



## News & Notes



The Palm Beach County Chapter Quarterly Newsletter

Fall 2009

P. O. Box 18279 - West Palm Beach, FL - 33416-8279 - [www.afppbc.org](http://www.afppbc.org)

### National Philanthropy Day: November 18



The 24th Annual National Philanthropy Day Luncheon and Recognition Ceremony will be held at the Kravis Center on Wednesday, November 18, 2009. This year's honorees represent the very best of philanthropy in Palm Beach County.

Join us as we celebrate and recognize the daily contributions individuals and organizations give to advance the success of the non-profit sector.

These generous leaders are committed to the sustainability and success of programs that enrich the lives of so many in our community.

#### The 2009 Award Recipients:

**Outstanding Philanthropist – Yvonne S. Boice**

**Outstanding Volunteer Fundraiser – William Plum**

**Outstanding Philanthropic Corporation/Organization – The International Society of Palm Beach; Herme de Wyman Miro, Founder and President**

**Outstanding Philanthropic Corporate Foundation – Bank of America Foundation**

**Outstanding Philanthropic Private Foundation – Arthur I. and Sydelle Meyer Foundation**

**Outstanding Planned Giving/Legacy Honoree – Dora Bak**

Tiffany Kenney of WPBF – TV 25 will be on hand to recognize these generous community leaders who truly "Change the World with a Giving Heart" throughout Palm Beach County. For more information regarding sponsorship, table sales or ad program availability, please contact co-chairs Robi Journey at [rjurney@quantumhouse.org](mailto:rjurney@quantumhouse.org) or Dennis Stefanacci at [dstefanacc@aol.com](mailto:dstefanacc@aol.com)



NPJ Co-Chairs:  
Robi Journey & Dennis Stefanacci

#### Welcome New PBC AFP Members

**Jay Fleisher, Attorney at Law, Caron Shutan, VP of Development, Alzheimer's Community Care, Taryn Flint, Development Coordinator, Alzheimer's Community Care**



## PRESIDENT'S MESSAGE

Kathleen Emmett Filosa, CFRE

Summer has proven to be a busy and exciting time for the Palm Beach County Chapter of AFP. We've had a terrific line up of engaging speakers, multiple audio conferences, plus one outstanding Summer Social! A special thank you is extended to Stacey Dowdle, Amy Brand, Stanton Cadow, Cindy DeSilva and their committee members for keeping our calendars chalk full of all things AFP.

I'd like to extend a warm welcome to three new Board members. Sarah McKenzie joins us as Public Relations Chair. She is an active member of the Strategic Planning Committee and brings much media-related experience to our Board. Christine Mally joins us as Planet

Philanthropy 2010 Co-Chair. Stay tuned for more details on this conference to be hosted jointly with AFP's Broward Chapter next summer. Finally, Rob Anderson joins us as Website Chair. Rob is Co-Founder of local web development and database services company, Forte Interactive. To further their commitment to the non-profit sector, Forte Interactive has graciously agreed to revamp our website free of charge. Get ready to browse our new creation at [www.afppbc.org](http://www.afppbc.org) to be rolled out this fall.

As many of you know, our Chapter President-elect, Vicki Pugh, accepted the position of Vice President at Volusia Flagler Family YMCA. She and her family moved last month to begin their new adventures. I know you all will agree that this is tremendous loss for our Chapter...and for Palm beach County for that matter! Vicki has assumed a wide range of positions on our Board for many years and, for that, she deserves a BIG round of applause. I'm excited to announce that Lorie Stinson has agreed to step into this role. Lorie, too, has served our Chapter in a number of capacities throughout the years and I'm certain she will do an outstanding job as our Chapter President next year.

Speaking of leadership, the Chairman of AFP International's Board of Directors, Robbe Healey, MBA, NHA, ACFRE will address our Chapter during our September 17 luncheon. Ms. Healey will share with us what she is seeing across the country with respect to fundraising. I've had the privilege of hearing her speak on a number of occasions and can assure this is one luncheon not to be missed. Looking forward to seeing you there.!

## Palm Beach County AFP 2009 Board of Directors

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### Every Member Campaign

Susan Hutcheon

We're half way there! We have raised over \$3400 toward our chapter goal of \$6765. Many thanks, to the 50 members who have made a gift or a pledge to The Every Member Campaign. No gift or pledge is too small! **Please make your gift or pledge today!**



## Now Accepting 2-Year Membership Scholarship Application.

### Scholarship Benefits

- Cost of annual membership (\$250)
- Cost of lunches - 6 required (\$150)
- Chapter dues (\$50)

Please go to the AFP Website to download and application and send it in today.

## AFP Youth in Philanthropy Scholarship 2007 Winner Update

### *Andrea Ramos*

Andrea Ramos received the AFP Youth in Philanthropy Scholarship two years ago. Andrea is currently a Junior at the University of North Carolina at Chapel Hill and has continued giving her time as a volunteer to many causes. She has been on the Dance Marathon committee for two years in a Leadership position, raising funds to help sick children at the local hospital on the UNC campus, they raise over \$100,000 per year for the endeavor alone. Andrea has also been a part of a Women's group, called *Womentoring* where she has organized and facilitated many events for incoming freshman, and each student is assigned an adult as a mentor. She was selected to attend two *Leader-Shape* conferences this summer and she has taken up a new cause KIVA. The KIVA organization loans money to people to start small businesses in third world countries. She has also joined a group called the Community Empowerment Fund, where the students mentor and help homeless people and try and get them back on their feet. Many of these people are educated, professionals, but out of work, or other circumstances have caused them to be homeless.

AFP agrees that Andrea is an amazing young lady, who truly is a humanitarian. AFP is proud to have been able to help out Andrea and her family in realizing her dream of attending UNC Chapel Hill.

The AFP Youth in Philanthropy Scholarship is a cash award given to a high school senior who has demonstrated "Acts of Philanthropy" through outstanding charitable giving of time, talent and treasure.



Mary Lewis  
Scholarship Chair

## Palm Beach County Chapter Defines Mission, Vision and Values

Over the past several months, the chapter's committee chairs have been developing a strategic plan to respond to the needs of our membership. As part of the process, the strategic planning committee, along with the president and president-elect, refined the mission, vision, values and quality statement for the chapter after



Melanie Otero  
Strategic Planning Chair

collecting input from the board and members. The chapter's input was very consistent with AFP International's statements for mission, quality statement and values. Therefore, the committee opted to recommend adoption of these statements to be consistent with International. The vision statement is original to the PBC chapter.

**Mission:** To advance ethical and effective fundraising.

**Vision:** A highly visible, respected, diverse, and inclusive association of fundraising professionals that is sought out for the expertise of its members and its ability to effectively connect nonprofit professionals and the greater philanthropic community.

**Quality Statement:** AFP is committed to excellence in providing the highest quality services for our members and other constituents. We are responsive to their needs and strive to exceed expectations.

**Values:**

**Philanthropy:** The belief that ethical and effective fundraising are the cornerstones of philanthropy and that philanthropy changes the world.

**Inclusiveness:** Embracing diversity in the fundraising community, with a commitment to understanding and addressing the shared and unique needs of all members of that community.

**Excellence:** Providing the fundraising community with the highest quality of knowledge, research, advocacy, career support, news and information, strategic alliances, and related tools and insights to ensure a successful future.

**Integrity and Credibility:** Conducting business according to the highest ethical principles and serving as trustworthy stewards of our resources.

**Collaboration:** Recognizing that we can accomplish our purpose only with the strong support and partnership of other individuals, AFP chapters and other groups who share our vision.

**Service Responsiveness:** Understanding that our focus is on service to our members, our chapters, stakeholders and customers and that it is provided in a timely and thoughtful manner, open to new ideas, and exceeding expectations.

We will be posting a summary of the full strategic plan to the chapter's website, so please stay tuned!

## Exploring Structure, Strategy & Promotion of Your Organization



The Diversity Committee will host a professional workshop on October 13 at Old School Square in Delray Beach, 9:00 – 1:00 pm.

### Scheduled guest speakers include:

**Katharin Brink:** Nonprofits First – Topic: Board Governance and Leadership

**Melanie Otero:** Palm Healthcare Foundation – Topic: Strategic Planning “Building a Plan for Growth”

**Monte Lambert:** Forte Interactive, Inc. – Topic: Website Construction and Using Social Networking sites to “Get the Word Out” About Your Nonprofit Organization

This is a free event open to representatives from non-profits and other community organizations. For more information, contact Amy Brand, @ [amy.brand@bethesdahealthcare.com](mailto:amy.brand@bethesdahealthcare.com)



**Amy Brand**  
Diversity Chair

## Monthly Luncheon Programs:

### September 17, 2009 at the Kravis Center

**Roberta (Robbe) A. Healey, MBA, NHA, ACFRE and Chairman of AFP International’s Board of Directors** will present ‘Trends in Philanthropy’. Robbe has more than thirty years in non-profit organization management and development. She is Senior Member of Farr Healey Consulting LLC and has served numerous faith based organizations as Chief Development Officer including The Hickman in West Chester, Pennsylvania. Robbe was the 75th individual to achieve the ACFRE, Advanced Certified Fund Raising Executive credential and is an AFP Master Teacher. She earned the designation in 2000, the first year it was awarded and has been designated a Faculty Star by the Council for the Advancement and Support of Education (CASE).

### October 15, 2009 at the Boca Country Club:

Please join us as we hear from **Mr. Jerry F. Smith of JF Smith Group**. Jerry F. Smith, CFRE, Author, lecturer, teacher and fundraising consultant Jerry F. Smith founded the J.F. Smith Group in 1991. He will be presenting *Major on the Majors: Identifying Major Gift Prospects*. This session will focus on the major gift prospect. Attendees will learn all the appropriate steps in dealing with prospects, including building a prospect pool, compiling and managing prospect information effectively, prospect evaluation, and prospect communication.

### November 10, 2009 West Palm Beach Marriott

**Jay Fleisher, Esq.** will present on *Ethics in Today’s Fundraising Environment* to our chapter on in a joint educational program with the Planned Giving Council of Palm Beach County

Jay is a member of the Board of Directors of the Planned Giving Council of Palm Beach County; the Nonprofit Organizations Committee of the American Bar Association and its Governance Subcommittee; the Charitable Organizations and Planning Committee of the Florida Bar; and the Estate & Probate Law Continuing Legal Education Committee of the Palm Beach County Bar Association. Jay was also a part of the lobbying teams which succeeded in enactment of federal tax laws enabling charitable IRA rollovers and the reformation of defective charitable remainder trusts.

### December 17, 2009 at the Kravis Center

Excitingly, our AFP Chapter will be host to **Peter Panapento, from the Chronicle of Philanthropy**, our industry’s leading publication on the field of Philanthropy on Peter is the on-line Editor of *The Chronicle* and he has added the AFP Palm Beach County Chapter to his national speaking circuit to bring us all up to date on the field’s trends in Social Networking & Fundraising; how donors are making life-changing decisions about their giving today through collaborative and extensive social networks and the change agents that capitalize on representing them.

**Stacey A. Dowdle, Vice President – Programs AFP**

**Reminder:** It is your responsibility to keep your membership contact information updated with AFP International so that we can keep in touch with you on the local level. If you have changed organizations, moved, been promoted, received a new phone number, etc., please revise your information at AFP International by logging onto their website at [www.afpnet.org](http://www.afpnet.org). To access your listing, please click on “Login”, and then simply use your eight digit member # (printed on your card) as the username and then type in your last name as the password. If your contact information is incorrect, click on “Address Change” under the Green QuickLinks column and make your changes, then click submit. Should you have any questions, please contact our AFP Administrator, Carol Heuser at [afprsvp@gmail.com](mailto:afprsvp@gmail.com).

## PLANET PHILANTHROPY COMES TO PALM BEACH COUNTY

**Highlight your calendars!** The 7th biennial *Planet Philanthropy* will take place at the Boca Raton Resort and Club from June 20-22, 2010. The resort, eager to showcase their world-class facilities to such a prestigious professional gathering, has offered an unbeatable room rate of just \$119 - and that extends three days prior and after the conference dates.

The conference planning committee, co-chaired by Maggie Hightower (Jacksonville) and Christine Mally (Palm Beach County) has begun work on the various elements that combine to make this the leading professional development and networking event in Florida. Volunteers are still needed to assist in the key areas of program development, exhibitor and sponsor recruitment and the all important on-site logistics and social events. If you would like to be part of this exciting event, please email Christine Mally, [cmally@ffcdc.org](mailto:cmally@ffcdc.org) or call 561.702.4010.

## PBC AFP CELEBRATES 25 YEARS

The Chapter's annual Summer Social, organized this year by Cindy DeSilva, Vice President, Membership, was a great success! The event was held at Taverna Opa on Thursday, August 13th, where members enjoyed delicious hors d'oeuvres and drinks, along with fantastic raffle prizes of fine wines and elegant orchids. Also, big thanks to Lisa Archer and Sheri McCandless for all their hard work at the event!



Sarah McKenzie  
Public Relations Chair



Rob Anderson, Forte Interactive; Kathleen Filosa, Emmett & Co.



Lisa Archer, Habitat for Humanity; Sheri McCandless, A Better Copy Center



Stanton Cadow, Chairman,  
Mentoring & Audio Conferences

## Audio Conference Schedule

This year the chapter is offering 23 different opportunities to attend free audio conferences. The schedule of topics and dates for the balance of the year are show listed below. Sites are needed for October and November. One in South County and one in North County. All told the chapter will have offered 12 different topics, at different times and days of the weeks, in the north, middle and southern portions of the county. Special thanks go out to our new partners, United Way, FAU and the Community Foundation for Palm Beach and Martin Counties for hosting conferences, among others. Already over 100 members and guests have attended conferences.

Please check our web site monthly for new topics, audio conference sites and dates. Contact Stanton Cadow, Chairman, Mentoring & Audio Conferences at St. Vincent de Paul Regional Seminary (561) 732-4424, ext. 152 or [scadow@svdp.edu](mailto:scadow@svdp.edu).

### Creating A Successful Fund Raising Culture: 12 Tools for Motivating Your Board

**Date:** Tuesday, September 22<sup>nd</sup> Noon to 1:30 PM **Host:** United Way of Palm Beach County

**Presenter:** Carole V. Rylander, CFRE

Why are so many volunteers and staff members reluctant to participate in approaching prospects and donors? How can board chairs, development committee members, nonprofit CEOs and professional fundraising staff lead their board teams to own -- and even enjoy -- the essential and ultimately rewarding work of major gifts fundraising? In this practical train the trainer session, topics address the needs of nonprofit leaders who want to increase volunteer and staff participation in approaching and engaging prospects and donors.

United Way 2600 Quantum Blvd., Boynton Beach, Auditorium—seating limited to 75. RSVP to Daniella Coy, 561-732-4424, ext 162, or e-mail: [dcov@svdp.edu](mailto:dcov@svdp.edu). Feel free to bring your own lunch; soda and snack machines available.

### Forty Ways to Maximize Fundraising Through Your Website

**Date:** Wednesday, September 30th Noon to 1:30 PM **Host:** Gulfstream Goodwill Industries

**Presenter:** Allan Pressel

Your website has two strategic objectives -- first, to inform the website visitor about your organization and its mission, and more importantly, to garner support for your nonprofit. Learn how to plan and build a site which not only has a lot for the user to see, but a lot for the user to do as well. Consider the impact of a site that offers online donations, event tickets, membership dues, e-store purchases, affiliate marketing, even in-kind donations, planned gifts, investment donations and much more.

Gulfstream Goodwill Industries, 1715 Tiffany Drive East, West Palm Beach. Seating limited to 30. RSVP to Cal Miller, [cmiller@gulfstreamgoodwill.com](mailto:cmiller@gulfstreamgoodwill.com) or call 561.848-7200. Bring your own lunch if you like.

**Directions to Goodwill Industries:** Take 95 to 45<sup>th</sup> street and head east. Go past Congress and round the bend. On the right hand side you will see a long white building with Goodwill Industries on the side. After the building make your first right and then your first right again. You enter the parking lot from behind the building. Drive to the second entrance at the east side of the building.

## Check out the AFP WebSite for More Free Training: [www.afppbc.org](http://www.afppbc.org)

<b>October:</b>	Creating a Successful Fund Raising Culture: 12 Tools for Motivating Your Board
<b>November:</b>	How to Have a Conversation With Donors About Planned Giving
<b>December:</b>	Prospect Research: How to Use Philanthropy Data for the Most Effective Fundraising