

20th Annual Philanthropy Awards Luncheon Sold Out!



AFP honored to have Sheila Johnson as Keynote Speaker at this year's event...



Sheila Johnson, a noted Palm Beach and National philanthropist, equestrian enthusiast and co-founder of Black Entertainment Television (BET) will speak at the November 22nd event. Sheila is the founder and CEO of Salamander Hospitality and is currently building a luxury resort and spa outside of Middleburg, Virginia. Reinvesting wealth in the community over the years, she sits on the boards of Parson's School of Design, The Christopher Reeve Foundation, The National Campaign to Prevent Teen Pregnancy, The Jamestown Yorktown Foundation, and the United States Equestrian Federation. She is also President of the Washington International Horse Show.

and is also honored to have Dick Robinson as Master of Ceremonies...



Dick Robinson has successfully led fundraising campaigns for a long list of non-profit organizations on the local, national and international level. With his unique ability to recruit and motivate others to help, he has enabled many non-profit organizations to far exceed their fundraising goals. Dick and his wife Sally, who serves with him on events (as well as independently) make events fun for everyone involved.

Dick is President of Connecticut School of Broadcasting Robinson Media Group. He has given quality and free airtime publicity promoting many Palm Beach galas through his Standards by the Sea radio program which is broadcast on more than 600 stations worldwide. He received the Mental Health Association's first ever Margaret C. Connelly financial Development Award.

Agency Certification Initiative (ACI) Goals Revealed by ACI Director, Alexandria-Douglas-Bartolone

AFP appreciates Alexandria Douglas-Bartolone, ACI Director, for speaking to AFP members and guests at the Monthly Luncheon held October 20 at The Governor's Club.

Alexandria explained that the primary goal of the Agency Certification Initiative is to strengthen the administrative capacity of nonprofit agencies and promote best practices in nonprofit management. The plan is to achieve this by: *creating a unified set of administrative standards* for "certification" that nonprofits meet core requirements of

public and private funders; and *streamlining the administrative review process* to reduce the administrative burden on nonprofit agencies and funders.

An overview of the Certification Assessment Tools was included in the presentation and minimum standards required to be in compliance were discussed. Members learned that there are three levels of Nonprofit Agency Certification planned ranging from meeting **Mandatory** Minimum Standards, achieving **Best Practices** (exceeding minimum standards), or the highest level—becoming

(continued on page two)



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ACI (continued from page one)

certified for excellence in nonprofit management through **National Accreditation.**

According to Alexandria, the certification is a five-step process which basically involves:

- **Self Assessment** of Compliance with Certification Standards and Best Practices
- **On-site Review Process** (conducted by retired Nonprofit Agency Executives and business community representatives.)
- **Preliminary Certification Assessment Report** and the Agency's 10-Day Response Period
- **Organization Improvement Plans** (which may call for technical assistance, training or consultation) to help agencies achieve certification status over a six-eighteen month period.
- **Signed Authorization to Release Information & Agency Alerts to Funders**

She explained the role of the Executive Volunteer Corps—On-Site Review Teams which will be comprised of retired nonprofit agency executives, as well as Finance and Human Resource managers from the for profit sector. The all-volunteer teams will be screened for possible conflict of interest and agencies may also screen out up to two panelists for any other reason. Volunteers will maintain strict confidentiality and will not be allowed to retain documents from nonprofit agencies.

Several local funders are collaborating with the Agency Certification Initiative, an organization. This exciting movement toward excellence in nonprofits will begin in 2006 with 200 nonprofit organizations beginning the self-assessment process.

Many members were anxious to know how they could help their agencies get started in this quality improvement and accountability process. Step-by-Step Instructions for conducting self-assessments and other detailed instructions on CD Rom are available from ACI. For more information contact Alexandria Douglas-Bartolone, ACI Director, at 375-6629 or Ann M. Reinert, Project Coordinator, at 375-6651.

For those of you who were unable to be at the meeting and hear the full ACI presentation, there are advantages in store for agencies who meet the certification standards. Having a Certification stamp on your company letterhead will speak volumes for your agency's quality and accountability—and may make a difference in whether or not you receive funding from some grantors! Members, also note that as an extra incentive, nonprofits who achieve certification will be posted on the ACI website.

Thank you again Alexandria for sharing the Agency Certification Information with us. Individually and together we can all strive for excellence in the nonprofit sector.

Terrie On Nonprofits[®]

Are There Strings To What We Give Away at Events?

November 2005

Q: *We hold a fun-run and charge a \$25 registration fee (non-tax deductible) to enter the event. I have two questions. First, if a participant receives a t-shirt (\$8), a sports drink (\$1), and a certificate (\$0), is there a fair market value attached to these items, or can they be placed under the registration fee?*

Second, is there a threshold under which items which have minimal value such as certificates or lapel pins may be given without triggering the taxable-benefit issue?

A: Actually, you have three questions here, and they are all good ones since they are ones with which virtually every fund development professional has to grapple.

As I'm sure you are aware, fair market value is, in simple terms, the amount that someone would have to pay if s/he were to buy an item on the open market. Most things have a fair market value. In your example, the fair market value for the items you listed here are likely to be \$10 - \$15 for the T-shirt (depending on the quality), \$1 for the sports drink and nothing for the certificate. This is different from your cost, which is probably closer to the \$8 you mentioned for the shirt, \$.25 - \$.75 per bottle of sport drink and \$.10 - \$.15 per certificate. These numbers are needed if we are going to assign a donation amount to monies received from people, because the ultimate donation allowed by the IRS is the total amount paid minus the value of goods and services received.

The IRS does allow an organization to provide benefits of "insubstantial value" to donors without having to go through the hassle of providing written disclosure statements which specify the deductible portion of contributions. Insubstantial value is defined as having a fair market value not more than 2% of the amount of the payment received from the donor, up to a maximum of \$83 (adjusted each year for inflation). This means that your runners would have to make a donation of a minimum of \$450 in order to legally receive the \$9 worth of giveaways, unless your organization's name or logo is on each of these things and your aggregate cost is less than \$8.30. In that case, as long as someone makes a minimum payment of \$41.50 (again, this amount is adjusted annually) you may provide the items without worry.

Can you afford to offer the t-shirt, sports drink and certificate as part of your registration fee and still cover the other costs associated with putting on the fun run – those expenses for which you are charging the registration fee in the first place? If so, you don't have to worry about which portion is or isn't tax deductible since you've already indicated to the public that there is no donative element in their registration fee. By doing so you've in essence told the participants that they are paying for their goodies. In my mind, that's the cleanest way to go.

Best of luck on the run!

Thanks to Christine Manor, CPA, MBA for watching my back on this one.

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
954-985-9489 or 866-985-9489.

SPECIAL GUEST ALPHONCE J. BROWN, JR., ACFRE TO ATTEND AWARDS LUNCHEON



Alphonce J. Brown, Jr., ACFRE became the Vice President of Development of the National Academy of Public Administration in February 2005. The Academy is an independent, non-partisan organization chartered by Congress to assist federal, state and local governments in improving their effectiveness, efficiency and accountability. In this position, Mr. Brown is responsible for providing the leadership, direction and coordination for all fundraising strategies and activities that generate external philanthropic support for Academy programs and services.

Prior to this assignment, Mr. Brown was a consultant to U.S. and international non-profit organizations who thirst to learn more about how to incorporate best fundraising practices within its organization. Believing strongly in his obligation to share his more than twenty years of fundraising experience in health, education and volunteer service, Mr. Brown founded Docere Consulting, Inc. in July 2003 with the goal of providing service to traditional and non-traditional non-profit organizations wanting to learn more about fundraising. He was the principal in the company.

Until July 2003, Mr. Brown was vice president, University Advancement of California State University, Dominguez Hills in Carson, California. He joined the university in July 2000 and was responsible for overseeing all program activities related to external fundraising for the institution. In that role, he was responsible for the university's development or fundraising; local, state and national government relations; media relations; community affairs; publications and public relations and alumni relations. In this role, he also provided considerable expertise in the areas of strategic planning, annual giving, major donor cultivation and solicitation, marketing and system and process implementation. During his tenure, the university raised and reported more than \$14 million in three years.

During his career, Mr. Brown has worked for large, established organizations, as well as grassroots institutions—providing him with the breath of experiences needed to tailor services to client's wishes. His former employment includes serving as Executive Director of the National Kidney Foundation of Southeast Texas, President & CEO of the Prairie View A&M University Foundation and Assistant Dean of External Relations, College and Graduate School of Business, University of Texas at Austin. He has also worked as the territory or field representative for Baxter/Travenol, Kendall and the Southwestern companies.

Mr. Brown earned his Bachelor of Arts from The University of Texas at Austin. He received his Advanced Certified Fundraising Executive (ACFRE) designation in July 2002—a distinction held by only 75 senior fundraising professionals in the world. He is a frequent lecturer and teacher, and he has conducted workshops throughout the United States, Canada and Europe. He is an active member of the Association of Fundraising Professionals—a fundraising organization with a membership of 26,400. He has published a number of articles on fundraising and diversity. The media and press frequently engage him regarding his fundraising experience and expertise. Mr. Brown is currently the Vice President of Development of the National Academy of Public Administration. He is also Chair of the Association of Fundraising Professionals.

It you get a chance introduce yourself to Mr. Brown and let him know you appreciate his attendance.

Visit the AFP website at 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. Text may be edited due to space constraints. Jobs are listed in the newsletter and on the web site.

SOS CHILDREN'S VILLAGES-FLORIDA

Director of Development

Experienced fundraising professional invited to apply for full time position with this special children's charity entering its 13th year in Broward. Responsibilities include developing and executing annual campaign; and overseeing events, community outreach, endowment and planned giving. The Director of Development manages positions responsible for grantwriting, data entry and maintenance, and special events and public relations. Excellent interpersonal, writing, and speaking skills required.

Minimum requirements include a Bachelors Degree and five years experience in fund development. Competitive salary and benefits.

Submit letter and resume to bwitte@sosflorida.com.

bwitte@sosflorida.com

(LPBC) LEADERSHIP PALM BEACH COUNTY

Executive Director

LPBC ED Recruitment Info

Go to www.leadershippbc.org to download the Executive Director Recruitment Application and Qualifications Document. Please feel free to pass on the information to your friends and colleagues.

Position Announcement (posted 10/5/05): Executive Director, Leadership Palm Beach County

Leadership Palm Beach County (LPBC) is seeking a full time Executive Director. The organization is committed to identifying and uniting leaders from diverse backgrounds and perspectives to increase their understanding of countywide issues. This contractual position will be responsible for day to day operations and general management of the organization. This includes working closely with the LPBC Board of Directors; financial and administrative management; strategic planning including the implementation of the Alumni, Focus, Adult and Youth programs; fundraising activities; marketing and public relations; volunteer services; and technology management.

Preferred applicants should have a minimum of 5 years experience in management, fund raising and organizational development, and must be able to demonstrate

strong leadership skills, sensitivity to diverse communities, and proficiency in oral and written communication. Range is \$45,000 to \$50,000.

Please submit your resume, cover letter and answers to the questions below to search@leadershippbc.org by October 28, 2005. Applications submitted after that date will not be considered.

Answers to the questions below should be presented in no more than two (2) 8 1/2 by 11 pages. Please provide specific examples and/or concrete experiences to back up your answers.

Name _____

Telephone Number _____

Email Address _____

- 1) How would you define the role of Executive Director for Leadership Palm Beach County?
- 2) What would you want to accomplish in your first six months in this position?
- 3) How would you describe your strengths as a fundraiser?
- 4) How would you describe your ability to handle complex tasks?
- 5) If we brought ten people together who had worked with you (and you were not present) and asked them how they would describe you professionally what would they say about your skills, your personality, your work ethic?
- 6) What would you bring to Leadership Palm Beach County which would help us build and sustain growth?

search@leadershippbc.org

Seeking Position

Executive Director with experience in non-profit management, contract management, advertising, advocacy, development, and grant writing. Seeking position as Executive Director or Development Assistant. Contact at 561-379-7583.

THOUGHTS ON DONORS TAKING A MORE STRATEGIC APPROACH TO CHARITABLE GIVING (from www.afpnet.org Resource Center articles)

REPORT ASSERTS DONOR SHOULD THINK LIKE INVESTORS

(Oct. 31, 2005) A new report argues that donors can be more effective if they adopt a new perspective on charitable giving that borrows from many of the principles of sound investment.

An Investor Approach to Charitable Giving, developed by Toronto-based TD Economics, a branch of TD Bank Financial Group, which offers financial products and services around the world, asserts that donors will be able to give more and give more effectively if they take a more strategic approach to charitable giving. This is especially important now, the report notes, because Canadian charities are facing a growing number of challenges, including lack of long-term funding; scarcity of skilled, professional staff; increasing competition; and donor fatigue.

While a record number of Canadians will soon be retiring and can be expected to contribute more time and money to charities, following some of the strategies addressed in the report will ensure they have more of an impact.

“You don’t have to be Bill Gates to give strategically,”

says Jo-Anne Ryan, vice president, philanthropic advisory services, TD Waterhouse. “Canadians can be more effective in their philanthropic efforts if they approach it the same way that they approach investing, doing their homework and making thoughtful decisions.”

In the report, TD Economics offers advice from personal financial planning that can be applied to charitable giving. While none of the advice may be new to fundraisers, the report itself may be useful for members to discuss with current and prospective donors.

- * Develop a philanthropic plan
- * Conduct due diligence
- * Diversify
- * Give for the long haul
- * Build charitable giving into estate planning
- * Base financial decisions on all assets
- * Maximize tax credits

The four-page report, An Investor Approach to Charitable Giving, goes over each point in details and is available in PDF format on the TD Economics’ homepage.

MONTHLY MEETING NOTICE

National Philanthropy Day November 22, 2005
(no monthly meeting in November)

December 15, 2005

Speaker: Dr. Ron Nyhan, *Associate Professor*, FAU
Subject: “*Ethics in Fundraising*”

The Governor’s Club
Noon Buffet Luncheon
11:30 a.m. Networking • 12:00 Program

Fax or email your RSVP to:

Suzanne Cabrera (561) 494-0125
scabrera@thelordsplace.org by December 9, 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

BIOGRAPHY OF DECEMBER SPEAKER RONALD C. NYHAN

Ronald C. Nyhan is an associate professor and Director of nonprofit programs in the School of Public Administration at Florida Atlantic University. Dr. Nyhan sits on several nonprofit boards and conducts technical training on a variety of nonprofits issues in the South Florida area.

Prior to FAU, he was President and CEO of Landrum & Brown, Ltd. which oversaw the efficient operation and maintenance of large-scale facilities in the Middle East. He was also a Principal with Booz, Allen & Hamilton, where he served as Project Director for the management and productivity evaluations of local government functions at Chicago, Cincinnati, Dallas, Chicago, Los Angeles, Miami, New York, San Francisco, and Washington, D.C. He also served as Project Director for evaluations of federal agencies including Federal Rail and Federal Aviation Administrations.

His publications are found in *Public Productivity and Management Review*, *Evaluation Review*, *Health Care Review*, *Journal of Health and Human Services*, *International Journal of Organization Theory and Behavior*, *Public Administration Quarterly*, *The International Journal of Public Administration* and the *International Review of Administrative Sciences*.



AFP ID#: _____

Show Your Support for Philanthropy!

2005 Every Member Campaign Pledge Form

Name _____

Title _____

Organization _____

Address _____

City/State/Zip _____

Daytime Phone _____

Fax _____

Home Phone _____

Email _____

AFP Chapter to be credited _____

Please select one of the following giving options:

I would like to make # _____ monthly payments of \$ _____ for a total gift of \$ _____.

I would like to become an Alpha Society member with a continuing monthly gift of \$ _____.
(Please select payment option and authorize EFT transfer with your signature below)

Enclosed is a check for my first month's gift payable to "AFP Foundation for Philanthropy". Please transfer my monthly gifts from my checking account. I understand my future gifts will be transferred directly from my account. (signature required below)

Please charge my Visa/MasterCard/American Express/Discover (please circle one) and transfer my monthly gifts from my credit card. I understand my future gifts will be transferred directly from my credit card.

Card Number _____

Exp. Date _____

Signature Required _____

Date _____

I would like to contribute \$ _____ to the 2005 Every Member Campaign.

Enclosed is a check payable to "AFP Foundation for Philanthropy".

Please charge my Visa/MasterCard/American Express/Discover (please circle one).

Card Number _____

Exp. Date _____

Signature _____

Date _____

Please send me a reminder(s) in: Jan Feb Mar April May June July Aug Sept Oct Nov Dec 2005 (please circle).

I would like information on becoming an Omega Circle member by making a planned gift to the Foundation.

Thank you for your support of the AFP Foundation for Philanthropy. You will receive your recognition pin from your chapter. If you do not receive your pin, please call 703-519-8446. Charitable gifts to the Foundation are tax-deductible to the fullest extent of the law, as no goods or services are received in exchange for these gifts. Please send pledge forms to **AFP Foundation for Philanthropy, 1101 King Street, Suite 700, Alexandria, VA 22314-2967**
Attn: 2005 EMC or by fax to 703-683-0735 or email to foundation@afpnet.org. Questions: 703-519-8446