

A FORUM FOR
DONORS, CHARITIES &
ESTATE PLANNERS



THURSDAY, NOVEMBER 13, 2014
HUTCHINS STREET SQUARE • LODI, CA

co-hosted by:



This exciting event offers a wide variety of topics of interest to professional advisors, nonprofit executives, board members, donors and others involved in charitable giving. CPAs and attorneys will have the opportunity to earn continuing education credits. Additionally, the Summit provides the perfect forum to meet and network with other philanthropically minded people from around the Valley.

*“In this world, it is not what we take up but
what we give up that makes us rich.”*

– HENRY WARD BEECHER (1813-1887)

PROGRAM SCHEDULE

THURSDAY, NOVEMBER 13, 2014



7:45 AM	Registration, Pre-Event Networking & Continental Breakfast	
8:30 AM	Opening Remarks	
8:45 AM	KIRST	Keynote Speaker – KAY SPRINKEL GRACE – <i>Philanthropy at a Crossroads: Renaissance or Revolution?</i>
10:30 AM	Break	
10:45 AM	KIRST	GENERAL SESSION – Family Legacy Philanthropy DONOR PANEL – Phyllis Grupe, Annette Murdaca, Tony and Gloria Souza
12:00 NOON	Lunch & Networking	
12:30 PM	KIRST	NATIONAL PHILANTHROPY DAY AWARDS – Association of Fund Raising Professionals California Capital Chapter San Joaquin Extension GRANTS – Lodi Community Foundation and Community Foundation of San Joaquin
1:30 PM	BREAKOUT SESSION #1	
B1-1	KIRST	KAY SPRINKEL GRACE – <i>The AAA Way to Fund Raising Success</i>
B1-2	CRETE	RICHARD RUVELSON – <i>Taxing Thoughts for Charities in 2014</i>
2:30 PM	Break	
2:45 PM	BREAKOUT SESSION #2	
B2-1	KIRST	BARBARA DALY – <i>Telling Your Story through Video</i>
B2-2	CRETE	PAUL LANNING, Ed.D., CFRE – <i>Painting the Picture for Major Gifts</i>
3:45 PM	Closing Remarks & Drawing	
4:00 PM	Wine Down – Drawing, Networking & Wine Tasting	
5:00 PM	Event Concludes	

MARK YOUR CALENDARS!

2015 COMMUNITY PHILANTHROPY SUMMIT • THURSDAY, NOVEMBER 12, 2015!

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The ARC San Joaquin / United Cerebral Palsy Association

Child Abuse Prevention Council/CAPC Foundation

Community Foundation of San Joaquin

Dameron Hospital Foundation

Friends Outside

Lodi Community Foundation

LOEL Senior Center

Lodi Memorial Hospital Foundation

Salvation Army

San Joaquin Pride Center

University of the Pacific - Development

University of the Pacific - External Relations

United Way of San Joaquin

Women's Center Youth and Family Services

SPECIAL THANKS TO THE FOLLOWING:

Scott and Kathy Beattie – *Wine basket door prize*

Lincoln Center – *Door prize*

Lodi Salvation Army Culinary Arts Program – *Appetizers*

SASS! Public Relations – *Our go-to firm for all things marketing & PR*

Platinum Home Mortgage – *Wine basket door prize*

Vino Farms – *Wine*

Wine & Roses Hotel – *Speaker accommodations*



KEYNOTE SPEAKER

KAY SPRINKEL GRACE

Kay Sprinkel Grace understands the challenges of 21st century philanthropy as well as its opportunities, and brings her experience from working with countless nonprofit organizations to bear on the current issues affecting donor development, fund raising, outreach, message strategy and volunteerism.

As principal of her own organization since 1989, her clients include public media, hospitals, universities, arts and cultural organizations, environment and social justice organizations, churches and education, as well as community-based services. From 2004 – 2007 she was principal lead consultant to the Corporation for Public Broadcasting for a major giving initiative in which more than 100 public television licensees participated. A goal of her consulting is to mentor and strengthen leaders within organizations to grow their success while achieving their immediate goals.

She is a frequent speaker at Association of Fundraising Professional (AFP) local and regional meetings, including AFP Vineyards and Golden Gate, as well as AFP International in 2014. She has participated internationally as a keynote speaker and workshop leader in conferences in Australia, The Netherlands, Slovakia, Czech Republic, Republic of Georgia, Sweden, Great Britain, France and Russia. In 2013 she returned to the International Fundraising Festival in Prague, and was a workshop speaker at the International Fundraising Congress in The Netherlands and a keynote speaker at the Blackbaud Conference in Sydney, Australia, both in October, 2013. Her BA and MA are from Stanford University, where she is a recipient of their highest award for volunteer service, The Gold Spike, as well as their Centennial Medal, Outstanding Achievement Award, Award of Merit and Associates Award. The Golden Gate Chapter of AFP awarded her their Outstanding Professional Fundraiser Award (now the Henry A. Rosso Award) and their President's Award.

She is the author of six books related to philanthropic practices and board engagement: *Beyond Fund Raising* (1997 and 2005, Wiley); *High Impact Philanthropy* (2001, co-author Alan Wendroff, Wiley); *Over Goal!* (2005, Emerson & Church); *The Ultimate Board Member's Book*, (Third Edition, Revised 2013, Emerson & Church); *Fund Raising Mistakes That Bedevil All Boards* (Revised 2009, Emerson & Church) and *The AAA Way to Fundraising Success: Maximizing Involvement, Maximizing Results*, (2009, Whit Press of Seattle and Jackson Hole).

Her articles have appeared in *Advancing Philanthropy*, the publication of the Association of Fundraising Professionals (AFP), and she was a regular contributor for more than 10 years to *Contributions*, a publication of Emerson & Church, Medfield, MA. She has provided national and regional webinars for organizations including The Piper Trust, Arizona; California Council of Land Trusts; Bank of America; Asking Matters; the Corporation for Public Broadcasting and Hubb (Canada).

As a volunteer, she serves on the Advisory Board of the Czech Fundraising Institute, Prague, Czech Republic, and the governing board of Philharmonia Baroque Orchestra, San Francisco.

She lives and works in San Francisco and is passionate about her family, philanthropy, writing, travel and her photography.

BOOKS ON SALE!

Take and share Kay's wisdom.
– \$20 each –

SPEAKERS



TIM DALY

Master Of Ceremonies

News 10's award winning reporter Tim Daly joined the station in September 1991. Tim is a news reporter/fill-in anchor based in the News 10 San Joaquin Valley newsroom. Through the years, he has covered a number of major stories, including the trials of Ellie Nesler, Charles Ng, Cary Stayner and Scott Peterson. Tim is active in the community, frequently speaking to groups and appearing at events in San Joaquin and Stanislaus counties.



BARBARA DALY

Telling Your Story Through Video

Barbara Daly is the owner of Daly Video Services, a video production company committed to telling stories that engage and bring awareness to non-profits and businesses in San Joaquin County. Barbara's abilities to produce, direct, write, voice and edit allow her to have more creative control of a video production, bringing higher quality work, reduced prices and greater satisfaction to her clients. Throughout the last 20 years Daly Video Services has been recognized for outstanding video productions from the International Telly Awards as well as The Communicator Awards. Barbara's most proud of her work with local non-profits but admits she may be most well known for her "Fighting Forbes" video with the colorful Greg Basso.



PAUL LANNING, ED.D., CFRE

Painting the Picture for Major Gifts

Dr. Paul Lanning is co-founder and managing partner of RPR Fundraising, LLC, a Los Angeles-based boutique consulting firm that serves a variety of California-based non-profit organizations seeking to increase their capacity to attract philanthropic support. He oversees client relationships and day-to-day operations while serving as lead counsel for a select number of clients. Paul holds a Doctorate in Education Administration & Leadership from the University of the Pacific, in addition to a Master's Degree in Sport Management from the University of Massachusetts, Amherst and a Bachelor's Degree with honors in Political Science from the University of California, San Diego. He is a Certified Fund Raising Executive and has taught numerous graduate-level courses in fundraising and non-profit management.



RICHARD L. RUVELSON

Taxing Thoughts for Charities in 2014

Richard Ruvelson leads the nonprofit tax practice of Green Hasson Janks. He has more than 30 years of experience in providing tax services to nonprofit clients, including public and private colleges and universities, private foundations, supporting organizations, hospitals and hospital systems, and religious and cultural organizations. He has worked closely with clients on a wide range of nonprofit issues including tax exemption, unrelated business income tax, charitable giving and substantiation, independent contractor issues, and Form 990 and Form 990-PF reporting. Throughout Richards's career, he has taught at both local and national training sessions and has spoken on nonprofit and other tax topics for both professional and trade groups. Richard earned his Bachelor of Arts degree from the University of Wisconsin-Madison and his Juris Doctor from the William Mitchell College of Law.

2014 CPS FAMILY LEGACY PHILANTHROPY PANEL



PHYLLIS GRUPE

A native Californian, Phyllis Grupe currently serves as the Chairperson of the Community Partnership for Families of San Joaquin, an agency she helped found in 1998. She is also a member of the Urban Land Institute and was a founding team member of San Joaquin A+, an organization dedicated to eliminate literacy in San Joaquin County. Phyllis has served on numerous nonprofit boards and received many awards for her civic and philanthropic efforts. Together with her husband, Fritz, the Grupes have focused their charitable energies on public education, literacy, and community development to improve the lives of everyone who calls San Joaquin County home.



ANNETTE MURDACA

Another native Californian, Annette Murdaca is a third generation member of the Vaccarezza Family of Lodi. With a solid background of success in two family businesses, Annette and her husband, Jim, established the Vaccarezza-Murdaca Family Foundation in 1998 and helped build the Lodi House (women's shelter). She remains the founding mother of Festa della Donna, an annual fund raising event for Lodi House. The Murdacas have also supported the Women's Shelter at Salvation Army Hope Harbor and work tirelessly to provide food, shelter, and educational opportunities to those in need so that "all God's children can find comfort and care."



TONY & GLORIA SOUZA

Born in Tracy, Tony Souza and his wife, Gloria, have been and remain community and philanthropic leaders. Like the Grupes and Vaccarezza-Murdacas, a complete list of their accomplishments and contributions could fill volumes. The majority of their efforts have been in the areas of healthcare (Tony helped create the Tracy Community Memorial Hospital Foundation), church (St. Bernard's Church and School), education and Rotary. Today, they continue their legacy of giving through the Souza Family Foundation and work to bestow the values taught to them by their parents to their children and grandchildren.



MODERATOR: LINDA PHILIPP, FAHP

Linda J. Philipp, CEO and President of the Community Foundation of San Joaquin, will serve as Moderator for the Family Legacy Philanthropy session. Ms. Philipp has worked for local nonprofit organizations for the past thirty-six years beginning her career at Lodi Memorial Hospital where she helped to establish the Lodi Memorial Hospital Foundation. She is a Fellow in the Association of Healthcare Philanthropy and the current chair of the AFP California Capital Chapter San Joaquin Extension. Linda and her husband, Larry, have created the Philipp Family Donor Advised Fund at CFOSJ in order to pass their love of community and philanthropy on to their ever expanding family.



NATIONAL PHILANTHROPY DAY AWARDS

The Association of Fundraising Professionals (AFP) California Capital Chapter *San Joaquin Extension* awards San Joaquin Valley's individuals and organizations whose philanthropic achievements have made an impact on our society and represents philanthropy at its best.



PETER AND ALEXANDRA OTTESEN

Outstanding Philanthropist

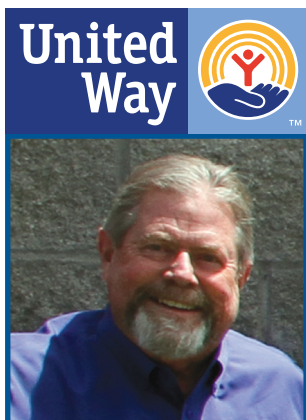
Peter and Alexandra "Lexie" Ottesen exemplify philanthropy. They are benevolent donors, educators, advocates, volunteers, mentors and environmentalists. Their deep commitment to education fuels their passion and generosity. The Ottesens are true unsung heroes preferring to quietly give while inspiring others to donate millions of dollars to charitable organizations. Their giving in San Joaquin County has included the University of the Pacific, Haggin Museum, Community Blind Center, Ducks Unlimited, Stockton Chorale and Zion Chamber Orchestra. Peter's weekly articles in The Record champions conservation and excursions that take children and families outdoors to relish in the bounty of nature. He designed the San Joaquin County Outdoor School, an education program that had been in place for more than 35 years. Lexie is a Director for the Community Center for the Blind and a Haggin Museum Art and History Docent.



JOSEPH BERNARDICOU

Outstanding Youth in Philanthropy

Joseph "Joey" Bernardicou is a Youth Minister for the Cathedral of The Annunciation in Stockton, Western Region Youth Spokesman for American Heart Association and the Founder and Chairman of the Joseph Bernardicou Golf Tournament. Proceeds from the tournament have been donated to the American Heart Association and area hospitals for research and development of treatment for heart conditions like the one he has lived with for several years. As a member of Annunciation Parish, he socializes and interacts with the youth of the Stockton community and is as a positive force in the lives of Stockton children who would otherwise be surrounded by dysfunction, poverty, and violence. Joey volunteers as a designated driver and serves on several St. Mary's High School service clubs. In the opinion of his teachers and church, Joseph embodies the words of St. Francis de Sales, "Be who you are and be that well."



UNITED WAY OF SAN JOAQUIN

Outstanding Philanthropic Organization

For over 88 years the United Way of San Joaquin County has been raising funds to support local nonprofit charitable organizations and the people they serve. What began as the "Community Chest," the current United Way has become a trusted vehicle for connecting donors who want to help with the agencies who serve the neediest. Andy Prokop, current CEO, conservatively estimates that over the past twenty years, more than \$50 million has been raised, primarily through the convenience of payroll deduction, for the benefit of more than 1,000 nonprofit agencies that have come to rely on the support provided by our United Way in order to operate. Andy is the media "go-to" who always displays a "cheerleading" optimism when speaking on behalf of all local nonprofits. In partnership with local donors, Andy, the UWSJC Board of Directors and Staff are united in improving lives in San Joaquin County.

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Co-Chairs John, Linda, Scott and Darrell

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ABOUT US

Community Foundation of San Joaquin (CFOSJ) provides leadership, promotes a culture of giving, and creates resources that address the needs of our community.

The Lodi Community Foundation (LCF) has been established to help accomplish the philanthropic goals of our community effectively, efficiently and in a sustainable manner. This is a joint endeavor and we need you to make LCF and our community a true success.

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