

A FORUM FOR DONORS, CHARITIES & ESTATE PLANNERS

## EDUCATION



## AWARDS



**COMMUNITY**  
PHILANTHROPY SUMMIT

## NETWORKING



## OPPORTUNITIES

THURSDAY, NOVEMBER 9, 2017 • HUTCHINS STREET SQUARE • LODI, CA  
[www.philanthropy-summit.com](http://www.philanthropy-summit.com)

# THANK YOU TO OUR SPONSORS

## CORPORATE SPONSORS

Bank of Stockton  
Bowman and Company, LLP  
Daniel Raymond, Valley Wealth Strategies, LLC  
Wells Fargo Bank  
GEM Mortgage  
Sacramento Region Community Foundation  
Vino Farms

## TABLE SPONSORS

A.G. Spanos Companies/Super Bowl Raffle  
Beattie and Aghazarian  
Child Abuse Prevention Council  
Children's Home of Stockton  
Hearts of Harvest Foundation/Scoop Ministries, Inc.  
Women's Center – Youth & Family Services  
Hospice of San Joaquin  
Neumiller & Beardslee  
Stockton Unified School District  
United Way of San Joaquin  
University of the Pacific

## SPECIAL THANKS TO THE FOLLOWING

Hutchins Street Square – Facilities  
GEM Mortgage – Door Prize  
Vino Farms – Speaker gifts  
Wine and Roses – Door Prize

## Community Philanthropy Summit is Co-Hosted by:



### BOARD OF DIRECTORS



**Dr. Ted Leland**  
Chairperson

**Cynthia Souza**  
Vice Chairperson

**Teresa Mandella**  
Treasurer

**Scott G. Beattie**  
**Karen Bensch**

**Duane Isetti**

[www.cfosj.org](http://www.cfosj.org)  
(209) 943-2375

**Moses Zapien**  
Chief Executive Officer/  
President

**Colleen D. Stewart**  
Secretary

**Julie DeAraujo**  
**Mary-Elizabeth Eberhardt**



### BOARD OF DIRECTORS



**John K. Ledbetter**  
Chairperson

**Colleen D. Stewart**  
Vice Chairperson

**Mary Ann Maggio**  
Treasurer

**Trenton Diehl**  
**Christine Franklin**

**Sabrina Schneweis-Coe**

**Russ Hayward**  
**Paula Leary**

[www.lodicommunityfoundation.org](http://www.lodicommunityfoundation.org)  
(209) 910-3523

# PROGRAM SCHEDULE

9:45 AM – 10:15 AM	LOBBY	<b>Registration &amp; Pre-Event Networking</b>
10:15 AM – 10:30 AM	KIRST	<b>Opening Remarks – Tim Daly</b>
10:30 AM – 11:45 AM		<b>Community Challenges and Opportunities</b>
	COTTAGE KIRST PISANO	<b>1. Education – Mike Klocke</b> <b>2. Homelessness – Anthony Barkett, John Mendelson &amp; Kathy Miller</b> <b>3. Affordable Housing – Carol Ornelas</b>
11:50 AM – 12:20 PM	KIRST	<b>Lunch</b>
12:20 PM – 12:45 PM	KIRST	<b>National Philanthropy Day Awards – Association of Fund Raising Professionals California Chapter, San Joaquin Extension – Diane Vigil</b>
12:45 PM – 1:30 PM	KIRST	<b>Keynote Speaker – Don Shalvey</b> "Songs in the Key of Philanthropy"
1:30 PM	KIRST	<b>Closing Remarks &amp; Door Prizes – Tim Daly</b>



## KEYNOTE SPEAKER DON SHALVEY

### "Songs in the Key of Philanthropy"

Don Shalvey is a Deputy Director for K-12 Education at the Bill & Melinda Gates Foundation, where he oversees charter schools, teacher preparation, and school and system leadership. Prior to joining the foundation, Don was the founder and CEO of Aspire Public Schools, and has spent the past 40 years in public education where he is widely recognized as a leader in public school reform and the charter school movement.

In 1992, Don served as the Superintendent of San Carlos School District, where he sponsored the first charter school in California.

The San Carlos Charter Learning Center became a California Distinguished School and has since served as a model for many other charter schools. In 1998, Don and entrepreneur Reed Hastings co-founded Californians for Public School Excellence, a grassroots organization that led to the passage of the Charter Schools Act of 1998, which lifted the cap on the number of charter schools in the state. Dr. Shalvey is a frequent advisor to policy makers, practitioners and authorizers of charter schools across the nation. In 2002, the prestigious Ashoka Foundation recognized Don as a Fellow for his outstanding work as a social entrepreneur. More recently, Don was given the James Irvine Foundation Leadership Award for advancing the quality of life for Californians, and in June 2009, he was elected to the Charter School Hall of Fame.

Don earned a Doctorate of Education in Educational Leadership/Administration from the University of Southern California, a Masters of Education in Counseling and Guidance from Gonzaga University, and a B.A. from LaSalle College.

## COMMUNITY CHALLENGES & OPPORTUNITIES

Nonprofit organizations are on the front lines everyday serving those most in need in our communities. Their first-hand knowledge, expertise and experience is invaluable when faced with a variety of challenges. By exploring public-private partnerships through open, honest and respectful dialogue, we seek to identify opportunities to address and meet these challenges.

Each Challenge Discussion will be facilitated by an expert in that area.

### Education



MIKE  
KLOCKE

### Homelessness



ANTHONY  
BARKETT

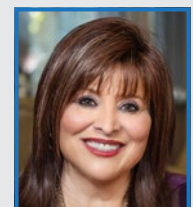


JOHN  
MENDELSON



KATHY  
MILLER

### Affordable Housing



CAROL  
ORNELAS



CHANGE THE WORLD



WITH A GIVING HEART

**National Philanthropy Day®**

## NATIONAL PHILANTHROPY DAY AWARDS

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

### OUTSTANDING PHILANTHROPIST:



#### **Stokes Family**

Since 1919 the Stokes family (parents Tom and Sandy; children Sharon, Bill and Mike) has farmed, lived and served Thornton and surrounding areas. They

believe in feeding your roots and investing in community. The Stokes model is ideal by investing their time, talents and financial support in Thornton and the surrounding communities.

Sharon and Sandy Stokes are founding members of Hospice of San Joaquin's Butterfly Auxiliary, and have been instrumental in the growth and success of the auxiliary chapters. Sharon is involved in more non-agricultural activities. She has served the Thornton Community Center Advisory Council (a different organization than her brother, Mike, serves on. The community center council is a seven-member group serving the needy in Thornton and western Acampo); United Cerebral Palsy board; treasurer for the county chapter of Guitars Not Guns; member of Hospice of San Joaquin's Butterfly Auxiliary; treasurer of the Woodbridge Grange; and active 4-H and Vinewood Community Church in Lodi.

Bill is on four local boards - the Woodbridge Irrigation District; Reclamation District 348; the Thornton Rural Fire District; and the Community Business Bank.

### OUTSTANDING VOLUNTEER FUND RAISER:



#### **Duane Isetti**

Duane has served this community in too many ways to count – as a lifelong parishioner of Annunciation Cathedral, graduate of St. Mary's High School and University of the Pacific, Stockton City Councilman, coach, mentor, board member, volunteer, employee, manager and friend. He's a natural leader and steps up to serve in numerous ways.

Many local organizations, governmental entities, schools and service clubs have benefitted from Duane's dedicated service. A few of those standouts are: St. Mary's High School (student, coach, parent, donor, volunteer), University of the Pacific and Pacific Athletic Foundation (student athlete, volunteer, staff, PAF board member, parent and donor), Stockton Athletic Hall of Fame (volunteer, awardee), United Way of San Joaquin County (board member, legacy donor), Rotary Club of Stockton (member), and Community Foundation of San Joaquin (founder, board president, donor).

For more than fifteen years before it was established, Duane Isetti worked tirelessly to convince local leaders that our region needed and deserved to have a community foundation. In late 2007 the time was right and the Community Foundation of San Joaquin was born.

Ask anyone who has ever received a call or visit from Duane Isetti for support for a local nonprofit and they will tell you he's one person you just can't turn down. His secret? It's simple, but profound – he CARES about this community and its residents.

**The Association of Fundraising Professionals (AFP) California Capital Chapter San Joaquin Extension**

## NATIONAL PHILANTHROPY DAY AWARDS COMMITTEE

### **Diane Vigil, CFRE**

Chairperson, Dameron Hospital Foundation

### **Georgette M. Hunefeld**

Director of Principal and Leadership Giving  
University of the Pacific

### **Ray Call**

Owner  
True North Solutions

### **Wayne Craig**

President/CEO  
Lodi Memorial Hospital Foundation



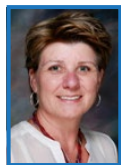
**Scott G.  
Beattie**



**Scott  
Biedermann**



**Melissa  
Flores**



**Renee  
Hall**



**John  
Ledbetter**



**Daryl  
Petrick**



**Colleen  
Stewart**



**Diane  
Vigil**



**Moses  
Zapien**

## COMMUNITY PHILANTHROPY SUMMIT COMMITTEE