



LEAVE A LEGACY®

NON-PROFIT EDUCATION DAY

Friday, March 12, 2010

Victor Clarke Education Center at South Miami Hospital
6200 SW 73rd Street (US-1 and 62nd Avenue)

SHARING INSIGHTS, INFORMATION AND STRATEGIES
TO ENHANCE MIAMI'S NON-PROFIT SECTOR

PRESENTING
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A BRAVE NEW WORLD: THE CHALLENGES OF NAVIGATING CHANGE

Don't miss this important day of information in this collegial and stimulating environment. Our full day of learning will feature leading local and national experts who will provide a program on current topics geared to CEOs, Board Members and Development professionals; our luncheon round tables will focus on specific strategies to increase fundraising expertise; and the afternoon keynote speaker will discuss the transforming impact of social media on how non-profits communicate.

SCHEDULE OF EVENTS:

8:00 a.m. **Registration & Continental Breakfast**

8:30 a.m. **Welcome & Introductions**

Teresa Valdes-Fauli Weintraub, President, Fiduciary Trust International of the South
Henry H. Raattama, Jr., Shareholder, Akerman Senterfitt

8:35 a.m. **The Changing Climate for Philanthropy**

KEYNOTE SPEAKER/Moderator: Stacy Palmer, Editor, The Chronicle of Philanthropy
Panelists:

- *Stephen Parsons, CEO, Baptist Health South Florida Foundation*
- *L. J. Rodriguez, Vice President, Catholic Community Foundation*
- *Debi Harris, CEO, The Women's Fund of Miami-Dade*

10:05 a.m. **Donors as Investors: Changing Expectations**

Speaker/Moderator: Louis Wolfson III, Partner, Pinnacle Housing Group

Panelists:

- *Dennis Scholl, Miami Program Director, John S. and James L. Knight Foundation*
- *Robert F. Conrad, Vice President, University Advancement; Executive Director, Florida International University Foundation, Inc.*
- *Debbly Bussel, Principal, Bussel Philanthropy Associates*

11:15 a.m. **Break**

11:30 a.m. **Managing Your Budget is Critical to Your Success**

Speaker/Moderator: Carlos Molina, CFO, United Way of Miami-Dade

Panelists:

- Richard Perez, Vice President, Finance and Human Resources, Miami Children's Hospital Foundation
- David Halpern, President, Halpern and Associates
- Linda Lecht, President, The Education Fund

12:30 p.m. **Boxed Lunch Served**

Break Out Sessions

BREAK OUT SESSION TOPICS:

(During the Break Out Session, you will be able to select from one of the following five topics)

- **The Art of Making a Successful Ask in this Economic Climate**
Stephen J. Parsons, CEO, Baptist Health South Florida Foundation
- **Prospect Research: Using Philanthropy Data to Maximize Your Fundraising**
Julie Maspons, Director of Research, University of Miami
- **Grants Management: Accessing Government Stimulus Dollars**
Dan Wall, Director, Office of Grants Management, Miami-Dade County
- **Critical Marketing Techniques for Your Planned Giving Program**
Cynthia L. Beamish, Director of Planned Giving, University of Miami
- **Stewardship: The Path to Building Strong Donor Relationships**
Karen Dudley, Director of Philanthropy - Florida, The Nature Conservancy

1:30 p.m. **Social Media: Transforming the Way Non-Profits Communicate**

KEYNOTE SPEAKER: Farra Trompeter

Vice-President, Client Relationships + Strategy, Big Duck, Smart Communications for Non-Profits

With all the new technology, organizations have more ways than ever to communicate and reach donors online. This presentation will help participants sort through the different channels, share examples from leading nonprofits, and assist participants in determining which ways will be most effective for them — depending on their existing online communications, staff capacity, time, and budgets. The most popular social media tools will be highlighted and some of the latest statistics and demographics on social media use will be presented.

Farra Trompeter has more than 15 years of experience in communications and fundraising for nonprofit organizations. Farra is Vice President of Client Relationships + Strategy at Big Duck (www.bigducknyc.com), a communications firm that works exclusively with nonprofit organizations to transform the way they communicate. Farra's expertise focuses on helping nonprofits use the Internet (social media, websites, email, etc.) to increase visibility and connect with donors, activists, and other stakeholders.

3:00 p.m. **Closing Remarks**

Lucy Morillo, Esq., President, Miami Children's Hospital Foundation

REGISTRATION FORM

Please return by Friday, February 26th with your credit card information or check made payable to: LEAVE A LEGACY®, c/o Chase Marketing Group, 799 Brickell Plaza, Suite 707, Miami, FL 33131. This form may also be faxed to 305.379.0006. SPACE IS LIMITED TO THE FIRST 100 REGISTRANTS.

FOR MORE INFORMATION ABOUT THIS SEMINAR, contact Edwina Lau, Chase Marketing Group, 305.379.0800 or elau@chasemiami.com

- \$40 Pre-Registered
- \$50 At the Door
- I am a member of the Partnership for Philanthropic Planning of Miami-Dade County (50% Discount for members)

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