turning Prospects Into Donors
- Through the High Wealth Donor's Lens
- Building Corporate Sponsorships
- Tricks of the Social Media Trade
- The Search for Great Board Members
- Deepening Relationships with Foundations
- Why Good Financial Management Matters
- New Models for Funding
- Partnerships for Community Outcomes
- How to Prepare for the New IRS

3:45 - 4:45 p.m. **SHARK TANK: New Ideas for Strategic Partnerships**

Host: David Halpern, *Exceptional Organizations*

SHARKS:

George Foyo, *EVP Baptist Health South Florida*

Harve Mogul, *President & CEO, United Way of Miami-Dade*

Teresa V-F Weintraub, *President & CEO, Fiduciary Trust International of the South*

Alina Hudak, *Deputy Mayor, Miami-Dade County*

Sheldon Anderson, *Chair, The Beacon Council*



**PHILANTHROPY MIAMI
SHARK TANK**

Five Shark Tank finalists will pitch their collaborative ideas and discuss the outcome for the community. The Sharks will select the "best pitch" and present the Grand Prize of \$5,000 as seed money to launch the new idea.

PHILANTHROPY MIAMI Registration Form

\$195 PRE-PAID FULL CONFERENCE PACKAGE (TWO DAYS) - BEST VALUE! (Registration at the door - \$225)

Day of Strategic Thinking - March 21, 2014 • Jungle Island • 8:00 a.m. - 5:00 p.m.

PLEASE SELECT A TRACK:

- Strategies** - Experience a day of sharing, analysis, trends and strategies for potential partnerships, enhanced impact and increased national funding
- Fundraising Basics** - A full-day intensive introduction to fundraising for professionals new to the field.

Day of Dynamic Ideas - April 16, 2014 • Jungle Island • 11:30 a.m. - 5:00 p.m.

Building on the strategies identified on Day 1 (March 21st), participate in small group discussions led by local experts on specific topics.

SINGLE DAY OPTIONS

\$150 Day of Strategic Thinking: Strategies - March 21, 2014

\$150 Day of Strategic Thinking: Fundraising Basics - March 21, 2014

\$ 75 Day of Dynamic Ideas - April 16, 2014

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

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The Patricia & Phillip Frost Art Museum

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PHILANTHROPY MIAMI 2014

**POWER-PACKED PROGRAM...
YOU CAN'T MISS THIS!**