

# PLANET PHILANTHROPY 2008

ALL-FLORIDA BIENNIAL STATE CONFERENCE

June 8-10, 2008

*Make plans now to attend our  
"Out of This World" 3-day conference*

**Hyatt Regency Sarasota  
Sarasota, Florida**

**June 8, 9 & 10, 2008**



**Presented by  
the Florida Caucus  
of the Association  
of Fundraising Professionals**

**[www.PlanetPhilanthropy.org](http://www.PlanetPhilanthropy.org)**



2008

# Welcome to all Participants!

Dear Participants,

Welcome to Planet Philanthropy 2008. The Suncoast and Southwest Florida Chapters of AFP are proud to be hosting the conference with the AFP Florida Caucus. From the committee's very first meeting last March, it has been our goal to plan a fabulous conference that would provide to you the motivating speakers on engaging topics and well-planned educational tracks, and hold it at a location where you would want to attend.

The surveys that were sent out last spring and answered by so many of you, gave us a guideline to begin the planning process. We have planned a terrific educational program as well as networking opportunities. Knowing how important it is to keep abreast of the latest and greatest trends in fundraising, our exhibitor's hall and vendor track sessions promise to keep you up-to-date on the latest technology, services, and products available. The importance of meeting and sharing ideas with other professionals along with the opportunity to enhance our own education is combined together in this conference.

## Don't miss it!

### Registration

Sunday, June 8th  
3-6pm—Hyatt Sarasota

### Opening Reception

Sunday, June 8th  
6pm—Hyatt Sarasota

Opening Reception  
Sponsored by  
**Schultz &  
Williams**

And who could ask for a better location? We invite you to eat at any of the wonderful restaurants in Sarasota, shop in the little boutiques, take a stroll along the Bay, or just sit by the pool for a little relaxation. We hope you will take time to relax and enjoy this wonderful location, and absorb much of what will be learned from the sessions.

Throughout this year, we have worked with a wonderful group of volunteers from our local chapters as well as from across the state to bring you this conference. It could not have been accomplished without their hard work, time and dedication to improving our profession. Thank you and enjoy the conference!

Best regards,

Jody Huebert-Hamm, CFRE, AFP Southwest  
Melody Marrs, CFRE, AFP Suncoast  
Conference Co-Chairs

Sponsored by  
**Bank of  
America**

## Monday June 9: Luncheon Keynote Speaker—Abigail E. Disney

President-Daphne Foundation

**Abigail is the grand niece of Walt Disney, the granddaughter of Roy Disney and is the Founder and President of the Daphne Foundation, a progressive, social change foundation that makes grants to grassroots, community-based organizations working with low-income communities in New York City.**

**She recently retired as Chair of The New York Women's Foundation, of which she was a board member for over 14 years. Abigail serves on the boards of the Roy Disney Family Foundation, the White House Project, the Global Fund for Women, and the Fund for the City of New York, as well as the advisory boards of a broad range of organizations working in the areas of poverty, women's issues, education and environment. And, when *Ms. Magazine* was in danger of extinction, she worked with Gloria Steinem to form Liberty Media for Women to secure the future of *Ms. Magazine* for future generations.**

**Abigail received her Bachelors degree from Yale University, her Masters degree from Stanford University, and her Doctorate from Columbia University. While pursuing her Ph.D., Abigail taught English and American Literature at Iona College. She and her husband, Pierre Hauser, live in New York with their four children, one dog, three cats, a fish, a guinea pig and an immortal turtle named Alfred.**

# Practical Knowledge ❖ Professional Growth

✓ *Mark your calendar* and send in your registration today for the sixth biennial statewide conference organized by the Florida Caucus of the Association of Fundraising Professionals. Your dedicated colleagues from across the state have been hard at work planning an information-packed and inspirational program featuring distinguished speakers from Florida and beyond. Whether you're a newcomer to the profession or a seasoned veteran, you'll find something just for you at *Planet Philanthropy 2008*.

This year's AFP conference will feature several different topics designed to immerse you and your fellow professionals in topics that are critically important to your success such as:

- ❖ Advanced Gift Planning
- ❖ Board Development
- ❖ Donor Development
- ❖ The Fundraising Process
- ❖ Non-Profit Leadership and Management
- ❖ Public Relations

What is different this year is that that you can be as *flexible* as you want to be and roam from topic to topic to hear the speakers that are the most relevant to you! No more sticking to one track for the entire conference.

## Planet Philanthropy 2008 Track Levels

- ❖ *Basic*
- ❖ *Intermediate*
- ❖ *Advanced*

Highlighting the schedule on Monday and Tuesday, June 9 and 10, will be the Plenary Luncheons with Abigail Disney and Mark Brewer. In these two lively forums, two noted philanthropists will have an opportunity to share their philosophies of giving and entertain questions from the audience.

Don't waste a minute...the *FINAL* registration deadline is *May 15, 2008*—and you can register on-line! Visit [planetphilanthropy.org](http://planetphilanthropy.org) for details, or mail in the form included in this brochure. We look forward to seeing you in June for Planet Philanthropy 2008!

Sponsored by  
Univ. of Central  
Florida,  
Master's in  
Non-Profit  
Management

## Tuesday June 10: Luncheon Keynote Speaker—Mark Brewer

President & CEO-Community Foundation of Central Florida

**Join Mark Brewer for his stimulating and dynamic report on the surprisingly large impact philanthropy has on the Florida economy. Mark will take us on a tour of the many ways in which philanthropy and the non-profit sector contribute to the economic growth of Florida.**

**Mark is President and CEO of the Community Foundation of Central Florida, which builds community by building philanthropy. The foundation manages over 400 charitable funds and connects people with what they care about in the Central Florida regional community. Mark is a well-known national speaker on non-profit sector management and strategy, venture philanthropy, and the role of the non-profit sector in society.**

**DAY ONE**  
Monday, June 9, 2008

# Planet Philanthropy Educational Sessions

**TRACK**  
→  
**TIME**  
↓

	<b>DONOR DEVELOPMENT</b>	<b>THE FUNDRAISING PROCESS</b>	<b>PUBLIC RELATIONS</b>	<b>LEADERSHIP &amp; MANAGEMENT</b>	<b>ADVANCED GIFT PLANNING</b>	<b>BOARD DEVELOPMENT</b>	<b>SPONSORS/ EXHIBITORS</b>
8:00-8:30 8:30-9:00	<b>TABLE-TOP DISCUSSIONS AND BREAKFAST WITH THE EXHIBITORS</b>						
	<b>WELCOMING REMARKS</b>						
9:00-10:15	<b>After the Ball, Converting Event Guests into Annual Donors:</b> Suzanne Seiter, CFRE  Senior Consultant/ Schultz & Williams <b>Basic</b>	<b>Introduction to the Role of Fundraiser:</b> Greta Kishbaugh  Associate/ Schultz & Williams <b>Basic</b>	<b>The Brand Called You: DeWanda Smith-Soeder</b>  President/Smith-Soeder Enterprises <b>Basic</b>	<b>Involving Your Board in Fundraising:</b> Joanne Rock  Director of Advancement/ Academy at the Lakes <b>Intermediate</b>	<b>To Get Big Gifts, Think Like a Donor:</b> Wayne Olson  Vice President/ Trust Company of Virginia <b>Intermediate</b>	<b>Understanding Differing Behavioral &amp; Communication Styles:</b> Denise Federer, Ph. D.  Psychologist -Coach/ Federer Performance Management <b>Advanced</b>	
10:15-10:45	<b>BREAK WITH EXHIBITORS</b>						
10:45-12:00	<b>Effective Donor Stewardship for a Diverse Donor Base:</b> Kerry Bartlett, CFRE  Executive Director/ Indian River Community Found. <b>Intermediate</b>	<b>Annual Giving: Raising More Money for Less:</b> Jessica Harrington  Vice President/ Schultz & Williams <b>Basic</b>	<b>Media Training: Jan Luongo, APR</b>  President/ Alliance Communications <b>Basic</b>	<b>Developing and Retaining Talent:</b> Susan Galler  Galler Group <b>Advanced</b>	<b>How to Close the Really Big Ones:</b> Norman Olshansky  President/ NFP Consulting Resources <b>Advanced</b>	<b>Board Governance Orientation:</b> Christie Lewis  VP of Nonprofit Capacity Building/Community Foundation of Sarasota Cty <b>Basic</b>	
12:00-1:30	<b>Lunch &amp; Keynote Speaker – Abigail Disney</b>			<b>“Getting Mickey Off My Back: How Philanthropy Saved Me From Myself”</b>			
1:30-2:45	<b>Seasonal Donors: How do We Engage Them?</b> Nancy Turrell, CFRE  Executive Director/ The Arts Council <b>Intermediate</b>	<b>Prospect Research in the Small Shop:</b> Bart Tryon, CFRE & Julie Taylor, CFRE  Philanthropy Management, Inc. <b>Intermediate</b>	<b>Cause Related Marketing:</b> James Mueller  President/James Mueller & Associates <b>Advanced</b>	<b>Developing Board Leaders:</b> Terrie Temkin, Ph.D.  CoreStrategies for Nonprofits, Inc. <b>Intermediate</b>	<b>How to Land Your Biggest Gift Ever:</b> Peggy Calhoun, ACFRE  Senior Principal/ Miller, Calhoun & Co. <b>Intermediate</b>	<b>Getting the Best From Your Board:</b> Sherill K. Williams  President & CEO/ Prevent Blindness Ohio <b>Intermediate</b>	
2:45-3:15	<b>BREAK WITH EXHIBITORS</b>						
3:15-4:45	<b>Preparations for the CFRE Exam:</b> Lisa Intagliata, CFRE  Director of Development/ Sarasota Memorial Healthcare Foundation <b>Inter./Advanced</b>	<b>Maximizing Grants in Your Capital Campaign:</b> Karen Eber Davis  President/Karen Eber Davis Consulting <b>Advanced</b>	<b>LaLa Leadership: It’s Not a Fairy Tale:</b> Cheryl Stock  President & CEO/ C. Stock & Associates, Inc. <b>Intermediate</b>	<b>Getting the Most From Fundraising Efforts:</b> Norman Olshansky  President/ NFP Consulting Resources <b>Intermediate</b>	<b>Women’s Gift Planning Expectations:</b> Margaret Damen  President & Founder/ Institute for Women & Wealth <b>Advanced</b>	<b>Create a Dynamic Tension Between Your Board &amp; Staff:</b> Steve Higgins  Senior Vice President/ Ketchum <b>Intermediate</b>	
5:00-6:00	<b>NETWORKING AND MEETING WITH EXHIBITORS</b>						

**SPONSORS/EXHIBITORS SESSIONS**

## Planet Philanthropy 2008 Track Deans

**Donor Development:** Stephanie McLean, Sue Seiter, CFRE  
**The Fundraising Process:** Carol Butera-Dutton, CFRE  
**Public Relations:** Susie Bowie

**Nonprofit Leadership & Management:** John Capurso  
**Advanced Gift Planning:** Faith Pridmore, CFRE  
**Board Development:** Nina Berkheiser, CFRE

**DAY TWO**  
**Tuesday, June 10, 2008**

# Planet Philanthropy Educational Sessions

TRACK TIME	DONOR DEVELOPMENT	THE FUNDRAISING PROCESS	PUBLIC RELATIONS	NONPROFIT LEADERSHIP & MANAGEMENT	ADVANCED GIFT PLANNING	BOARD DEVELOPMENT	SPONSORS/ EXHIBITORS	
<b>TABLE-TOP DISCUSSIONS AND BREAKFAST WITH THE EXHIBITORS</b>								
9:00-10:15	When You Dance With Donors, Let Them Take the Lead: Alyce Lee Stansbury President/Stansbury Consulting <b>Intermediate</b>	Major Gift Fundraising From Soup to Nuts: Joanne Rock Director of Advancement/ Academy at the Lakes <b>Intermediate</b>	Integrated Communication: A Strategic Approach: Martha Wells VP for Communication/ Mote Marine Laboratory <b>Intermediate</b>	How to Lead a Women's Philanthropic Initiative: Faith Pridmore, CFRE Consultant/ Principal Financial Group Susan Olson Director of Philanthropy/ Sarasota Ballet <b>Intermediate</b>	Working With Non-Cash Gifts: John Elbare, CFP Principal/ Florida Philanthropic Advisors, LLC <b>Intermediate</b>	Turning Board Members into Fundraising Champions: Nina Berkheiser, CFRE Principal/ Your Nonprofit Advisor <b>Intermediate</b>	<b>SPONSORS/EXHIBITORS SESSIONS</b>	
<b>BREAK WITH EXHIBITORS</b>								
10:15-10:45	Donor Relations the Disney Way: Wayne Olson Vice President/ Trust Company of Virginia <b>Basic</b>	Making the Ask: Carol Butera-Dutton, Chief Development Officer Children First Linda Greaves Manager/Office of Community Involvement <b>Basic</b>	Events Spelled DOLLARS: Dee Zulauf, APR President/ FPRA, Central West Coast Chapter <b>Basic</b>	Authentic Leadership as a Catalyst for Large Gifts: Will Austin, ACFRE Director of Development/Shriners Hospitals for Children <b>Advanced</b>	Charitable Giving as Part of the Estate Plan: Richard Gans Attorney at Law/ Ferguson, Skipper <b>Intermediate</b>	Board Roles & Responsibilities: Myriam Springuel, M.A. President/ Springuel Consulting <b>Inter./Advanced</b>		
10:45-12:00								
12:00-1:30	<b>Lunch &amp; Keynote Speaker – Mark Brewer “The Impact of Philanthropy on Florida’s Economy”</b>							
1:30-2:45	Appropriate Use of Fundraising Auctions: Wade West American Fundraising Auctions	Building a Pipeline for Foundation Success: Sara Leonard, CFRE Dir. of Advancement/MOSI Kim Thornberg <b>Advanced</b>	How Strategic PR Planning Can Save Your Bacon: Grace Carlson Principal/Aspire Green Branding & Social Marketing <b>Basic/Intermed.</b>	Philosophy About Change: Ted Downing <b>Intermediate</b>	Connecting Donors With Their Hearts: Cynthia Touchton Sen. Investment Consult./ Robert W. Baird & Co. <b>Intermediate</b>	Charity on Trial: Doug White Independent Consultant <b>Advanced</b>		
2:45-3:15	<b>BREAK WITH EXHIBITORS</b>							
3:15-4:45	I Know All That...But How do I Really Get a Gift? Alexandra Brovey Senior Director of Gift Planning/ Stony Brook University <b>Basic</b>	Effective eMail, Marketing for Nonprofits: Dennis White Internet Mktg. Specialist Jessica Moats Mktg. Dir./Gravity Free <b>Basic</b>	Matching Consultants with Agency Marden David Paru Marden Paru & Assoc. <b>Basic</b>	Building Planned Gifts: A Blueprint Design Susan Olson Director of Philanthropy/ Sarasota Ballet <b>Basic</b>	Special Interest Groups: Is it Board Micromanagement or Something Else? Dr. Chrissie Budd, CFRE Consultant/Beyond Visions <b>Intermediate</b>			

**Please Note:** This matrix is presented with the understanding that it is subject to change. Questions regarding course offerings should be directed to: John Elbare at 813-949-2979 or jelbare@pgcoach.org.

# Hotel Registration

June 8-10, 2008

## Hyatt Regency Sarasota

1000 Boulevard of the Arts  
Sarasota, FL 34236

Reservations may be made by calling **1-800-233-1234** or **941-953-1234** and ask for the reservation desk. Registrants should state that they are with the **Association of Fundraising Professionals** or use code **AFPR**.

Registrants can also make reservations on-line by visiting [www.sarasota.hyatt.com](http://www.sarasota.hyatt.com) and enter **AFPR** as the group code.

The cut-off date is 5/15/08 or until the room block is full.  
Group Rates:

- \$149 Single/Double Occupancy
- \$159 Triple Occupancy
- \$169 Quadruple Occupancy



## Sunset Cruise on Beautiful Sarasota Bay

Monday June 9, 2008

**LeBarge Tropical Cruises**—*a short walk or taxi ride from the host hotel*

Live Music, Cash Bar, Dolphin Sightings

What better way to end a day than a breathtaking sunset? Enjoy this “island-style” event with live entertainment featuring popular local entertainers. There’s dancing, good food, and your favorite cold beverage! During this two-hour cruise, keep your eyes open for dolphins at play and see if you can catch the legendary “green flash” as the sun dips below the horizon.

*Optional ticketed event for conference participants and their guests.*

6:30 p.m. Arrival, 7:00 p.m. Departure

2 hour cruise, \$15 per person

Cruise is limited to the first 125 people to register.

To purchase tickets for this event, please **complete your registration form in this brochure** or register on-line at [www.PlanetPhilanthropy.org](http://www.PlanetPhilanthropy.org)

# Conference Registration

Name: \_\_\_\_\_  
Name for badge (first or nickname and last): \_\_\_\_\_  
AFP Chapter: \_\_\_\_\_  
Check if applicable:  ACFRE  CFRE  FAHP  Other \_\_\_\_\_  
Title/Position: \_\_\_\_\_  
Organization/Company: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ E-mail: \_\_\_\_\_

## Registration Fees

### Full AFP Conference Registration (June 8-10)

- \$275 Member Early-Bird \* ID # \_\_\_\_\_  
Prof. Assoc. Name (ie: AFP, FPRA) \_\_\_\_\_  
 \$325 Non-member Early-Bird \*  
 \$325 Member \*\* ID # \_\_\_\_\_  
Prof. Assoc. Name \_\_\_\_\_  
 \$375 Non-member \*\*

\*postmarked on or before April 15, 2008

\*\*postmarked *after* April 15, 2008

*Members of AFP, FPRA and Florida Planned Giving Councils are eligible for the "Member" rate.*

### Single Day Registration

- \$175 June 9, 2008  
 \$175 June 10, 2008  
 I will be attending the  
Opening Reception on  
Sunday, June 8th.

*Please check the appropriate  
box for your registration!*

### Sunset Cruise (optional) Monday June 9, 2008:

\$15 per person..... Number of tickets \_\_\_\_\_ for a total of \$ \_\_\_\_\_

*Tickets are limited so reservations will be taken on a first come-first served basis. You will receive confirmation of your tickets with your registration.*

Registration Fee: \$ \_\_\_\_\_

Cruise Ticket(s): \$ \_\_\_\_\_

Total Payment Amount: \$ \_\_\_\_\_

- ✓ Register online at [www.PlanetPhilanthropy.org](http://www.PlanetPhilanthropy.org).
- ✓ Mailed registration forms must be accompanied by check or paid with a credit card. Please make checks payable to "AFP Suncoast Chapter FL Caucus-State Conference" and mail to: **Planet Philanthropy • 9210 Dayflower Drive • Tampa, FL 33647**
- ✓ Credit Card Payments:  American Express  VISA  MasterCard  Discover  
Card Number: \_\_\_\_\_ Exp. Date: \_\_\_\_\_ Security Code \_\_\_\_\_  
(3 digits on back of card)
- Signature: \_\_\_\_\_ Name *(as it appears on card)* \_\_\_\_\_

Planet Philanthropy registration includes breakfasts, two lunches, breaks and conference handouts.

Check here if you require vegetarian meals.

- ❖ **There will be a \$50 charge for onsite registration**
- ❖ **Refunds are available up to May 8, 2008 and are subject to a \$50 administrative fee**
- ❖ **Registration is not complete until payment is made**
- ❖ **No registrations by phone or fax**
- ❖ **REGISTRATION DEADLINE IS MAY 15, 2008**
- ❖ **Scholarship recipients can register at the early-bird rate up to May 15, 2008**



### 2008 Conference Co-Chairs

Jody Huebert Hamm, CFRE—Southwest Florida Chapter  
Melody Marrs, CFRE—Suncoast Chapter

### 2008 Planet Philanthropy Conference Planning Committee

Nina Berkheiser, CFRE—Suncoast Chapter  
Laura Breeze, CFRE—Southwest Florida Chapter  
Chrissie Budd, Ph.D., CFRE—Southwest Florida Chapter  
John Capurso—Miami-Dade Chapter  
Diane Charette—Treasure Coast Chapter  
Jan Chester—Southwest Florida Chapter  
Linda Crofton—First Coast Chapter  
Sara Ducuennis—Ft Lauderdale Chapter  
John Elbare, MBA, CFP—Suncoast Chapter  
Cynthia Falardeau—Indian River Chapter  
Bonnie Flynn, CFRE—Arrendondo Chapter  
Terri Goldstein, CFRE—Suncoast Chapter  
Rod Grabowski, CFRE—First Coast Chapter  
Linda Greaves—Southwest Florida Chapter  
Lisa Intagliata, CFRE—Southwest Florida Chapter  
Bob James—Arrendondo Chapter  
Greta Kishbaugh—Suncoast Chapter  
Stacy Kostevicki—West Chapter  
Melisa Burtless—Southwest Florida Chapter  
Sara Leonard, CFRE—Suncoast Chapter  
Jay Lockaby—Southwest Florida Chapter  
Brandon McCray—First Coast Chapter  
Cal Miller—Palm Beach Chapter  
Jennifer Moss—Southwest Florida Chapter  
Joan Kemeny Paru, CFRE—Southwest Florida Chapter  
Ann Peabody—Southwest Florida Chapter  
Faith Pridmore, CFRE—Southwest Florida Chapter  
Rob Resler, CFRE—Suncoast Chapter  
Sue Seiter, CFRE—Southwest Florida Chapter  
Gary Smith, CFRE—Southwest Florida Chapter  
Susan Terry—Southwest Florida Chapter  
Jay Tobin, CFRE—Suncoast Chapter  
Brian Weiner—Southwest Florida Chapter  
Julie Wills, CFRE—Suncoast Chapter  
Millie Wood-Goldsby—Treasure Coast Chapter

**Register now to increase your knowledge in fundraising and benefit  
from these experienced professionals!**

**[www.PlanetPhilanthropy.org](http://www.PlanetPhilanthropy.org)**

### Corporate Sponsors\*

\*as of 4/8/08

Opening Reception  
Schultz & Williams  
Monday Luncheon Keynote  
Bank of America  
Tuesday Luncheon Keynote  
Univ. of Central Florida,  
Master's in Non-Profit  
Management

Advanced Gift Education Track  
One To One Group

The Fundraising Process Education Track  
GiftCounsel.com

Sponsor & Exhibitor Reception

AFP Suncoast Chapter and Goodwill Foundation

### Premium Exhibitors

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Crescendo Interactive  
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Miller, Calhoun & Company  
Metal Décor  
Qbase  
Recognition Art  
Recognition Awards Co.

For Sponsor and Exhibitor Information, please contact Greta Kishbaugh at (813) 766-8715/  
gretzikishbaugh@verizon.net or Sue Seiter, CFRE at (941) 932-3536/sseiter@schultzwilliams.com.



**Presented by  
the Florida Caucus  
of the Association  
of Fundraising Professionals  
[www.PlanetPhilanthropy.org](http://www.PlanetPhilanthropy.org)**