



**2014-2015 Season**  
 Russell Goldstein, President  
 Frank Bourget, Vice President  
 Claudia Cucitro, Treasurer  
 Lindsey Jackson, Secretary

**2015 Summer Forum \_Sponsorship Committee Call  
 December 9, 2014 - 9:00am**

**Committee members**

| RSVP/Regret | Committee Members  | SF Committee Focus            | Organization  | Email/Phone  |
|-------------|--------------------|-------------------------------|---|--|
| RSVP        | Diane Jezek-Powell | Sponsorships Chair            | Gomper's Habilitation Center                        | <a href="mailto:Djezek-powell@gomperscenter.org">Djezek-powell@gomperscenter.org</a><br>602-283-3931                 |
| Regret      | Liz Kaplan         | Sponsorships - Co-chair       | Arizona Coyotes Foundation                          | <a href="mailto:Liz.Kaplan@arizonacoyotes.com">Liz.Kaplan@arizonacoyotes.com</a><br>623-772-3356                     |
|             | Tiffany House      | Sponsorships Committee Member | MasterTech Financial                                | <a href="mailto:tiffany@mastertechfinancial.com">tiffany@mastertechfinancial.com</a><br>480-905-3260<br>480-242-9956 |
|             | Russell Goldstein  | PGRTAZ President              | US Trust, Bank of America Private Wealth Management | <a href="mailto:Russell.goldstein@ustrust.com">Russell.goldstein@ustrust.com</a><br>602-523-2924                     |
| RSVP        | Stephanie Weadock  | Administrative Support        | Premium Organization                                | <a href="mailto:info@pgrtaz.org">info@pgrtaz.org</a><br>602-840-2900   |

**\*Attachment included**

**9:00am: Opening round**

- Time restraints
- Approve/amend agenda

**Action Items:**

| Assigned | Action Items  | Target Due Date |
|----------|---|-----------------|
| Russell  | Reach out to Cresendo for a possible sponsorship  | 12/9/2014       |
| Diane    | Tailor sponsor appeal notice and create outlook distribution list using Russ' personal list of contacts for Russ' use | 12/3/2014       |
| Russ     | Forward sponsor appeal notice to personal list of contacts  | 12/5/2014       |
| Diane    | Tailor/forward sponsor appeal notice for committee use  | 12/3/2014       |

**Agreed agenda (Stephanie)**

Longer breaks for networking; longer sessions; one less breakout

|  |
|--|
| 7:30am-8am: Registration   |
| 8am-8:45am: Breakfast ( <b>Inspirational/kick off presentation</b> )                                   |
| 8:45am-9:15am: Community lounge/networking/break   |
| 9:15am-10:30am: Breakouts  |
| 10:30am-11am: Community lounge/networking/break  |
| 11am-12:15pm: Breakouts  |
| 12:30pm-1:30pm: Lunch ( <b>Strategic Philanthropy</b> )  |
| 1:30pm-2pm: Community lounge/networking/break  |
| 2pm-3:15pm: Breakouts  |
| 3:15pm-5:00pm: Closing/reception (3:30-3:45 shout outs, etc) ( <b>PGRTAZ Board member/take aways</b> ) |



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**Tracks (Stephanie)**

- Planned Giving 101 (Two presentations; one repeated)
- Technical/Professional Advisors (Two presentations; one repeated)
- Board/Executive Director; Staff (Three presentations-9:15am = Russ; 11am = Policies; 2pm = Staff)

**2014 Sponsor Renewal Status'\* (Diane)**

- KJZZ/KBACH draft agreement\*
- Goodwill draft agreement\*

**2015 Sponsor Appeals\***

**Target deadlines.**

- Sponsor renewal outreaches and feedback: **11/26/14**
- Begin new sponsorship appeal: **12/1/2014**
- Re-evaluating outreach and determining if we need to expand the asks beyond our current lists: **12/9/2014**
- Deadline to be included on the Save the Date piece: **12/12/14**
  - Draft Save the Date piece\*
- Sponsorship secured and **funds received** to be included in proceedings booklet: **5/11/2015**

**Calendar next call**

**10am: adjourn**