



Partnership News

December 1, 2011

PPP Leadership Institute Accepting Applications

The Partnership for Philanthropic Planning is accepting applications from charitable gift and estate planners who would like to join the inaugural class of its new Leadership Institute. The Leadership Institute is a program that provides education, networking and service opportunities for the nation's most experienced charitable planners. Leadership Institute participants are thought leaders in all fields related to philanthropic planning, who usually serve as teachers and mentors for others. Through the Institute, they will have opportunities to learn from one another and to shape standards and best practices for the gift planning community. Their work in the Institute addresses both the art and the science of charitable planning, focusing on such areas as:

- Current events in tax, trusts and estates law pertaining to philanthropic planning, including consideration of the impact of changes to the tax incentives for charitable giving.
- Enhancements in the art of philanthropic planning and serving family philanthropy in new generations.
- Research and trends in donor attitudes, marketing and messaging by nonprofits, family offices and a dozen other areas as they relate to the field.

Leadership Institute participants will consider ways to bring their ideas and vision to bear on gift planning practice, and to provide leadership, through PPP, to the broad community of philanthropic planners. The Institute has a private group in the PPP e-community, and also meets in-person twice a year. The next meeting is March 4 and 5 in Dallas, TX.

Any PPP member with at least ten years of gift planning experience may apply for acceptance into the Leadership Institute. In addition to tenure in the field, applicants must document their experience with sophisticated charitable planning situations, and their active service to the field and to their own local communities. Those who wish to be considered must be nominated by at least two current Institute participants, and submit an application for peer review. More information on the application and review process is available in the PPP e-community. Click [here](#) to see the application and fact sheet (you will be prompted to log in to the PPP e-community using your last name and PPP ID number in order to follow this link).

The Leadership Institute inaugural class currently includes:

- Jonathan D. Ackerman, Attorney, Law Office of Jonathan Ackerman LLC (Owings Mills, MD)
- Alexandra Pia Brovey, Senior Director, Gift Planning, North Shore-LIJ Health System Foundation (Great Neck, NY)
- Robert F. Buchheit, Assistant VP for Development/Gift Planning, University of North Texas (Denton, TX)
- Joseph O. Bull, Senior Vice President, Community Engagement, Columbus Zoo and Aquarium (Powell, OH)
- Reynolds T. Cafferata, Partner, Rodriguez, Horii, Choi & Cafferata LLP (Los Angeles, CA)
- Marc Carmichael, Publisher, R & R Newkirk & Company (Willow Springs, IL)
- Bryan K. Clontz, President, Bryan Clontz & Associates, LLC (Jacksonville, FL)
- Tom Cullinan, President/Editor, Schola Donum/Planned Giving Today (Elkhorn, NE)
- Pamela J. Davidson, Consultant & Charitable Gift Planner, Davidson Gift Design (Bloomington, IN)
- Laura Hansen Dean, Executive Director of Gift Planning, The University of Texas at Austin (Austin, TX)
- Jill S. Dodd, Attorney, Manatt, Phelps & Phillips, LLP (San Francisco, CA)
- Erik D. Dryburgh, Partner, Adler & Colvin (San Francisco, CA)
- Roger Ellison, Senior Advisor for Philanthropy, West Texas Rehabilitation Center Foundation (San Angelo,

TX)

- Shari M. Fox, Assistant Vice President for Development, University of Michigan (Ann Arbor, MI)
- Joseph E. Hancock, Senior Trust Attorney, Baptist Foundation of Texas (Dallas, TX)
- Johnine R. Hays, Senior Gift Planning Consultant, The Stelter Company (Des Moines, IA)
- Russell N. Howes, Vice President for Legal Affairs, University of Wisconsin Foundation (Madison, WI)
- Heidi B. Jark, Vice President and Manager, Fifth Third Bank, The Foundation Office (Cincinnati, OH)
- Emanuel J. Kallina II, Kallina & Associates (Towson, MD)
- Peter K. Kimball, Executive Director of Gift Planning, Harvard University (Cambridge, MA)
- Cynthia W. Krause, Vice President, Gift Planning, Baylor Health Care System Foundation (Dallas, TX)
- David A. Libengood, Director, Relationship Management, Kaspick & Company (Boston, MA)
- Thomas P. Lockerby, Vice President for Development & Campaign Director, Boston College (Chestnut Hill, MA)
- Betsy Mangone, gift planning consultant (retired) (Lakeland, CO)
- Jerry J. McCoy, Principal, Law Office of Jerry J. McCoy (Washington, DC)
- Anne T. Melvin, Deputy Director, Gift Planning, Harvard University (Cambridge, MA)
- Frank Minton, Senior Advisor, PG Calc (Seattle, WA)
- Kathryn W. Miree, Kathryn W. Miree & Associates, Inc. (Birmingham, AL)
- Marilyn M. Montgomery, Assistant Vice President for Development-Individual Giving, College of the Environment University of Washington (Seattle, WA)
- David Wheeler Newman, Chair, Charitable Sector Practice Group, Mitchell, Silberberg & Knupp LLP (Los Angeles, CA)
- Gary M. Pforzheimer, President, PG Calc (Cambridge, MA)
- Timothy J. Prosser, Relationship Manager / Sr. Consultant, Gift Planning, Kaspick & Company (Saint Louis, MO)
- Dan Rice, Philanthropy Architect, K-Love & Air1 Foundation (Rocklin, CA)
- A. Charles Schultz, President, Crescendo Interactive, Inc. (Camarillo, CA)
- Kathy Sperlak, Legal Editor, R & R Newkirk & Company (Willow Springs, IL)
- Jay Steenhuysen, Steenhuysen Associates (Seekonk, MA)
- Craig C. Wruck, Vice President, University Advancement, St. Cloud State University (Saint Cloud, MN)
- Chris Yates, Associate Senior Vice President, University of Southern California (Los Angeles, CA)
- J. William Zook, Vice President & Director, Seattle Office, PG Calc (Seattle, WA)

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