



FORMERLY NSFRE

JULY 2005

PALM BEACH COUNTY CHAPTER

## Board Member Spotlight

*This month's "Board Member Spotlight" is on the AFP Palm Beach County Secretary of the Board of Directors. A job description of each board member's duties will be included in monthly issues of the "Review" in order to familiarize other members who would like to have the opportunity to serve on the board. Please review the job descriptions each month and consider serving on the board next year.*

### AFP SECRETARY JOB DESCRIPTION

- 1) Record the minutes of all meetings of the Board of Directors and the membership.
  - A. Mail or e-mail minutes of the Board meeting to board members within two weeks of meeting
  - B. Distribute minutes of the general membership meetings (i.e. annual meeting) to members directly or via newsletter within one month of meeting
- 2) Perform all duties incident to the office of Secretary, and such other duties as from time to time that may be assigned by the president or as directed by the board
- 3) Keep notebook of minutes and budget hand-out up to date and pass on to the next Secretary
- 4) Confirm dates of board meetings and any changes in location where the board meeting is held
  - A. Send letter confirming dates for the year
  - B. Call prior to each monthly meeting to confirm.



Your  
Picture  
Could Be  
Here

**Lorie Stinson** currently serves as the Secretary of the AFP Board.

## Summer Social

**Thursday, August 25 from 5:30 -7:30 PM at  
Ta-boó Restaurant on Worth Ave. in Palm Beach.**

**There will be two drink tickets for the  
wine tasting and hors d'oeuvres.**

**The cost is \$27 per person and if you bring a potential new  
MEMBER he or she gets in for free.**

**There will be door prizes and complimentary valet parking.**

**To make a reservation e-mail [HUDSONMP@Bellsouth.net](mailto:HUDSONMP@Bellsouth.net)  
or call 561-585-0895.**

# President's Message

## The Care and Feeding of Development Staff

Is there a scarcity of good fundraisers? A recent *New York Times* article indicates that the demand for professional fundraisers is far outpacing the supply. Anecdotal evidence seems to confirm this at the local level. We have seen an increase in job postings and more calls from firms seeking qualified candidates. Frequent turnover and the lack of experienced fundraisers to fill those openings is becoming a critical problem. One of the most interesting findings in the article was the reason people were leaving their jobs. The main reason was not compensation but dissatisfaction with their immediate supervisor. Development professionals are more inclined to stay in a team oriented workplace where there is constant communication and feedback from leadership. Easy enough to say, but everyone is so busy who has the time for teambuilding and meetings with staff? Leadership has to make the time if they want a successful fundraising operation. As Colette Murray, J.D., CFRE puts it "...the care and feeding of staff – particularly those on the front lines of the development effort – must become an extremely high priority."

### Don't Lose It!!

We cannot afford to lose it – the deductions for non-cash or "in-kind" charitable contributions. The Senate Finance Committee is developing new legislation that would eliminate these deductions which could affect everything from real estate and art, to food, books, and household items. The legislation would also include other regulatory burdens such as:

- A federal accreditation program for charities (we would pay fees and dues)
- Form 990 filing fees
- Restrictions on the size of boards
- A requirement that charities submit extensive information to the IRS every five years justifying their tax exemption.

In response to these changes AFP International is forming a coalition with other charitable organizations to oppose these changes. Log on to the AFP website [afpnet.org](http://afpnet.org) and go to the Public Policy tab. There is more information on these issues and a sample letter to send to your congressman.

### Observations

Summer used to be a time when charities could take a "breather" and catch up. Now it seems as though the only difference between winter and summer is the traffic and the length of time we wait for a table at a restaurant. We might as well enjoy those two benefits. Have a great summer!

Respectfully,

*Suzanne*

Suzanne P. Cabrera, CFRE

## NEW MEMBER

Jan Savarick, *Acting Corporate Director*  
Boca Raton Community Hospital Foundation



## Mark Your Calendars!!!

### 20<sup>TH</sup> ANNUAL PHILANTHROPY AWARDS LUNCHEON

TUESDAY, NOVEMBER 22

Ritz-Carlton

### *Have you submitted your nominations for Chapter Philanthropy Awards?*

Each year AFP Palm Beach County Chapter members recognize individuals and organizations in our community who have made a significant contribution through time, talent and treasure to help local non-profit organizations.

- ☆ OUTSTANDING PHILANTHROPIST
- ☆ OUTSTANDING VOLUNTEER FUNDRAISER
- ☆ OUTSTANDING PHILANTHROPIC ORGANIZATION
- ☆ OUTSTANDING PHILANTHROPIC FOUNDATION

The deadline to submit nomination forms is AUGUST 12, 2005. Nomination forms are available at [afppbc.org](http://afppbc.org) or may be requested by sending an e-mail to Stanton Collemer at [scollemer@phfpbc.org](mailto:scollemer@phfpbc.org).

## MONTHLY MEETING NOTICE

JULY 21, 2005

**SPEAKER:** Ernestine Bean, *Director of Corporate Giving*  
Morton Plant Mease Foundation

**SUBJECT:** "Women in Philanthropy" (Diversity)

*Come learn the best ways to target, research, cultivate, solicit and steward women donors for your organizations. She will also provide helpful information on Generations X and Y.*

The Governor's Club

Noon Buffet Luncheon

11:30 a.m. Networking • 12:00 Program

*Fax or e-mail your RSVP to:*

Stacey Guzas • Phone (561) 241-9233

E-mail: [sguzas@renaissanceinstitute.net](mailto:sguzas@renaissanceinstitute.net) by Fri., July 15, 2005

### Member Registration

Name \_\_\_\_\_

Organization \_\_\_\_\_

Phone \_\_\_\_\_

### Guest Registration

Name \_\_\_\_\_

Organization \_\_\_\_\_

Phone \_\_\_\_\_

Are you an AFP member?  Yes  No

If no, would you like membership information?  Yes  No

## **The Association of Fundraising Professionals, Palm Beach County Chapter**

*Cordially invites you to a South County Event*

**SUBJECT: *Planned Giving***

**FORMAT: *Luncheon with Speaker***

**SPEAKER: Greg Schupra, Vice President of Comerica Bank and Group Director  
of their Charitable Services Group**

***An opportunity to:*** *Hear from an expert with 24 years experience  
in charitable gift planning; ask questions  
and express your thoughts relative to the subject, and interact  
with other AFP members and interested parties.*

**Thursday, August 4<sup>th</sup>, 11:30 to 12 networking, 12 – 1 pm lunch.**

***Location:***

**BOCA COUNTRY CLUB  
17751 BOCA CLUB BOULEVARD  
BOCA RATON**

***Directions:*** From 95 traveling South, take the Congress Avenue exit and follow signs for Congress Avenue South; a left hand turn at the bottom of the grade. The Boca Country Club is on your right hand side approximately 1.2 miles south.

From I-95 traveling north, take the Yamato Road exit and head west. At Congress make a right, head north, and look for the Boca Country Club on your left AFTER crossing Clint Moore Road.

From Florida's Turnpike: Take the Glades Road exit, heading east on Glades Road for approximately one mile, make a left onto Powerline Road, head North approximately 2.7 miles then make a right onto Clint Moore Road, head east approximately 2.7 miles and then make a left onto Congress Avenue. The BCC will be on your left.

Valet parking will be provided complimentary.

***Cost:***

**\$23 members, \$30 non-members.**

**For more information, or to RSVP by July 28th please contact:**

**Michael Lichtenstein  
Atlantic Capital Management  
(561) 686-6844, cell: 789-1674  
mnl\_acm@hotmail.com**



## Palm Beach County Chapter Board of Directors

|  |  |
|--|--|
| <b>PRESIDENT</b><br><b>Suzanne Cabrera, CFRE</b><br>The Lord's Place, Inc.                                       | 561-494-0125 ext. 137<br>scabrera@thelordsplace.org    |
| <b>PRESIDENT-ELECT</b><br><b>Stanton F. Collemer</b><br>Palm Healthcare Foundation                               | 561-833-6333<br>scollemer@palmhealthcarefoundation.org |
| <b>SECRETARY</b><br><b>Lorie Stinson</b><br>South Florida Fair and Exposition                                    | 561-790-5245<br>lorie@southfloridafair.com             |
| <b>TREASURER</b><br><b>Rosanne Sanchez, CFRE</b><br>Alzheimers Community Care                                    | 561-683-2700<br>rsanchez@alzcare.org                   |
| <b>VICE-PRESIDENT— PROGRAMS</b><br><b>Marie A. Bloom Deckert, CFRE</b><br>Bascome Palmer Eye Institute           | 561-515-1527<br>mbloom@miami.edu                       |
| <b>VICE-PRESIDENT— MEMBERSHIP</b><br><b>Donna Ghioto</b><br>Success Marketing & Consulting                       | cell 561-602-3726<br>dghioto@adelphia.net              |
| <b>AFP FOUNDATION CHAIR</b><br><b>Leah Miles</b><br>Ballet Florida   | 561-659-1212 ext. 26<br>leahmiles@balletflorida.com    |
| <b>CHAPTER SERVICES CHAIR</b><br><b>Stacey A. Guzas</b><br>Renaissance Institute                                 | 561-241-7977<br>sguzas@renaissanceinstitute.net        |
| <b>MEMBER SOCIAL CHAIR</b><br><b>Margaret P. Hudson</b><br>At Home Safe Foundation                               | 561-433-0060<br>mhudson@tcphs.org                      |
| <b>FLORIDA CONFERENCE CHAIR</b><br><b>Joanne Towner, CFRE</b><br>Easter Seals Florida                            | 561-471-1688<br>jtowner@fl.easterseals.com             |
| <b>MENTORING CHAIR</b><br><b>Jan Rodusky</b><br>Palm Healthcare Foundation                                       | 561-833-6333<br>jrodusky@palmhealthcarefoundation.org  |
| <b>NORTH COUNTY LIAISON</b><br><b>Faith Popick</b>   | 561-964-9876<br>faithwp@bellsouth.net                  |
| <b>NPD CHAIR</b><br><b>Terry Lee Kaly</b><br>Harris Bank   | 561-366-4211<br>Terrylee.kaly@harrisbank.com           |
| <b>NEWSLETTER CHAIR</b><br><b>Sandy Thomas</b><br>KidSanctuary, Inc.   | 561-818-9251<br>thomasart@adelphia.net                 |
| <b>PUBLIC RELATIONS CHAIR</b><br><b>Suellen Mann, CFRE</b><br>Jupiter Medical Center Foundation                  | 561-745-5728<br>smann@jupitermed.com                   |
| <b>SPONSORSHIP CHAIR</b><br><b>Dianne Reeves</b><br>Florida Atlantic University, John D. McArthur Campus         | 561-799-8665<br>dreeves@fau.edu                        |
| <b>SCHOLARSHIP CHAIR</b><br><b>Kathleen Emmett, CFRE</b><br>Hospice Palm Beach County, Inc.                      | 561-273-2259<br>kemmett@hpbc.com                       |
| <b>WEBSITE CHAIR (JOB BANK)</b><br><b>Martie Henry</b><br>Balistreri Realty                                      | 561-886-3700<br>4FloridaHomes@bellsouth                |
| <b>GOVERNMENT RELATIONS</b><br><b>Suzanne Foley</b><br>Legal Aid Society of Palm Beach County                    | 561-655-8944 ext. 279<br>sfoley@legalaiddpbc.org       |
| <b>IMMEDIATE PAST PRESIDENT</b><br><b>Roxanne Jacobs, CFRE</b><br>Palm Beach Hab Center                          | 561-965-8500<br>rjacobs@pbhab.com                      |
| <b>SOUTH/NORTH COUNTY LIAISON</b><br><b>Michael Lichtenstein</b><br>Atlantic Capital Management of Florida, Inc. | 561-686-6844<br>mnl_acm@hotmail.com                    |

## Terrie On Nonprofits®

TODAY I AM A BOARD PRESIDENT. Help, Please!

July 2005

**Q:** Do you happen to have any information specific to the board president's duties, rights, and responsibilities? References would be equally appreciated.

**A:** Ah...one of my favorite topics. Long gone are the days of grooming people over a period of years to take on the presidency of a board. I've seen people come to one meeting, say something intelligent and be asked to become president. It's no wonder that some presidents have questions about their roles.

In short, the president has three basic responsibilities:

- To ensure that the board fulfills its responsibility to the community by effectively guiding the organization toward fulfillment of its mission and vision while at the same time protecting it by making the best decisions possible given the available data and considering such things as the financial, risk, image and manpower implications of the options they consider.
- To partner with the executive director to ensure that the day-to-day operational decisions are consistent with the policies set by the board.
- To serve as the liaison between the board and executive director, gathering and passing information between the two and making sure that any misunderstandings are cleared up immediately.

The president's specific duties are many. Among them:

- Visioning and developing action steps to reach his or her vision.
- Staying current on all issues relevant to the organization and its place in the community.
- Developing the meeting agendas – often in conjunction with the executive director – with a focus on substantive issues that impact mission and vision.
- Facilitating meetings according to the protocol set out in the bylaws (e.g., Robert's Rules of Order or Robert's Rules of Order).
- Encouraging everyone's input – especially that of those who would challenge the status quo.
- Keeping the meetings on track while being sensitive to interpersonal needs.
- Seeing that the board is knowledgeable about the mission, the community and its roles and responsibilities.
- Appointing committees to do the business of the board and the organization.

*continued on page 6*

# Visit the AFP website at [www.afppbc.org](http://www.afppbc.org) for current AFP Job Bank Listings

NOTE TO EMPLOYERS AND JOB SEEKERS: This column will continue to be published as a free service to our AFP members and member agencies. There is a nominal charge of \$25 per listing to non-AFP members and member agencies. Please contact Job Bank Chair and Board Member, Martie Henry at 561-886-3720 or e-mail her at [MartieHenry@4FloridaHomes.com](mailto:MartieHenry@4FloridaHomes.com). Text may be edited due to space constraints.

## GIFT OF LIFE BONE MARROW FOUNDATION

### *Director of Development*

The Gift of Life Bone Marrow Foundation facilitates transplants for patients around the world suffering from life-threatening illnesses by increasing the representation of Jewish people in the bone marrow donor pool. Started in 1991, it is today among the world's most efficient registries. They have recruited 150,000 marrow/stem cell donors and facilitated 1,000 transplants since its inception. Gift of Life expects to facilitate 100 transplants in 2005 alone.

The Director of Development will be the chief fundraiser responsible for leading and growing development programs. This will be an exciting opportunity for a seasoned and entrepreneurial fund raising executive to grow a program that incorporates major and planned giving, capital campaigns, and foundation and corporate relations. Expertise in major gift fund raising is essential. The ideal candidate will possess a minimum of 10 years fund raising experience. Professional experience in a health setting is desirable. For additional information visit [www.giftoflife.org](http://www.giftoflife.org)

### **Benefits**

Excellent Benefits Package

### **Qualifications:**

CFRE, at least 10 years experience managing a successful fund raising program

### **Application Information**

Resumes to search firm DRG, Inc: David Cheng or Lisa Futterman. E-mail: [lfutterman@drgnyc.com](mailto:lfutterman@drgnyc.com).  
[lfutterman@drgnyc.com](mailto:lfutterman@drgnyc.com)

## KRAVIS CENTER

### *Donor Relations Assistant*

Donor Relations Assistant – FT – assist in all aspects of donor services w/emphasis on ticketing. Ideal candidate must have strong customer service, interpersonal & organizational skills, as well as be detail oriented & a self-starter. Must be computer literate. The Kravis Center offers full benefits, including retirement plan. Interested candidates should send/e-mail resume to Kravis Center, HR Dept., 701 Okeechobee Blvd., W.P.B., FL 33401- [viggiano@kravis.org](mailto:viggiano@kravis.org). NO PHONE CALLS DFW/EOE  
[viggiano@kravis.org](mailto:viggiano@kravis.org)

## AMERICAN HEART ASSOCIATION PALM BEACH/TREASURE COAST

### *Executive Director*

Executive Director, American Heart Association, Palm Beach/Treasure Coast. 5-10 years fund raising experience preferably with Gala and/or Walk events. Responsible for \$3.8 Million dollar campaign and supervision of 20+ staff.

### **Contact:**

Nick Buchholz  
2300 Centrepark West Dr.  
West Palm Beach FL 33409  
561-615-3888.

## AMERICAN HEART ASSOCIATION - FLORIDA/PUERTO RICO AFFILIATE

### *Heart Walk Director - Treasure Coast*

The AHA seeks a motivated, sales-driven, relationship builder to lead its Heart Walk efforts on the Treasure Coast. The successful candidate will be experienced with business to business sales presentations, have excellent oral and written communication skills, be enthusiastic and a proven closer. The Director will be based out of the Stuart Office but will need to travel to WPB 1 or 2 days a week. Will primarily cover the Treasure Coast but will have accounts in the North end of Palm Beach County as well. Fund raising goal is approximately \$300,000, will be part of a team that has a goal of \$1 million. Must be detail oriented, have the ability to work evenings, some weekends, occasion travel overnight, and able to lift 20-30lbs. Bachelor's degree or equivalent related experience. Exc. Benefits; Non smoker. EOE. Submit resumes with salary to HR Staffing Rep., P.O. Box 42150, St. Petersburg, FL 33742-4150 or e-mail.

Visit <http://www.americanheart.org> for other positions throughout the state. No phone calls please.

[FPASTaffing@heart.org](mailto:FPASTaffing@heart.org)

**FIRST STEP OF SARASOTA, INC.**

*Vice President of Development*

First Step of Sarasota, Inc., a C.A.R.F. accredited comprehensive center for alcohol and drug rehabilitation established in 1967, is seeking a Director of Development to implement an ambitious fund raising program as a means of decreasing dependence on fluctuating government grants and to increase private giving revenue as a percentage of the organization's \$7.5 million budget. First Step operates outpatient and residential treatment facilities in Sarasota, Manatee and DeSoto counties. The licensed professional/clinical staff assists approximately 3,000 individuals each year.

This position offers an excellent opportunity to run a comprehensive fund raising program that includes donor club programs, special events, direct mail and grants. Special consideration will be given to candidates who have a track record in acquiring first time donors and upgrading gifts from current donors. In addition, this position provides an opportunity to gain additional experience in capital and planned giving.

**Qualifications**

Bachelors degree with a minimum of five years of experience and a proven track record in annual giving. Some capital and planned giving experience is necessary as First Step is considering launching a capital campaign as well as a wills/bequest program. Ability to organize and work with a development council and manage a volunteer peer-driven fund raising program. Must have excellent written and oral communication skills, be a self-starter and be able to work with volunteers from diverse backgrounds. Active member of the Association of Fund Raising Professional and/or Association of Healthcare Philanthropy with a CFRE preferred but not necessary.

Salary is commensurate with experience and an excellent benefits package is included.

**Applications:**

Donovan Management, Inc is serving as fund raising counsel to First Step of Sarasota and is conducting this search. Please submit a cover letter and resume to [jflint@fsos.org](mailto:jflint@fsos.org) or mail to:

First Step of Sarasota, Inc.  
ATTN: DMI  
1970 Main Street - 5th Floor  
Sarasota, FL 34236

First Step of Sarasota, Inc. is an equal opportunity employer. [jflint@fsos.org](mailto:jflint@fsos.org)

- Sitting in on committee meetings as time permits.
- Delegating responsibilities to other board members or the executive director.
- Facilitating the evaluation of the executive director and board members according to clearly defined criteria.
- Providing frequent, specific and current feedback to both other board members and the executive director beyond the formal evaluation system.
- Serving as a role model in terms of attendance, meeting financial obligations, coming prepared to meetings, and so on.
- Having high expectations – even of other volunteers!
- Holding board members accountable to all stated expectations. This may require talking with people who are not following through on their commitments. It may also mean asking these individuals for their resignation if behaviors don't change.
- Ensuring that the board is self-sustaining – i.e., identifying, cultivating and training future leadership.
- Serving as an organization spokesperson.
- Signing contracts, checks and other documents.
- Guiding the development of policies.
- Accepting that the buck stops at his/her door.

For additional information you might want to check out *The Board Chair Handbook* by William and Linda Dietel, published by BoardSource in 2001, or *Dare to Chair: The Art of Chairing a Nonprofit Board of Directors* by Nancy Haycock published in 1991 by the Community Resource Exchange.

Terrie Temkin, Ph.D. is an internationally recognized governance and planning expert. She is president of NonProfit Management Solutions, Inc., a principal in CoreStrategies for Nonprofits, Inc., and a longtime member of AFP. Contact her at [terriet@nonprofitmanagementsolutions.com](mailto:terriet@nonprofitmanagementsolutions.com) 954-985-9489, or 866-985-9489.

**EDUCATIONAL OPPORTUNITIES**

AFP International offers a wide variety of educational opportunities. Go to the AFP International website to view course offerings, audio conferences, articles, statement papers and links to other sites.