

Planet Philanthropy 2004

Strategies for a Changing World

September 19-21, 2004

Presented by the Florida Caucus
of the Association of Fundraising Professionals



Shaping the Legacies of the Future

September 22, 2004

Presented by the Florida Association of Planned Giving Councils
Both Programs Generously Sponsored by
Wachovia Bank, N.A., Charitable Services Group



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**Adam's Mark Hotel
Jacksonville, Florida**



www.planetphilanthropy.org

Planet Philanthropy 2004 & Shaping the Legacies of the Future

Conference Schedule at a Glance

Planet Philanthropy 2004

Sponsored by Wachovia Bank, N.A.,
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**Saturday,
September 18**

8:00 a.m. - 5:00 p.m.Chapter Leadership Workshop
Presented by AFP Chapter Services

**Sunday,
September 19**

12:30 - 6:00 p.m.Conference Registration
4:30 - 7:30 p.m.Exhibition Hall open
6:00 - 7:30 p.m.Opening Reception
7:30 p.m.Dinner (on your own)

**Monday,
September 20**

7:00 a.m. - 6:00 p.m.Exhibition Hall open
7:00 a.m. - 2:30 p.m.Conference Registration
7:00 a.m. - 9:00 a.m.Continental Breakfast
8:00 a.m. - 5:30 p.m.CFRE Review Course*
8:00 a.m. - 5:30 p.m.First Course in Fundraising*
9:00 - 10:15 a.m.Educational Sessions
10:15 - 10:45 a.m.Morning Break
10:45 a.m. - noonEducational Sessions
12:15 - 1:45 p.m.Plenary Luncheon/Keynote Speaker: John Spence
2:15 - 3:30 p.m.Educational Sessions
3:30 - 4:00 p.m.Afternoon Break
4:00 - 5:15 p.m.Educational Sessions
5:30 p.m.Dinner on your own or Special Dinner Cruise (additional cost)

**Tuesday,
September 21**

7:00 a.m. - 6:00 p.m.Exhibition Hall open
7:00 a.m. - 2:30 p.m.Conference Registration
7:00 a.m. - 9:00 a.m.Continental Breakfast
8:00 a.m. - 5:30 p.m.CFRE Review Course* (continued)
8:00 a.m. - 5:30 p.m.First Course in Fundraising* (continued)
9:00 - 10:15 a.m.Educational Sessions
10:15 - 10:45 a.m.Morning Break
10:45 a.m. - noonEducational Sessions
12:15 - 1:45 p.m.Plenary Luncheon/Keynote Speaker: Adrienne Finley
2:15 - 3:30 p.m.Educational Sessions
3:30 - 4:00 p.m.Afternoon Break
4:00 - 5:15 p.m.Educational Sessions
5:30 p.m.Conference Concludes

Shaping the Legacies of the Future

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**Wednesday,
September 22**

8:30 - 9:00 a.m.Registration and Continental Breakfast
9:00 - 10:15 a.m.Welcome and Educational Sessions
10:15 - 10:30 a.m.Morning Break
10:30 - 11:30 a.m.Educational Sessions
11:30 a.m. - 1:00 p.m.Luncheon/Keynote Speaker: Gregory W. Baker
1:00 - 2:00 p.m.Educational Sessions
2:00 - 2:15 p.m.Afternoon Break
2:15 - 3:15 p.m.Educational Session

CFRE Examination

**Wednesday,
September 22**

8:00 - 9:00 a.m.Check-in
9:00 a.m. - 1:00 p.m.Examination

*Participation in the First Course and Survey Course precludes attending other sessions.

Education Sponsor: The Blue Foundation for a Healthy Florida

Strategies for a Changing World

Should your next fundraising letter be one or two pages — or should you send a letter at all? What's the future of corporate giving in the days of downsizing and consolidation? Where will we find the next generation of volunteers? And what's up with those wacky CRUTs and CRATs?

You'll find the answers to these and countless other timely questions at Planet Philanthropy 2004, the bigger-and-better-than-ever edition of the biennial statewide conference organized by the Florida Caucus of the Association of Fundraising Professionals. Once again, the conference offers something for everyone — from the newest members of our profession to those seasoned veterans we all seek out for their wisdom and advice.

After traveling the state from St. Petersburg Beach to Orlando to Fort Lauderdale, we're pleased to take a turn in Jacksonville, where our AFP First Coast Chapter colleagues have planned a grand old time — including a Jaguars game. Popular returning features include an AFP Chapter Leadership Workshop, the CFRE exam — and a full-day conference for gift-planning professionals presented by the Florida Association of Planned Giving Councils.

Don't waste a minute! The Early-Bird registration deadline is August 31.

Conference Highlights

Keynote Speaker: John Spence • Monday, September 20 "Excellence by Design"



John Spence is a leading authority in strategic planning, high-performance teams, leadership development, advanced interpersonal communications, consultative sales and life management skills. The author of **Excellence by Design: Leadership**, he has delivered workshops, speeches and consulting to more than 280 organizations worldwide. He serves as "Executive in Residence" for the University of Central Florida's Technology Incubator and as an adjunct professor for the University of North Florida's Division of Continuing Education. John has also served on the Board of Directors for the University of Florida's Center for Entrepreneurship & Innovation.

Keynote Speaker: Adrienne Finley • Tuesday, September 21 "Major or Mega, the Formula's the Same in Fundraising"



Every nonprofit organization could be forgiven a bit of envy when it was announced that The Salvation Army had received a gift of more than \$1.5 billion from the estate of Joan B. Kroc, widow of McDonald's founder Ray Kroc. Adrienne Finley, development director for The Salvation Army in San Diego, will offer insight into the building of the relationship that led to a \$92-million gift from Mrs. Kroc in 1998 and the remarkable bequest earlier this year. A second-generation southern Californian, Adrienne is a graduate of San Diego State University. She worked for the Zoological Society of San Diego before joining The Salvation Army in 1992.

Jacksonville Princess Dinner Cruise

Join us for a sunset dinner cruise along the beautiful St. Johns River Monday, September 20, from 7 to 9 p.m. The Jacksonville Princess is a delightful way to enjoy panoramic views of unspoiled wildlife and the Jacksonville downtown skyline and waterfront. You'll even get a look at Alltel Stadium, home of Super Bowl XXXIX. The 90-foot, two-deck luxury yacht will pick us up at the hotel. You won't want to miss this two-hour cruise with 75 of your AFP friends and colleagues. The cost is \$55 per person and includes dinner and dessert. A cash bar will be available. Reserve your seat now!

Conference Headquarters: Adam's Mark Hotel

Just 18 miles from Jacksonville International Airport and a short hop from I-95, the Adam's Mark Jacksonville (soon to be a Marriott) occupies a scenic spot on the St. Johns River. It features spacious guest rooms, a rooftop pool and whirlpool and fully equipped fitness center. It's adjacent to the Jacksonville Landing entertainment and shopping area and close to all the city's major attractions. For reservations, call (904) 633-9095.

Host Chapter: AFP First Coast Chapter

Special Golf Outing at World Golf Village on Sunday, September 19. Call Glenn Tappan at (904) 308-7306 for details.

Track I (Eight Sessions) – Major and Capital Gifts

Track Sponsor: MaGIC Inc.

Dean: Paul K. D'Alessandro, President & CEO, Harvest Development Inc.

Stewardship is More than a Box of Chocolates – Joy K. Hallinan, Senior Consultant, Alexander Haas Martin & Partners Inc.

“What to Ask?” “How to Ask?” Putting Together a “Winning” Proposal – Rodney M. Grabowski, CFRE, Assistant Vice President for Development, University of North Florida

The Role of Donor Screening in Identifying Major Gift Prospects – Susan Heileman, Vice President, MaGIC Inc. (Major Gifts Identification/Consulting Inc.)

The Importance of the Major Gift Professional in the Overall Structure of Successful Development Programs – James Steven Hill, Vice President for Development, Embry-Riddle Aeronautical University

Researching Donors Prior to Cultivation and Solicitation – Pat Ramsey, Assistant Vice President for Development, Embry-Riddle Aeronautical University

Skills of the Major Gifts Officer: What it Takes to be Successful – Henry Maly, President, Maly and Company

Defining Major Gifts and 10 Things You Don't Want To Do On a Major Gift Call – Paul D'Alessandro, President and CEO, Harvest Development Inc.

The Importance of the Major Gifts in Capital Campaigns and Your Overall Development Program – Terry A. Fairholm, President and CEO, Advancement Partners Inc.

Track II (Eight Sessions) – Master Track

Track Sponsor: Designs in Development

Dean: Peggy J. Calhoun, ACFRE, Senior Principal, Miller, Calhoun & Company

Reality after 9-11: Emerging Trends, Two Years Later – John D. McIlquham, Publisher, The NonProfit Times

Current Trends in Recruiting for Nonprofits – Daniel J. Burns, Attorney, Director of Executive Search, Campbell & Company

Why Sarbanes-Oxley Matters to Your Organization – Phil M. DiComo, Attorney, Edwards & Angell, LLP

Developing a Board of Strategic Thinkers and Goal Achievers – Terrie Temkin, Ph.D., President, NonProfit Management Solutions Inc.

Capturing Women's Wealth, Power and Influence – Margaret May Damen, CFP, ChFC, President and Founder, The Institute for Women and Wealth

Tips and Techniques for Successful Gift Negotiation – Pierre N. Allaire, Ph.D., Vice President for Institutional Advancement and Executive Director, University of North Florida Foundation

“Yes, No, Maybe” – An Interactive Workshop for Ethical Decision Makers – J. Lloyd Horton, FAHP, CFRE, AFP Ethics Committee

Managing Computerized Screening for Maximum Results – Charles A. Headley, Vice President, Prospect Information Network

Track III (Seven Sessions) – The Annual Fund

Dean: Karen McGlone, Orlando Regional Healthcare Foundation Inc.

Anatomy of an Employee Campaign: Raising Money Within the Family – John Bozard, President, Orlando Regional Healthcare Foundation; Averitt Ennis, Director of Development, Orlando Regional Healthcare Foundation

Donor Recognition: Its Role in the Annual Fund – Paul Dyer, Metal Décor

The Annual Fund: Putting all the Pieces Together – Robert Townes IV, Senior Vice President, Sinclair Townes and Associates

Special Event Fundraising – Tom Micelotta, Regional Director, North Florida Special Olympics

Donor Stewardship: Key Ingredient to Success – Devin Mathias, Director of Annual Giving, University of Florida

Getting 100% Involvement from Your Board in the Annual Fund – Jonathan M. Polisar, CFRE, The Polisar Group Inc.

Team Building: Mounting a Successful Annual Fund – John P. Capurso, Principal, Capurso Consulting, and Andrew Sanderbeck, Professional Development Speaker, Trainer and Consultant

Track IV (Four Sessions) – The Small Shop

Track Sponsor: Eisenhart and Associates

Dean: Kent Ryan, Executive Director, Memorial Health System Foundation

Board Members' Roles and Responsibilities – Linda Eisenhart, MA Ed, CFRE, Eisenhart & Associates Inc.

E-Technology on a Shoestring Budget! – Wayne Robbins, Senior Account Executive, E-Tapestry

Prioritizing Fundraising Activities in a Small Shop – Jane Jordan, Executive Director, Community Hospice Foundation

Planned Giving in a Fundraising World: Turning Donors into Philanthropists – Mark Brewer, President and CEO, Community Foundation of Central Florida

Track V (Four Sessions) – Special Events

**Dean: Susan Terry, President and CEO,
Community AIDS Network**

**The Feng Shui of Special Events: Creating Energy
for Bigger Bucks** – Cheryl Stock, President and
CEO, C. Stock & Associates

**Creating a Team That Works for Special Event
Success** – Aundria R. Shootes, Director of
Development and Public Relations, All Faiths Food
Bank

Special Events: The Package – Ken Sons,
Development Director, Children First

**The Circular Effect – Evolving Your Attendees into
Life-Long Donors** – Linda J. Greaves, Manager of
Partnerships, Sarasota County Government

Track VI (Four Sessions) – Marketing

Track Sponsor: Conover-Kirkwood, LLC

**Dean: Kathy Ellis, Program Manager, Rollins
College Philanthropy and Nonprofit Leadership
Center**

**Part I: How Market Research Influences Overall
Institutional Advancement** – Robert B. Kovacevich,
Principal, Avatar Company

**Part II: How Market Research Influences Overall
Institutional Advancement** – Robert B. Kovacevich,
Principal, Avatar Company

Applying Marketing Techniques in Fundraising –
Jana Ertrachter, Strategic Marketing Specialist

**“We Ought to Be in Pictures” – How to Make an
Effective Fundraising Video** – Terri Chastain, CFRE,
Director of Annual Giving, United Cerebral Palsy
Child Development Center, and Ed Bookbinder,
President, Visual Impact Communications Inc.

Track VII (Two Sessions) – A New Era of Development

Dean: Linda McAllister, CFRE, Bayshore Solutions
E-Mail Marketing for Effective Fundraising –
Kevin V. Hourigan, President and CEO, Bayshore
Solutions

**Introspective Funding: Inside the Mind of a
Corporate Foundation** – Susan B. Towler, V.P.
Community Relations, Blue Cross & Blue Shield of
Florida Inc., and Executive Director, The Blue
Foundation for a Healthy Florida Inc.

Track VIII (Three Sessions) – Career Advancement

**Dean: Linda L. Bartimus, CFRE, Director of Fund
Development, Flagler Health Care Foundation**

Alphabet Soup: “Decoding the CFRE” – Scott C.
Staub, ACFRE, Vice President of Fund Development,
EMQ Children and Family Services

Advancing Your Career with an ACFRE – Scott C.
Staub, ACFRE, Vice President of Fund Development,
EMQ Children and Family Services

Career Management Strategy – Cal Douglas,
FAHP, CFRE, Founder/Owner Cal Douglas Executive
Search Inc.

AFP First Course in Fundraising

Two complete days of “basic training” for new
fundraising professionals (precludes attending
other sessions)

**Dean: Robb Resler, CFRE, Director of
Advancement, Shorecrest Preparatory School**

Welcome and Introductions – Robb Resler, CFRE

**Introduction to Fundraising and the
Development Professional** – Robb Resler, CFRE

Planning for Successful Fundraising – David T.
Shufflebarger, CFRE, Senior Vice President,
Alexander, Haas, Martin & Partners

Integrated Development Programs – Suzanne
Horstman, FAHP, Executive Director, Library
Foundation of Martin County

Annual Giving – Penelope Welch, CFRE, Director of
Development, St. Anthony’s Healthcare Foundation

Securing Major Gifts – Joanne Rock, CFRE, Director
of Advancement, Academy at the Lakes

Obtaining Grant Support – Suzanne Eastridge,
CFRE, Director of Grants and Programs, University
Area Community Development Corporation Inc.

Board Members, CEOs and Other Volunteers –
Lois Miller, CFRE, Executive Director, Sun Coast
Hospital Foundation

Managing Development Office Operations – Dan
Gura, CFRE, Vice President of Development and
University Relations - The University of Tampa

CFRE Survey Course

Two full days of instruction for professionals with
five or more years of experience (precludes
attending other sessions)

**Dean: Lisa M. Hicks, CFRE, Planned Giving Officer,
Orlando Regional Healthcare Foundation Inc.**

Introductions and History of Philanthropy

Laying the Foundation for Fundraising

Defining an Integrated Development Program

Making the Case

**Volunteers and Staff Roles, Responsibilities and
Relationships**

**Identifying, Involving and Retaining Current and
Prospective Donors**

Annual Giving and Fundraising Methods

Planned Giving

Capital Giving

Speakers to be announced

Schedule subject to change

*Conference brochure produced by
The Rubin Communications Group, Boca Raton*

Shaping the Legacies of the Future

Florida Association of Planned Giving Councils • September 22

Sponsored by Wachovia Bank, N.A., Charitable Services Group

Education Sponsor: The Blue Foundation for a Healthy Florida



Featured Speaker:

Debra Ashton, Author of *The Complete Guide to Planned Giving*

Luncheon/Keynote Presentation

Current Developments in Planned Giving – Gregory W. Baker, Renaissance, Inc.

Sessions in Basic Planned Giving Techniques

Planned Giving 101 – Debra Ashton, Ashton Associates

Creating a Bequest Program in 60 Days – Debra Ashton, Ashton Associates

Charitable Gift Annuities – Robin Ganzert, Ph.D., Wachovia National Center for Planned Giving

Technical Sessions for Experienced Gift Planners

Charitable Gifts of Retirement Plan Assets – Gregory W. Baker, Renaissance, Inc.

Funding Charitable Gifts with Unique Assets – Harold Melser, SIUE Foundation

Life Insurance Schemes, Scams and Plans – Debra Ashton, Ashton Associates

Concluding Session

Ethics in Planned Giving: Case Studies – J. Lloyd Horton, CFRE, FAHP, Horton & Associates

FAPGC Planning Committee

Sheryl P. Bordelon, CFP, MSFS

M. Elaine Hall, CFP

Bert Livingston

Christine Isham

Andrea D. Mears

Richard Alan Lehrman, Esq.

Richard H. Johnson, J.D.

Suzanne R. Horstman, FAHP

Peter Palin

Steven Benson

For additional information, contact Sheryl Bordelon or Elaine Hall at (904) 730-7433, sbordelon@capanjax.com or ehall@capanjax.com.

Professional Advancement

Additional Professional Advancement Opportunities

Chapter Leadership Workshop September 18 • 8:00 a.m. - 5:00 p.m.

AFP members who are currently in leadership positions with their chapter, or individuals who have an interest in future leadership positions, are invited to attend a FREE workshop held just prior to the opening of Planet Philanthropy. The workshop will include continental breakfast and lunch at the workshop and a "networking" dinner hosted by AFP on Saturday evening. Learn about the international association, resources available to chapters, as well as leadership and board development. Separate registration for the workshop is required; deadline for registering is September 1. If you have questions, please contact Peg Bergeron, Manager, Chapter Services, at 1-800-666-3863 ext. 452, or e-mail: mbergeron@afpnet.org.

CFRE Examination September 22 • 9:00 a.m.- 1:00 p.m.

The Certified Fund Raising Executive (CFRE) Examination is designed as a practice-based exam for fundraising professionals to demonstrate mastery of the six core knowledge areas. The exam tests knowledge and skills you use on-the-job. You can get an application by sending an e-mail to info@cfre.org or calling (703) 370-5555. Applications must be postmarked by July 22, 2004.

Conference Registration

Name _____
Nickname for Badge (if desired) _____
AFP Member # _____
 ACFRE CFRE FAHP (Check if applicable)
Title/Position _____
Organization/Company _____
Address _____
City, State, Zip _____
Phone _____ Fax _____
E-mail _____
(for registration confirmation)
AFP Chapter/Planned Giving Council Affiliation(s) _____

Please make checks payable to "AFP State Conference" and mail to:

Ms. Carol B. Baumer, CFRE
Vision Is Priceless Council
1820 Barrs Street, Suite 546
Jacksonville, FL 32204

Registration Fees:

Full Conference Registration \$225 (Member Early-Bird – postmarked by 8/31/04)
(9/19 - 21) \$275 (Non-member Early-Bird – postmarked by 8/31/04)
 \$275 (Member – after 9/1/04)
 \$325 (Non-member – after 9/1/04)

Single-Day Registration \$200 (Member)
Circle one: 9/20 or 9/21 \$225 (Non-member)

First Course¹ \$375 (Member – includes registration)
(9/20 - 21) \$425 (Non-member – includes registration)

CFRE Review Course¹ \$425 (Member – includes registration)
(9/20 - 21) \$475 (Non-member – includes registration)

Planned Giving Day \$125 (Member² and registrants at full AFP Conference)
(9/22) \$150 (Non-member)

Jacksonville Princess Cruise \$55 per person x _____
(9/20)

Total Registration Fee: _____

¹Sorry, no Early-Bird discounts on First Course or CFRE Review Course

²Qualifying for Member Rate: AFP Members, Florida Planned Giving Council Members

You may complete a registration form online at www.planetphilanthropy.org and then send your check – or use this form and mail it with your check. Registration forms must be accompanied by check! No registrations by phone or fax, please. However, you may contact Carol B. Baumer with registration questions at (904) 308-2020 or via e-mail at carol@visionispriceless.org.

Full AFP Conference, CFRE Review Course and First Course registrations include breaks, opening reception, two luncheons, and conference handouts. There will be a \$25 surcharge for on-site registration.

Planned Giving Day registration includes continental breakfast, lunch, breaks and conference handouts.

Refunds are available up to September 1, 2004, and are subject to a \$50 administrative fee.

For more information, contact Conference Co-Chairs Glenn Tappan, CFRE, at gtappan@stvincentshealth.com or (904) 308-7306, or Suzanne Horstman, FAHP, at horstman@adelphia.net or (772) 221-1409.

For hotel reservations, contact the Adam's Mark Jacksonville at (904) 633-9095. The special AFP conference room rate is \$109 per night, plus all applicable taxes. Parking is available at a rate of \$8 per day (self-parking) or \$12 per day (valet). (Note: The hotel is expected to become a Marriott prior to the conference.)

Register Today for these Outstanding Professional Development Opportunities!

September 19-21, 2004 • September 22, 2004

Adam's Mark Hotel, Jacksonville, Florida • www.planetphilanthropy.org



Planet Philanthropy 2004 PLUS Shaping the Legacies of the Future

Presented by the Florida Caucus of the
Association of Fundraising Professionals and the
Florida Association of Planned Giving Councils

Conference Sponsors and Underwriters*



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The Blue Foundation for a Healthy Florida
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Exhibitors*

AFP Chapter Services
Ashton Associates
DonorPerfect/Software Inc.
eTapestry
Felten & Associates
MaGIC Inc.
Metal Décor
Renaissance Inc.

*(as of 6/11/04)

Planet Philanthropy 2004 Planning Committee

Suzanne R. Horstman, FAHP, Co-Chair
Glenn A. Tappan, CFRE, Co-Chair
Steve Bardy
Carol B. Baumer, CFRE
Linda L. Bartimus, CFRE
Sheryl Bordelon
Gary Brewer
Linda Eisenhart, CFRE
Gary Good

John P. Capurso
Rodney M. Grabowski, CFRE
M. Elaine Hall
Tricia Jenkins, CFRE
Leon M. Rubin
Susan Terry, CFRE

Barton Clarke Tryon, CFRE, Florida Caucus
Chair

Note: The conference hotel is currently the Adam's Mark, but is scheduled to be rebranded as a Marriott Hotel.



Florida Caucus

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