



DONORS FORUM OF SOUTH FLORIDA

A 15-year Retrospective

ANNUAL REPORT 2003

Prepared for the 15th Annual Meeting
December 11, 2003



Fifteen Years: **A FOREWARD**

Anniversaries present the opportunity to reflect on the past, but more importantly, to envision the future. That time is now as we celebrate the 15th anniversary of Donors Forum of South Florida.

In 1988, Miami Donors Forum opened its doors with eight members and Robin Reiter-Faragalli, then executive director of Southeast Bank Foundation, as its founding president. Formed in response to the work of the Corporate Responsibility Committee of the Greater Miami Chamber of Commerce, the Forum then was composed primarily of corporate members, but included from the beginning individual donors. It was Miami focused --not yet stretching beyond the county borders.

Corporations and individual donors were the dominant philanthropic resources in Miami in the late 1980's. The John S. and James L. Knight Foundation, now the largest foundation in Florida, was in Akron, Ohio (it relocated in 1990); Doctors, Cedars, North Shore, Good Samaritan, St. Mary's, Kennedy and St. Francis hospitals were nonprofit health care providers and many leading entrepreneurs were building companies rather than foundations. The "Golden Age of Philanthropy" had not begun and only a small group of corporate leaders thought regionally. What a difference these past 15 years have made in the development of the philanthropic infrastructure of our region.

South Florida (Monroe, Miami-Dade, Broward and Palm Beach) is now the fifth fastest growing region for foundations in the country. Since 1996 alone, 669 foundations with more than \$2.14 billion in assets have been created. They have propelled the Forum's growth and contributed critical resources and leadership to the nonprofit sector.

Individuals continue to account for most philanthropy – more than three-quarters of all giving – so Donors Forum's inclusion of individual donors from the outset was a good predictor of the future. Many of the new foundations represent the decision by charitable individuals to endow and make permanent their philanthropy.

South Florida's philanthropic structure has also grown as hospitals were sold and their assets put into foundations; entrepreneurs shared their wealth and knowledge philanthropically; sports teams and athletes got involved with the community; and companies prospered. Health Foundation of South Florida (Cedars), Dr. John T. Macdonald Foundation (Doctors' Hospital), North Dade Medical Foundation (North Shore), Allegany Franciscan Foundation (St. Francis and St. Mary's), Quantum Foundation (JFK Medical Center) and Palm Health (Good Samaritan), all created since the mid-1990's, have made grants totaling over \$100 million.

As we review Donors Forum's major accomplishments, several initiatives stand out:

- **Promotion of Philanthropy:** A South Florida Collaboration was launched in 1998 to facilitate the creation of new foundations, focus their work and connect them to the local community.
- **Philanthropy and the Black Church** was a project that Donors Forum that spanned from 1996 through 2003 connecting foundations and corporate giving programs with black churches providing health and human services in the inner-city. It was Donors Forum's first collaborative funding effort.
- **Promoting regionalism** as one of the only private-sector entities with a regional presence and one that recognized the importance of regional strategies to deal with many of South Florida's most pressing issues.
- **Developing a research division** that generated region-specific information on philanthropy in South Florida, promoting dialogue and discussion.
- **Focusing on building the capacity** of the nonprofit sector, an emphasis that led to the creation of a new nonprofit resource center—C•One—in Miami and a regional network of such entities.
- **Integrating public policy work** into its efforts.

If all this could happen in 15 years: What do the coming decades hold in store for Donors Forum of South Florida?

- **Beyond our Borders:** Donors Forum's research documents the flow of philanthropic dollars from South Florida to other parts of the country and abroad. We can expect, especially when there are changes in Cuba, that there will be even more international philanthropy and a need to help develop new skills and strategies to work across borders.
- **Regional strategies:** Collaborations to address poverty, water shortages, education, transportation, affordable housing and arts and culture will become even more important. Donors Forum can and should be a force to promote their development and implementation.
- **Civic Engagement:** Increasingly, public policy involvement is a part of philanthropic work. Donors Forum is an important voice and force for increased attention to civic engagement in the region.
- **Public Disclosure:** There will continue to be media and governmental attention to foundations and nonprofits, increasing awareness of the large influence of the sector. This provides an opportunity and need for Donors Forum to be a voice for effective philanthropy.

Donors Forum celebrates its 15th anniversary with more than 125 members, reflecting the diversity of South Florida's philanthropy. Its legacy includes many of those original founding members and their next generations. Our past is indeed prologue for the future.

Mary Riedel
Board Chair

Jo Anne Chester Bander
President & CEO

FIFTEEN YEARS AT A GLANCE:

1988-1993

1988

Donors Forum begins operations with Marilyn Gladstone as its first executive director and eight members, housed at Dade Community Foundation.

1989

Donors Forum holds its first annual members meeting with James Joseph, president of Council on Foundations, its guest speaker.

1989

Donors Forum co-sponsors an Immigration Forum with United Way and publishes major resource guide as a result.

1990

Knight Foundation moves to Miami from Akron, Ohio.

1991

Donors Forum adopts a new mission statement, expanding and clarifying its purpose.

1991

Donors Forum publishes a *Directory of Nonprofit Organizations* in Miami.

1992

Doctors' Hospital is purchased by a for-profit corporation, transferring assets to the Dr. John T. Macdonald Foundation to make it a \$13.5 million grantmaking foundation, the largest conversion foundation in the region.

1992

Hurricane Andrew devastates Miami-Dade County. Community leaders respond by establishing We Will Rebuild and raising more than \$20 million for relief and restoration efforts. Donors Forum responds by convening funders and the nonprofit communities; serves as a source of referral for funders from other parts of the country.

1993

Health Foundation of South Florida is established with half the assets from the sale of Cedars Medical Center.

1993

Donors Forum publishes edition three of *Miami Profiles*, assuming responsibility from the Greater Miami Chamber. It has 59 Profiles.

1993

Marilynn Gladstone retires after building the Forum to a membership of 46 members and Gwendolyn High is named second executive director.



FIFTEEN YEARS AT A GLANCE:

1994-1998

1994

Under the direction of President Sharon Clark, Donors Forum undergoes a transition phase evaluating its role in the community, the geographic boundaries of its community and whether or not to continue operations.

1995

Jo Anne Chester Bander is named the third executive director with the mandate to take Donors Forum regional. It opens its first independent office and becomes The Donors Forum, Inc. with the tag A Regional Association of Grantmakers Active in South Florida.

1995

Donors Forum helps introduce the Annenberg Foundation initiative to revitalize public education to the local funding community.

1996

Donors Forum participates for the first time in Regional Associations on the Hill, with its executive director and board president making three Congressional visits.

1996

Donors Forum, with leadership by American Express, organizes the *Positive Power of Women and Philanthropy*, the first regional conference on women and philanthropy and holds it in Broward.

1996

Quantum Foundation, Inc. is organized in Palm Beach County with the proceeds of the sale of JFK Medical Center and becomes the largest conversion foundation in the region with over \$100 million in assets.

1996

The Annenberg Foundation selects South Florida as the site of one of its major regional programs, with a commitment of a \$33.4 million challenge grant to match an equal amount of local private funds and local school board funds for a total \$100 million initiative.

1996

Donors Forum produces the first edition of *South Florida Capital and Endowment Campaigns*

1997

Donors Forum, with partner National Office of Philanthropy and the Black Church, organizes *Philanthropy and the Black Church: Building Community Through Partnerships*.

1998

In collaboration with nine other philanthropic organizations, Donors Forum convenes *South Florida's Hispanic Philanthropy Conference* to increase awareness and understanding of the region's diverse Hispanic population

1998

Donors Forum organizes a Congressional reception at Florida House on Capitol Hill for the Florida attendees of the Council on Foundations annual conference with seven members of Congress participating

1998

Donors Forum celebrates its 10th anniversary with 88 members representing the Dade, Broward, Monroe and Palm Beach philanthropic community.



FIFTEEN YEARS AT A GLANCE:

1999-2003

1999

Donors Forum receives planning grant from New Ventures in Philanthropy to explore a promotion of philanthropy initiative.

1999

Donors Forum organizes its first collaborative funding effort through its Philanthropy and the Black Church project inviting inner-city church collaborations to submit proposals using a common application form. Eight members ultimately make 18 separate grants totaling over \$160,000.

1999

Donors Forum produces *South Florida Gives*, a first-ever look at the philanthropic infrastructure of the region.

2000

Donors Forum launches Promotion of Philanthropy: a South Florida Collaboration, a project of New Ventures in Philanthropy, as a collaboration of 16 local and national partners and moves offices to accommodate an increase in staff and activity.

2000

Donors Forum is one of five regional associations of grantmakers selected by Burness Communications and the Urban Institute to participate in a two-year media project to strengthen member skills in telling "the foundation story".

2000

Donors Forum launches its first web site designed from inception to be an interactive online forum and portal to organized philanthropy.

2001

The Donors Forum officially changes its name to Donors Forum of South Florida, a direct result of the Vision 2004 strategic planning process and bylaws revisions, which move the Forum into corporate form, with an elected Board Chair and appointed President & CEO.

2001

W.K. Kellogg Foundation awards Donors Forum a grant of \$40,000 to train grantmakers and their grantees around the state on issue advocacy related to devolution and access to health care.

2001

Donors Forum supports the work of a collaborative of five members who organize and launch a new nonprofit resource center in Miami-Dade, Center on Nonprofit Effectiveness, C•One and, as a related product, develops *Strengthening Nonprofits Regionally*, a resource guide.

2002

Donors Forum has a communication intern from Grupo de Fundaciones in Argentina, the first such interchange through W.I.N.G.S., an international association of regional associations of grantmakers.

2002

Donors Forum releases *Foundations in Uncharted Waters*, a first look at the implications of the shift downward in the assets of many foundations following the rapid growth beginning in the mid-90's.

2003

Donors Forum publishes edition nine of *Profiles of South Florida Donors*, the first offered in CD- Rom format, with 174 profiles. Only 27 are the same as those in edition three in 1993.

2003

Donors Forum organizes a delegation of 18 for Foundations on the Hill and completes visits to all 27 Senate and House offices, meeting with 12 of the Florida delegation.

2003

Donors Forum produces with Quantum Foundation leadership and support *Private Sector Funding of Health and Human Services: Implications for Strategies to Increase Revenue Maximization*, which is used by its Regional Policy Network as background for a successful statewide effort to pass revenue maximization legislation.

2003

Donors Forum organizes with the three nonprofit resource centers in the region a special symposium, *Collaborating to Foster Civic Engagement*.

2003

Donors Forum celebrates its 15th anniversary with over 125 members, says goodbye to Jo Anne Chester Bander, its CEO since early 1995, and welcomes its fourth CEO Scot Marken, to start January 1, 2004.

FIFTEEN YEARS: *Over Fifty Voices*

Donors Forum has prided itself in presenting to its members the leading practitioners, thinkers, advocates and policy makers of the philanthropic sector. Since 1998 we have been privileged to host:

Emil Angelica
Amherst Wilder Foundation

Nan Aron
Alliance for Justice

Diana Aviv
Independent Sector

Thomas Backer
Human Interaction Research Institute

Dr. Edmund Burke
The Center for Corporate Responsibility of
Boston College

Susan Berresford
The Ford Foundation

Elizabeth T. Boris, Ph.D.
The Urban Institute

Diana Campoamor
Hispanics in Philanthropy

Hodding Carter III
John S. and James L. Knight Foundation

Rick Cohen
National Committee on Responsive
Philanthropy

Paul Connolly
The Conservation Company

John Coy
The Consulting Network

Mayor Manny Diaz
City of Miami

Marian Wright Edelman
Children's Defense Fund

John Edie, Esq.
Council on Foundations

Virginia Esposito
National Center for Family Philanthropy

Eli Evans
Charles H. Revson Foundation

Jonathan Fanton
John D. and Catherine T. MacArthur
Foundation

Rev. Dr. Robert Franklin
Interdenominational Theological Seminary

Olga Garay
Doris Duke Charitable Foundation

Tracy Gary
Resourceful Women

Kelin Gersick
Lansberg Gersick & Associates

Paul Grogan
Boston Community Foundation

Jon Hage
Charter Schools USA

Peter Goldberg
The Prudential Foundation

Judith Healey
Consultant

Denice Rothman Hinden
Management Performance Concepts

The Honorable Glenda Hood
Florida Secretary of State

Harold "Bud" Hodgkinson
The Institute for Educational Leadership

Dorothy Johnson
Council of Michigan Foundations

Steve Johnson
The Philanthropic Initiative

James Joseph
Council on Foundations

Bruce Katz
The Brookings Institute

Mark Kramer
The Center for Effective Philanthropy

Dr. Michael Krop
Miami-Dade County School Board Chair

David Lawrence
The Early Childhood Initiative Foundation

Judge Cindy Lederman
Miami Circuit Court

Christine Letts
Harvard University

Jack Levine
Voices for Florida's Children

Stanley Litow
IBM Foundation

Michael Litz
Benton Foundation

Tom Lynch
Palm Beach County School Board Chair

Ed Martenson
National Arts Strategy

David Matthew
Kettering Foundation

Roy Miller
Florida Children's Campaign

Richard Mittenthal
The Conservation Company

Barbara Morrison-Rodriguez
BMR Consulting Services

Manuel Pastor
Center for Justice, Tolerance and
Community, UCSC

Michael Quinn Patton
Consultant

Barrie Pribyl
Consultant

Susan Crites Price
Author

Tony Proscio
Author

Ellen Remmer
The Philanthropic Initiative

Dorothy Ridings
Council on Foundations

Rev. Eugene F. Rivers III

William Ryan
Harvard University

Michael Seltzer
Ford Foundation consultant

The Honorable E. Clay Shaw
U.S. House of Representatives

Gary Stern
Consultant

Susan Kenny Stevens
Larson Stevens

Terrie Temkin, Ph.D.
NonProfit Management Solutions, Inc.

Dave Thomas
Wendy's International, Inc.

Colburn Wilbur
David and Lucile Packard Foundation

Gary Yates
California Wellness Foundation

FIFTEEN YEARS: *Publications*

BUILDING A BETTER SOUTH FLORIDA: CHARITABLE GIVING BY GAY PEOPLE

July, 2000

This publication explored the nature and extent of support gay men have provided to charitable organizations in the region.

THE CORPORATE GIVING OF HISPANIC-OWNED COMPANIES IN MIAMI-DADE

September, 1999

This special report was produced by Promotion of Philanthropy - A South Florida Collaboration (POP) of the Donors Forum in partnership with the Hispanic Business Group of the Greater Miami Chamber of Commerce. This report documents, for the first time ever, the actual level and nature of Hispanic corporate involvement.

A DECADE OF PHILANTHROPY IN SOUTH FLORIDA 1988-1998

November, 1998

DEVELOPING A GIVING PROGRAM IN HISPANIC-OWNED COMPANIES

Spring, 2002

This publication was designed to assist Hispanic corporate leaders of medium to small companies to create a giving program.

DIRECTORY OF NONPROFIT ORGANIZATIONS, 1991

This publication was a directory of nonprofit organizations in Miami-Dade County.

FOUNDATIONS IN UNCHARTED WATERS: THE CHALLENGES OF 2000

December, 2002

This report updates *South Florida Gives* foundation data based on year-end 2001 IRS information.

HOW FLORIDA FUNDERS ARE ADAPTING TO WELFARE REFORM AND THE RESPONSIBLE FATHERHOOD MOVEMENT

This report was designed to collect and analyze information about private efforts to support initiatives that engage fathers in the raising of their children.

PROFILES OF SOUTH FLORIDA DONORS

Editions 3-9, 1993-1997

Profiles documents the giving philosophy and criteria of companies and foundations who fund in South Florida; provides contact information for each grantmaker; and has information on how to write strong proposals, how funders evaluate proposals, web sites of use to nonprofits, and other resources for fundraisers.

NEWS FROM DONORS FORUM

Winter, 1995 through present

The quarterly newsletter provides information on current developments in the grantmaking community, trends in philanthropy, programs and workshops, grants awarded and recent publications/studies from various philanthropic and research organizations.

A PHILANTHROPIC FORCE: NEW FOUNDATIONS IN SOUTH FLORIDA

November, 2003

This report is a first-ever look at the 669 new foundations and over \$2 billion in new philanthropic capital of the region.

SOUTH FLORIDA GIVES: A COMPREHENSIVE REPORT ON THE STATE OF PHILANTHROPY IN PALM BEACH, BROWARD, MIAMI-DADE AND MONROE COUNTIES

November, 1999

This is the first major report of its kind to compile, present, and analyze regional giving data, documenting important trends and patterns in South Florida philanthropy.

SOUTH FLORIDA GIVES: THE STATE OF PHILANTHROPY IN PALM BEACH, BROWARD, MIAMI-DADE AND MONROE COUNTIES

December, 2001

This report builds upon the 1999 edition and adds an in-depth look at the flows of grant dollars in and out of Florida and the use of grant funds.

STRENGTHENING NONPROFITS REGIONALLY

November 2002

A first-ever look at resources to assist the nonprofit sector.

SURVEY OF SOUTH FLORIDA CAPITAL AND ENDOWMENT CAMPAIGNS

Editions 1-4, 1996-2002

First issued in 1996, this publication, produced in even number years, is in its fourth edition. The report documents current and anticipated capital and endowment fundraising campaigns by nonprofit organizations in Miami-Dade, Broward, Palm Beach and Monroe counties.

SUMMARY REPORT OF SOUTH FLORIDA'S HISPANIC PHILANTHROPY CONFERENCE

February, 1998

This report highlights the major discussions and presentations at the January 29, 1998 conference on topics ranging from the myths and possibilities in Hispanic philanthropy; the role of advisors; fundraising basics; and the elements of a successful corporate giving program.

PRIVATE SECTOR FUNDING OF HEALTH AND HUMAN SERVICES: IMPLICATIONS FOR STRATEGIES TO INCREASE REVENUE MAXIMIZATION

March, 2003

FIFTEEN YEARS: *Fifteen Accomplishments*

FROM 1988 THROUGH 2003, DONORS FORUM OF SOUTH FLORIDA HAS:

- Built an active network of over 125 family, independent, corporate and public foundations; corporate giving programs; individual donors; and associations and organizations with charitable contributions programs that facilitates collaborative approaches to grantmaking in South Florida.
- Developed a network of black church leaders and philanthropic leaders through our Philanthropy and the Black Church Project who work together to address the needs of underserved inner-city neighborhoods.
- Designed and implemented Promotion of Philanthropy: a South Florida Collaboration, which engaged fifteen local and national partners in assisting to create many new foundations and philanthropic funds and developing strategies that can be used into the future to encourage and support the development of new philanthropic funds in the region.
- Held multi-sector conferences focusing on Women's Philanthropy, Hispanic Philanthropy and Civic Engagement.
- Built a support group of Professional Advisor Associates that includes some of the region's most experienced lawyers, accountants and financial advisors and helped those experts to understand the long-term impact and issues faced by those who create philanthropic funds and foundations.
- Developed an active publications and research program that produces on a regular cycle *Profiles of South Florida Donors*, *Capital and Endowment Campaigns in South Florida* and *News from Donors Forum*, our quarterly newsletter.
- Conducted nationally recognized cutting-edge and topical research and issued definitive reports on the nature and extent of philanthropy in the region, the philanthropy of such key sectors as Hispanic-owned businesses, capacity-building in the region and public policy issues such as revenue maximization.
- Promoted the growth of new philanthropy by providing resources to individuals and those who advise them on the various vehicles for charitable giving, and actively seeking out those positioned to create new funds and foundations to offer support.
- Created and continuously enrich a web site that serves as a portal for information on regional philanthropy and links to resources on philanthropy throughout the world, with a Members Only section that has a searchable member directory, library and extensive downloadable sample forms, policies and procedures manuals and other materials for grantmakers.
- Established and maintain a comprehensive, professionally managed lending and research library on all aspects of philanthropy, foundation management and grantmaking—one of only three regional associations with a librarian who is affiliated with the Consortium of Foundation Libraries.
- Offered a full array of professional development, educational, training and networking opportunities—some 50 a year—throughout the region, featuring both local experts and the leading national thinkers, practitioners and strategists on effective philanthropy.
- Served the media as a resource with unbiased, current information on philanthropy in the region and philanthropic trends throughout the country in response to media inquiries and by releasing timely, accurate and region-specific studies and reports.
- Defended foundations and corporate giving programs from federal legislation that would limit their development and resources and promoted supportive legislation through organizing and supporting a major delegation each winter on Capitol Hill; sending member alerts on Congressional action; and arranging opportunities to meet with South Florida's Congressmen and their staff.
- Fostered public policy engagement by private funders at the state and local level to promote access to health care, the Earned Income Tax Credit, revenue maximization and other issues through developing expertise in issue-oriented advocacy and creating a regional policy network.
- Facilitating the funder collaborative that created a new nonprofit resource center in Miami-Dade, C•One, and then working collaboratively with the three nonprofit centers and funders in the region on strategies to build the capacity of South Florida's nonprofit sector.

Fifteen is a short time in the life cycle of organizations, but significant in a region where the only constant is change. There is every reason to expect fifteen years of successes to serve as prologue to even greater accomplishments and impact.

2003 PROGRAMS

ARTS/CULTURE/HUMANITIES/EDUCATION

- National Alliance of Urban Literacy Coalition with Margaret Doughty
- Quality Teachers, Quality Education
- Managing Change: Challenges to Arts and Culture Groups with Edward Martenson
- Sustaining Arts Funding
- Public Education: A Conversation with School Board Chairman Tom Lynch, Palm Beach
- Public Education: A Conversation with School Board Chairman Dr. Michael Krop, Miami
- Helping Hispanic Students Succeed with Hispanic Scholarship Fund

CAPACITY BUILDING

- A Conversation with Paul Vendevert, Community Partners, Inc.
- Preparation for the What Ifs: A Briefing with American Red Cross

CORPORATE ROUNDTABLES AND SEMINARS

- Community Involvement & Good Corporate Citizenship
- Strategic Planning
- Corporate Citizenship, the Business Imperative & the Entrepreneurial Nonprofit with the Center for Corporate Responsibility of Boston College
- The Corporate Foundation as a Vehicle for Philanthropy
- Corporate Giving and the Law: A Video Conference featuring John Edie, Esq.
- Strategic Corporate Contributions

FAMILY FOUNDATION ROUNDTABLES

- Living the Legacy: The Value of Family Philanthropy
- Family Values/Family History
- Interpersonal Dynamics in Philanthropic Families with Valerie Jacobs, MSW
- Family Ties: The Family Foundation Network

HEALTH/HUMAN/SOCIAL SERVICES/COMMUNITY DEVELOPMENT/HOUSING/ENVIRONMENT

- Privatization of Foster Care (Miami and Broward)
- An Update & Next Steps on Privatization of Foster Care, Miami

- The Youth Movement: Involving Youth as Grantmakers with Council of Michigan Foundations
- Conversation with the Honorable Carrie Meek
- Conversation with Dr. Joe Greer, Access to Health Care at the Overtown Youth Center

PROMOTION OF PHILANTHROPY/ADVISOR ASSEMBLIES/GENERAL INTEREST

- Community Conversations (Miami, Broward and Palm Beach)
- Collaborating to Foster Civic Engagement: A Symposium featuring Secretary of State Glenda Hood and Diana Aviv, Independent Sector
- Foundations on the Hill
- Faith with Works Conference: Philanthropy and the Black Church
- Philanthropy Before Hours: Breakfast at Fairchild
- Philanthropy After Hours: Winning with the Marlins
- Fifteenth Annual Meeting of the Members with Dorothy S. Ridings, President, Council on Foundations, and Hodding Carter III, President, John S. & James L. Knight Foundation

TOOLS FOR EFFECTIVE GRANTMAKING

- Association of Small Foundations Regional Meeting
- How To Conduct A Site Visit
- Alternative Investments (Miami and Palm Beach)
- Systems That Work: Understanding Forms & Grant Applications
- Indicators of Effectiveness: Understanding & Improving Foundation Performance with Phil Buchanan
- International Grantmaking with Council on Foundations
- Projects for Sustainability & Replication with Thomas Backer (Miami and Palm Beach)
- Building and Sustaining Effective Collaborations with Amherst Wilder Foundation
- Scaling Up Successful Works
- Self-Assessment Tools for Strategic Planning with Denice Rothman Hinden
- The Venturesome Donor: A Workshop on High Impact Philanthropy with The Philanthropic Initiative
- How Effective Nonprofits Work with Terrie Temkin, Ph.D. (Miami, Broward and Palm Beach)

2003 YEAR 15

In 2000, the Board of Donors Forum approved and presented to the membership *Donors Forum 2004: A Strategic Vision*. We are reporting on 2003 in light of goals established back in 2000.

GOAL I

To Strengthen Philanthropy in South Florida through presenting at locations throughout the region a comprehensive range of programs and services designed to give funders of all levels of experience the skills and knowledge needed to be effective in their philanthropy and opportunities to network with peers.

Collaboration was the program focus in 2003. This theme was carried out through 52 skills-building programs, issue briefings, and a Senior Seminar, *Building and Sustaining Effective Collaborations*. Many nationally recognized authorities (a full listing of programs and speakers is on p.9) facilitated or presented. Group learning opportunities were reinforced and supplemented with publications and sample materials available from the Donors Forum library and website. Donors Forum collaborated with the three nonprofit resource centers of South Florida to present a symposium on civic engagement; the Association of Small Foundations to present a trustee leadership seminar; Jewish Funders Network on a networking reception; and Southeastern Council of Foundations on a legal briefing by videoconference for corporate foundations.

GOAL II

To Increase and Diversify Philanthropy in South Florida through encouraging the growth of new philanthropy; moving from Promotion of Philanthropy (POP) to an ongoing outreach and support system for new philanthropists; increasing membership to a stable base of at least 125 by 2004; and making affiliation appealing to Professional Advisors.

Donors Forum continued to promote philanthropy as part of its core offerings through activities such as the collaborative workshop with Association for Small Foundations geared to new foundations; outreach and encouragement to new foundations in the region to participate in ongoing Donors Forum activities; development of new marketing materials for foundations and professional advisors; and placement on the web site of sample forms and procedures and links specifically intended to

help emerging funders. Deborah Bussel was named one of the first New Ventures in Philanthropy Fellows and chose as her focus the completion of the series *Giving in the Jewish Tradition*. The curriculum is being developed with CLAL, with Bussel responsible for the philanthropic practice sections; the pilot series is scheduled for early 2004 in Boca Raton and Miami. Deborah Bussel and Jerry Chasen, Esq., continued to develop and present to national audiences the professional advisor philanthropy training program developed through POP. The Forum developed new marketing materials showcasing itself as the place for Professional Development and Training, Networking, Information and Collaboration and used them to recruit 19 new members, ending the year with 128 members and 14 Professional Advisors.

GOAL III

To Provide Leadership and Support for Grantmakers Working Collaboratively at the Local Level on Philanthropic Issues and Activities through fostering exchange of information between and among funders and nonprofits on issues of effectiveness; creating opportunities for substantive conversations with the nonprofit sector; holding regular roundtable discussions on themes that require collective action; supporting member collaborations and the Philanthropy and the Black Church Project; and playing a leadership role on issues of regional impact.

With the program theme of Collaboration for 2003, Donors Forum completed the formal phase of its Philanthropy and the Black Church Project with its June *South Florida Faith with Works Conference* and brought a cross-sector group together on September 24th for *Collaborating to Foster Civic Engagement*. It released *Profiles of South Florida Donors 2003-2004* at Meet the Grantmaker workshops in Miami-Dade, Broward and Palm Beach. The visit of the Amherst Wilder Foundation for the June Senior Seminar was coordinated with the Broward County Cultural Division, C•ONE and Community Foundation of Broward Nonprofit Resource Center so that the nonprofit community had similar training and conversation. Its new website, launched in March, has a public calendar to foster collaborations between sectors.

GOAL IV

To Provide Leadership and Support in Communicating about Philanthropy by establishing itself as the reliable focal point in South Florida for information and materials about South Florida philanthropy; generating media stories that highlight effective philanthropy; and helping members develop communications skills and strategies.

Throughout 2003 Donors Forum fielded calls from media and responded with information, quotes and referrals to members highlighting effective philanthropy in the region. A *Philanthropic Force: New Foundations in South Florida* led to feature stories in print and electronic media throughout the region and nationally.

GOAL V

To Provide Leadership and Support in Public Policy Efforts Important to the Philanthropic Community through engagement in advocacy and public policy at the federal and state levels and around issues of regional impact; use of its research to promote action; and work to promote statewide networks of funders.

Donors Forum has been a consistent source of information about federal charitable legislation. In 2003 this meant organizing a delegation of 18 for Foundations on the Hill; visiting all 27 Congressional offices; and encouraging and assisting member efforts to pass an appropriate version of H.R. 7, the House version of the Senate-passed CARE Act. State level work focused on revenue maximization through two mechanisms, advocacy around the Local Funding Revenue Maximization Act, which passed the Florida Legislature in the 2003 session, and the Greater Miami Prosperity Campaign, with the goal of increasing the use of the Earned Income Tax Credit (E.I.T.C.). Assisting with the campaign for the revenue maximization legislation was Donors Forum's study, produced with the leadership and funding of Jeanette Corbett of Quantum Foundation, *Private Sector Funding of Health and Human Services: Implications for Strategies to Increase Revenue*. The Forum, through its Regional Action Network and leadership of Barbara Garrett, Applica Inc., is also supporting the effort to move what is now the South Florida Prosperity Campaign state-wide. Privatization of Foster Care has been a major focus of issue briefings.

2003 MEMBERS & ADVISORS*

MEMBERS

Arthur F. & Alice E. Adams Charitable Foundation
 Clark & Carolyn Adams Foundation
 Samuel I. Adler Family Supporting Foundation
 Alan & Jayusia Bernstein*
 Allegany Franciscan Foundation
 Alpha-1 Foundation
 American Express
 Louis J. Appignani Foundation, Inc.
 Applica
 The Assurant Group/ABIG Foundation
 AutoNation, Inc.
 Bank of America
 BankAtlantic Foundation
 The Herbert Bearman Foundation, Inc.*
 The Frank Stanley Beveridge Foundation, Inc.
 The Blue Foundation for A Healthy Florida
 The Walter and Adi Blum Foundation, Inc.*
 The Shepard Broad Foundation, Inc.
 Broward County Cultural Division
 Edyth Bush Charitable Foundation
 Calder Race Course
 Carnival Cruise Line Foundation
 The Annie E. Casey Foundation
 The Alvah H. and Wylene P. Chapman Foundation
 Children's Services Council of Broward County*
 Children's Services Council of Palm Beach County
 Citibank, a member of Citigroup
 Citrix Systems, Inc.
 Evelyn and Norman H. Cohan
 The Manny & Ruthy Cohen Foundation
 James M. Collins Foundation
 The Columbine Foundation, Inc.
 Community Foundation of Broward
 Community Foundation of the Florida Keys
 Community Foundation for Palm Beach and Martin Counties
 Coral Gables Community Foundation
 Coral Gables Congregational Church
 Cordis, a Johnson & Johnson company
 Wallace H. Coulter Foundation
 Council for Educational Change
 Dade Community Foundation, Inc.
 P.L. Dodge Foundation, Inc.
 Dunsbaugh-Dalton Foundation
 Jessie Ball duPont Fund
 Education Foundation of Palm Beach County
 The Education Fund
 Fiduciary Trust International of the South
 The Fisher Cummings Foundation*
 Flight Attendant Medical Research Institute, Inc.
 Florida Marlins Community Foundation*
 Foundation of Jewish Philanthropies of the Greater Miami Jewish Federation, Inc.
 William Fox, Jr. Foundation
 Sam & Lottie Friedland Charitable Foundation, Inc.

Friedman-Klarreich Family Foundation
 Gay & Lesbian Foundation of South Florida
 Mark J. Gordon Foundation*
 The Gordon Family Foundation
 Greater Miami Local Initiatives Support Corporation
 Green Family Foundation
 Merrill G. and Emita Hastings Foundation
 Health Foundation of South Florida
 The A.D. Henderson Foundation, Inc.
 Holland & Knight LLP
 The Herbert W. Hoover Foundation
 The Catherine Horden Family Trust
 I Have A Dream Foundation (Miami Based)
 The Alma Jennings Foundation, Inc.
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