



# NOTES & QUOTES

## 2006 Officers

### President

Gus Kein, M.A., CFRE  
(954) 468-2691

### President-Elect

Barbara Witte  
(954) 761-9503 ext. 106

### VP Membership

Bich-ly Ludwig  
(954) 764-2800

### VP External Relations

Vacant

### VP Communications

Kathryn Cousins  
(954) 797-3807

### VP Professional Educations

Vacant

### Treasurer

Richard T. Schuster  
(954) 321-4643

### Secretary

Stacy Zolotin  
(954) 776-3002

### Immediate Past President

Lynn Croneberger, CFRE  
(954) 985-3454

## 2006 Board of Directors

- Lisa Williamson Barker
- Don Eachus
- Sara DuCuennois
- Danielle J. Johnson
- Judi Long, CFRE
- Gail Meltzer, CFRE
- Nancy Reiersen
- Berne Teeple
- Danay Torano
- Joanne Welch, CFRE
- Lisa Welch, JD

## DARING TO EMBRACE THE DIFFERENT

By Gus Kein, M.A., CFRE, President

The FX cable TV network recently introduced a controversial new show. In *Black. White.*, two families change colors and, with the help of heavy makeup and prosthetics, learn what it is like to live as members of a different racial group. Can you imagine waking up one day and living life in someone else's shoes? It would be a challenge, to say the least!



As fundraising professionals, we have a responsibility to represent the mission of our organizations to prospective donors and to represent donor interests to the organizations we serve. That responsibility includes understanding the changing demographics of our community. According to the Broward County statistics, from 1990 to 2000 the number of residents characterized as white decreased by 17% while those residents of Hispanic, African-American, Asian, and other origins increased nearly 97%. Some media sources have noted that Broward County is the fastest growing area in the nation for black residents. The days of South Florida as an elderly white retirement mecca, while not over, are changing.

It is certainly a challenge to do fundraising with people who are familiar to us. It is a whole other animal to reach out to people different from yourself – and then ask them to support your cause. At our April luncheon meeting, we were challenged and encouraged by our speaker, AFP National Chair Alphonse Brown, ACFRE, who spoke on the topic of "Cultural Change and the Implications for Fundraisers." As our community changes and new folks join us who come from different cultures, races, economic backgrounds, and varied religions, we have an obligation to the organizations that we serve to reach out to them as true professionals.

But what about our AFP chapter? Are we ready, willing and able to embrace the different? In March 2005, Lynn Croneberger and our chapter were proud to join with our friends Mary Riedel and Danay Torano of the *Sun-Sentinel* in crafting our first ever AFP/*Sun-Sentinel* Joint Diversity Initiative. The initiative created the *AFP/Sun-Sentinel Diversity Scholarship Fund*. The fund provided \$3,000 in funding to help reach out to organizations with no exposure to AFP. Members of our chapter worked to reach out to nearly 120 organizations that we recognized had not participated in AFP before. Faith based groups, economically challenged organizations, and non-profits serving differing cultures were encouraged to participate in AFP. The result was that 11 people participated in an AFP activity for the first time. Even better – the *Sun-Sentinel* has agreed to work with us on this project for another year.

How can we support this effort? One way is to break out of our comfort zones and reach out to the first time visitor at our monthly luncheons, rather than hang out with our established friends. We can recognize that some folks find us intimidating; we need to help them over that! We can strive to break down barriers to people and organizations, such as costs or bias, which keep people from getting the benefits of association with AFP. Each one of us can play a small role by being open and accepting of others. We can do that by embracing the different. Won't you give it a try?

# AFP MONTHLY LUNCHEONS

**Great Opportunities to Learn  
Great Opportunities to Network**

**July 13, 2006 at 11:30 a.m. – Reaching the New Generation of Donor:** One of the biggest challenges facing nonprofits today is how to engage a new generation of donors. If your organization is like most, you currently have a donor base that is aging. Baby Boomers are starting to take on the philanthropic ways of their parents but how do you involve the pre-boomer generations?

One way of attracting the younger donor that has proven successful for a growing number of nonprofits is the creation of a “young professionals” social network program. Learn the pros and cons of starting a “young professionals” organization from two local nonprofits that have done it – the Humane Society of Broward County and the American Red Cross.

Mark Your Calendar for these upcoming luncheons! And make sure we have your updated email address so we can send you the details on topics and speakers. Please send us your up-to-date contact information via email to: [AFP-Broward@att.net](mailto:AFP-Broward@att.net)

**August 10, 2006 at 11:30 a.m. -- Special Event Fundraising: The Whole Truth,** Susan Holtzman, Eventures Special Events: Learn how best to fit special events into your overall development plan and how to evaluate their effectiveness in terms of the investment of time and money. It's FUNdraising, not FUNraising. Sponsored by: The Sponsorship Network.

## ABOUT AFP

The Association of Fundraising Professions (AFP) represents over 25,000 fundraisers in more than 170 chapters throughout the world, working to advance philanthropy through advocacy, research and education. The Association fosters development and growth of fundraising professionals and promotes high ethical standards in the fundraising profession.

The Fort Lauderdale/Broward Chapter has a membership base ~160 development professionals in the area. For more information about AFP and our other activities, please visit our website at [www.afpbroward.org](http://www.afpbroward.org).

## NOTES & QUOTES CONTACTS

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# BOARD GOVERNANCE

By Gail S. Meltzer, CFRE

Our chapter is currently examining and updating our by-laws and all issues concerning best practice with regard to board governance. A small committee (Lynn Croneberger, Gus Kein, Chuck Loring, Rick Schuster, Barb Witte and myself) has been working over many months to create policies in four distinct areas. We want to take this opportunity to remind you to look at the board of your own organization and see if a board governance committee could help do some fine-tuning in your own shop.

The main areas we are addressing are:

- 1. Recruitment and election of board members**
  - update board member job descriptions
  - create a list of what skills and expertise the board needs
  - identify potential board members and coordinate the cultivation process for each
  - tighten up nomination, application and election procedures
  - nurture potential leadership within the board
  - evaluate board members' eligibility for re-election
- 2. Orientation and education of board members**
  - orient new board members
  - provide an orientation manual
  - provide information on continuing education opportunities
  - establish an effective communication system to keep board members informed and updated
  - ensure that board members understand their legal duties (duty of obedience, duty of care, duty of loyalty)
- 3. Evaluation of the board's performance**
  - Annually lead the board in its self-assessment and develop recommendations to the board for self-improvement
  - At least bi-annually, lead board members in their individual self-evaluation and discuss ways to strengthen their board service
- 4. Review and update of the by-laws**
  - Assure that the by-laws are reflective of the current board and chapter missions, infrastructures and responsibilities

A full committee report will be available to chapter membership before the end of this year. Meanwhile, if you have questions or suggestions or would like to help, please feel free to contact me at 954-524-8626 or [gmeltzer@fundraisingadvantage.com](mailto:gmeltzer@fundraisingadvantage.com).

**For Career Opportunities  
visit  
[www.afpbroward.org](http://www.afpbroward.org)**

# AFP MEMBER NEWS

**Audra Vaz** has been promoted to Assistant Director at Volunteer Broward.

**Soraya Rivera-Moya** was recently appointed Executive Director for the Ronald McDonald House in Miami, in addition to serving as Executive Director of the Fort Lauderdale House for the past 4 years. Ronald McDonald House is a "home away from home" for families of sick children receiving treatment at any Broward County pediatric hospitals.

Two well-known local consultants and long-time AFP members, **Gail Meltzer, CFRE**, and **Dr. Terrie Temkin**, have joined forces with Robyn Perlman to form **CoreStrategies for Nonprofits, Inc.** The three principals are working with local, national and international nonprofit clients to take their capacity-building efforts to the highest level. Visit [www.corestrategies4nonprofits.com](http://www.corestrategies4nonprofits.com).

**Shelley Goren** was appointed Vice President of Development at Broward House. The Broward House mission is to improve the lives of individuals living with or at risk for HIV and other health issues through the provision of high quality services in a loving, caring atmosphere, regardless of the individuals' financial status and to impact community awareness through the provision of comprehensive prevention and education programs



Leslie Brown, CFRE, with Gen. Colin Powell at the AFP International Conference in April 2006

**Leslie W. Brown, CFRE**, has been appointed Chair of the Committee of Directorship for the AFP Foundation. A significant contributor to the AFP Foundation, Leslie served on the Foundation Board for six years and was recently recognized as a Charter Member of the AFP Foundation's Leadership Society.

**Andrea Bradley**, CEO of Women In Distress of Broward County, Inc. has been elected to the Board of Directors of the state-wide Florida Coalition Against Domestic Violence (FCADV) as well as elected Vice President of the Broward County Domestic Violence Council.

Please share your recent accomplishments with your AFP colleagues including new positions and assignments, honors, professional affiliations, marriage or births. Please send your member news to Sara DuCuennois at [ducuenno@nsu.nova.edu](mailto:ducuenno@nsu.nova.edu).



# WELCOME TO OUR NEW MEMBERS

**Karen Alphonse**  
Vice President  
Exec Searches.com

**Whitney Luzzo-Kelly**  
Director of Development  
Miami City Ballet

**Robert Boo**  
Director of Development  
GLCC of South Florida

**Diana Metcalf**  
Special Projects Manager  
American Red Cross

**Andria M. Cunningham**  
Director of Development  
Kids@Home



**Allison Mintz**  
Development Associate  
for Special Events &  
Volunteers  
Florida Grand Opera



**Kathy Dunbar**  
Executive Director  
Healthy Mothers Healthy Babies

**James E. Faison**  
Program Coordinator  
Volunteers of America of Florida

**Barbara Ouarov**  
Assistant Director of  
Development  
Ann Stork Center

**Doris Porter**  
Executive Director  
The Andy Roddick Foundation



**Shannon Faison**  
Grants Manager  
Florida Grand Opera



**Debbie Rahamim**  
Sponsorship Coordinator  
Sun-Sentinel/News in  
Education



**Sherry Friedlander**  
Founder  
A Child is Missing



**Meredith D. Ray**  
Development Officer  
Starlight Starbright



**Peggy Hooper**  
Planned Giving Officer  
American Cancer Society

**Rana Roseberg**  
Community Relations  
Coordinator  
JAFCO



**Brent Hursey-McLaughlin**  
Executive Director  
South Florida Urban Ministries

**Will Spenser**  
Broward House, Inc.



**Lynda Wilson**  
International Game Fishing  
Association

**Roderick A. Kukurudz**  
Director  
Citizens Events

# TERRIE ON NONPROFITS

## CLARIFYING ENDOWMENTS

**Q:** I have several questions related to endowments. If an organization establishes an endowment fund, can other donors contribute funds to build it up? If so, can the donors restrict these donations to the agency's endowment to certain causes? Is it good business practice to use the interest from an endowment for operating expenses on a regular basis? Or, should an organization seek grants for operating funds and reserve the non-designated portion of the endowment fund for emergency expenses?

**A:** Before addressing your questions specifically, I think it would be helpful to clarify the term endowment. A true endowment is designed to secure an organization's future for generations to come. Money is set aside to grow. The principal is never touched. The goal is that *eventually* there will be sufficient funds to draw out the interest to supplement current giving when that fails to meet organizational needs.

There is some confusion about the term endowment because organizations often talk about endowing programs such as scholarships, awards or particular client services. This type of "endowment" – generally supported by restricted gifts – may be initiated by a single individual or family with a dream and the financial wherewithal to put their money where their mouth is. But, it may also be initiated by the organizations when they identify a need that they know will resonate with a large number of people. Many times the money for these programs will be given "in perpetuity," where again the principal is to be kept intact, but this does not have to be the case.

Given this distinction, the answers to your questions become more evident. Generally, multiple donors are welcome to help "endow" specific programs, though occasionally the terms governing such a program will prohibit additional gifts from outside sources. A broad donor base is actually essential to building an organization's endowment though, since it is almost impossible to amass sufficient funds to ensure a secure future without such a base.

To give you an example, we all know education is expensive. Its costs escalate annually. With few families able to afford the actual costs associated with obtaining a college degree, there must be subsidies if this country is to continue turning out doctors, teachers, engineers and scientists. Recognizing this reality early in the game – and intent on not only keeping its doors open but continuing to turn out quality doctors, teachers, engineers and scientists – Harvard University aggressively sought to build an endowment program. The fund development office threw a wide net and today its endowment stands in excess of \$26 billion – yes, that's billion with a "b." The interest on that sum can provide for a lot.

Of course, how that money is used relates to your next question. There should be written organizational policies dictating where, when and how the funds from an endowment

can be used – this includes whether any of the monies can be restricted to certain programs or causes – how these monies are to be invested and what funds are to go to make up the endowment in the first place. So, when you ask about using these funds to pay operational expenses, one would have to look at the policies of the specific organization in question. Because endowment programs are relatively new outside of hospitals and universities most organizations don't have sufficient funds in their endowments to use those dollars to pay current expenses – at least on a regular basis or without draining the corpus.

As to using endowment monies as emergency funds, while some organizations do permit tapping their endowments when faced with the unexpected, a distinction is generally made between endowment funds and reserve funds. Regardless of the pocket in which it's kept, every organization should be setting aside money specifically to handle the unforeseen needs, such as hurricane cleanup and repair. As is often the case, these issues fall to the board to determine.

Terrie Temkin, Ph.D. is an internationally recognized governance and planning expert. She is president of NonProfit Management Solutions, Inc. a principal in Core Strategies 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.

## WILL YOUR DEVELOPMENT OFFICE BE ABLE TO WEATHER THE STORM?

By Kathryn J. Cousins, American Red Cross



Alberto became a reality this hurricane season just a *little* sooner than any of us would have liked. Thankfully, Broward was spared most of the storm, but I hope you used just the possibility of being struck this early as a good "run through" for you and your loved ones. Hopefully, you have learned from last season and have put together a personal disaster response plan. At the very least, our homes should have enough water and non-

perishable food items for each person for three days, a good supply of batteries, and a car that has a full tank of gas.

Now, what about your development office? Is it ready for the worst case scenario? Hundreds of non-profits across the nation were affected by last year's storms; too many were forced to close down completely, and still others limped along with an uncertain future. Those that survived did so because of one simple reason: They had a plan!

Each year, at least by April, you should be considering your *disaster fundraising action plan*. Literally, it should address what you need to have in place to continue fundraising for your organization (and therefore, continue offering programs & services) should the infrastructure of the organization be compromised, or worse--totally incapacitated

due to a large-scale natural or man-made disaster.

Always plan on the worst-case scenario. Have an agreement in place with a colleague, board member, or community partner whose business ideally is on one of the “essential power restoration grids” (i.e., near a hospital or a school) that would allow you to have access to a computer and an analog phone line. Sure, you may be thinking, “I can do this from home” – but never assume that your home will be spared or that your power will be restored quickly when creating your plan.

Ensure that you have a complete exported file of your current (0-12 month) donor list that includes telephone numbers and giving history and that is stored in at least two alternative, safe sites. There are local companies who can do this for you for a reasonable rate – much more reasonable than if you should lose it! The maximum age of this file should be no greater than 60 days old, so you will definitely need to update it throughout hurricane season.

Then, make your master list of essential contacts. If your development office is forced out of your “regular” space for longer than a week or two, you’ll want to notify your board members and leadership volunteers as soon as possible. You may have to have your phone numbers forwarded by Bellsouth and your mail redirected to a post office box for the time being.

Make a list of donors who will need to know how to reach you, and once settled, start the process of contacting them. I recommend starting with your elderly, and planned or major gift donors whom you know live in Broward’s evacuation zone, and framing your call as a *personal* welfare inquiry. Once you know they are ok and they know that their beloved organization is going to be, too, you can get back to the *business* of fundraising.

Step by step, it is imperative that you also marry your public relations messaging with your development language so that beyond your volunteers and donors, the general public – *your consumers and prospects* - understand your organization is still a vital part of the Broward community, even if it is temporarily in an indeterminate state.

Your joint PR and development messaging surrounding the disaster’s impact on your organization will also make it easier for you to make those inevitable donor requests for the replacement of those nuts and bolts damaged or destroyed during the crisis, or make the case for a permanent change of location!

We will all hope that our disaster fundraising action plans will never have to be put *into* action. But, given the weather predictions for the next several years, the unbelievable destruction of the past two seasons, and a *named storm* so very early in this one, it is better to err on the side of caution. Good luck and be prepared!

# NATIONAL PHILANTHROPY DAY

Thursday, November 15<sup>th</sup> 2006

Broward County Convention Center

11 AM Registration / 12 Noon Luncheon and Awards

Sara DuCuennois and Berne Teeple, Co-Chairs



On November 15<sup>th</sup>, 2006, our chapter will be among the hundreds of AFP chapters across North America celebrating National Philanthropy Day (NPD) and the spirit of giving. More than 700 individuals will gather at the Broward County Convention Center to honor Broward County’s most

outstanding philanthropists, supporters, and volunteers. As Broward County’s premier celebration of philanthropy, there are several opportunities for your organization to be part of this prestigious event.

### Identify an Individual Table Honoree:

NPD is a perfect venue to recognize an outstanding individual, foundation, or corporation that has contributed both time and resources to your organization. Your honoree will be listed in the luncheon’s official program and in a special philanthropy section prepared and circulated by our media partner, the *Sun-Sentinel*. The cost of a table honoree is \$600 and includes 10 seats at the luncheon. For further information, contact Kathy Thomsen at [kthomsen@legalaid.org](mailto:kthomsen@legalaid.org) or Sally Gress at [sjkgress@hotmail.com](mailto:sjkgress@hotmail.com).

### Nominate Someone for a National Philanthropy Award:

The Fort Lauderdale/Broward Chapter of AFP is pleased to honor individuals, corporations, volunteers, foundations, organizations, and leaders whose remarkable vision, generosity, commitment, dedication and talent have enhanced the strength and effectiveness of philanthropic endeavors in Broward County. The Outstanding Award winners will be featured prominently in a special philanthropy section prepared and circulated by our media partner, the *Sun-Sentinel*. *All nomination forms must be submitted by July 17, 2006.* For further information or to receive a nomination form, contact Joanne Welch at [welchj@lls.org](mailto:welchj@lls.org).

Outstanding Philanthropist

Outstanding Foundation

Outstanding Volunteer Fundraiser

Outstanding Corporation

Outstanding Fundraising Executive

Outstanding Youth in Philanthropy

### Sponsorships:

Several sponsorship opportunities are available for NPD. Benefits include priority luncheon seating, invitation to the VIP reception, recognition in the luncheon program and a special philanthropy section prepared and circulated by our media partner, the *Sun-Sentinel*. For sponsorship information, contact Sara DuCuennois at [ducuenno@nova.edu](mailto:ducuenno@nova.edu).

On behalf of the entire NPD host committee, we look forward to having you and your nonprofit organization join us as we all come together to celebrate philanthropy in our own community.

### Special thanks to the 2006 National Philanthropy Day Host Committee:

Marjie Aloni, Pat Brynes, Kathryn Cousins, Don Eachus, Shelley Goren, Sally Gress, Danielle Johnson, Gus Kein, Madeline Keller, Carol McKeever, Nancy Reiersen, Laurie Sallarulo, Kathy Thomsen, Danay Torano, Joanne Welch.



Fort Lauderdale/Broward Chapter

# AFP LUNCHEON



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Greater Fort Lauderdale / Broward Chapter  
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