



AN INTRODUCTION  
TO

**MILLER, CALHOUN & COMPANY**

CONSULTANTS IN

FUND DEVELOPMENT  
MANAGEMENT  
MARKETING  
DONOR & BOARD RELATIONS

Principals: Peggy Calhoun, ACFRE  
Richard G. Miller, CFRE  
**[www.millercalhoun.com](http://www.millercalhoun.com)**

## ***Mission***

Miller, Calhoun & Company's mission is to serve our clients in the most efficient and effective manner possible to strengthen their resources, inspire their commitment and advance donor and community relations. Advocating a team effort, philanthropic fund development practices improve and increase client services potential so that each agency's mission can be fulfilled. This guiding principle is the basis of this firm.

## ***Background***

Peggy Calhoun and Richard Miller joined partnership in 1997, merging two successful consulting firms into Miller, Calhoun & Company.

The firm and its principals, credited with having been involved with raising more than \$1 billion, serves diverse not-for-profits by consulting in the areas of fund development, public relations, board development and management upholding the Donor Bill of Rights and the Association of Fundraising Professional's Code of Ethical Principles and Standards.

Peggy Calhoun began her career over 30 years ago and has spent most of that time working with United Ways, Salvation Army, the Diabetes Research Institute Foundation and other important institutions, museums and centers. She earned the coveted Advanced Certified Fund Raising Executive (ACFRE) designation in 1998 and was President of the local chapters of both the National Society of Fund Raising Executives and the Public Relations Society of America. Ms. Calhoun lectures nationally and teaches various fundraising techniques. She holds an MA in Philanthropy and Development from St. Mary's College.

Richard Miller has 42 years experience in fund development and related fields. He spent many of those years working in education and the arts at institutions such as University of Miami, Case Western Reserve University, Nova Southeastern University and Philadelphia College of Art. He was Vice President of C. W. Shaver & Company during the 1980's. Mr. Miller, a Certified Fund Raising Executive (CFRE), was president of the local fundraising professional chapter and holds an MBA from the Kellogg School at Northwestern University.

## *The Pre-Campaign Preparation Process*

Prospective donors often make their decision to proposed fundraising campaigns long before the actual solicitation takes place. Understanding donor dynamics is the cornerstone of our success. This knowledge is transferred to each client through the Pre-Campaign Preparation Process. Using this important strategy with a team approach, we acquaint the prospective donor with the institution's expectation of gift levels early in the planning process.

The planning process, therefore, should involved key donor prospects with the institution's sense of mission, definition of needs, financial plan and fundraising goals and strategies.

In the *Pre-Campaign Preparation Process*, during which the feasibility of a campaign is determined, this involvement is realized in part through the formation of an *Oversight Committee* (or similar committee structure), which brings key leadership and prospects into the early stages of institutional analysis and planning activity. These steps instill ownership, increase dedication and assure other constituents of the campaign's purpose and the institution's practices. The institution thus is able to establish its levels of expectation promptly and can begin the task of positioning prospects at gift levels substantial enough to meet the goals of the projected campaign.

These steps are generally taken in this order:

- Miller, Calhoun & Company confers with the CEO, appropriate members of the staff and selected members of the Board to review the plans and goals and to identify prospective members of the *Oversight Committee*.
- The *Oversight Committee* is enlisted.
- A *Financial Analysis and Forecast* is developed.
- A concise summary of the *Case for Support* is prepared for use in testing attitudes in confidential interviews.
- A thorough analysis of potential gift resources is made.
- Confidential interviews are conducted.

A *Fundraising Strategy and Action Plan* is drafted, discussed with the *Oversight Committee*, and then presented to the Board of Directors for implementation.

## *Services*

Campaign Strategies and Direction

Capital and Endowment Campaign Implementation

Fund Development Audits and Plans

Fundraising Feasibility Studies

Board Assessment & Recruitment

Program Development for:

Annual Giving

Major Gifts

Planned Giving

Proposal Writing and Grantsmanship Services

Prospect Research

Gift Negotiation Strategies

Prospect Evaluation and Cultivation

Case Statements

Management and Campaign Counsel

Donor Development

Retreats, Workshops, Seminars

## *About The Principals...*

### **RICHARD G. MILLER, CFRE** **Principal**

Miller, Calhoun and Company offers not-for-profits professional counsel tailored to fit the needs and demands of the competitive market with services for fund development, public relations and marketing. Mr. Miller's expertise provides clients with an unusual understanding of the unique demands and opportunities of this sector. He has repeatedly demonstrated his ability to help institutions discover their potential through sound planning, increased financial development, and visibility. He has been credited with generating over \$600 million for a variety of nonprofit agencies.

Richard Miller, a Certified Fund Raising Executive (CFRE) since 1982, is a graduate of Eckerd College and Northwestern University where he earned his bachelors and masters degrees respectively. He served as a member of Eckerd's Alumni Board of Directors; received its Distinguished Alumni Award in 1985 and was elected to its Athletics Hall of Fame in 1982. Mr. Miller has also served on the Board of Directors of the Art and Cultural Center of Hollywood, Lutheran Housing Corporation in Cleveland, Dade Heritage Trust, three local Association of Fundraising Professionals (AFP) chapters, and the Enterprise Ambassadors Program. He was President of the Davie/Cooper City Chamber of Commerce as well as the Ft. Lauderdale/Broward Chapter of AFP.

He has forty-two years experience in fund raising and public relations administration in education, the arts, human services, cultural affairs and health affairs. Prior to forming Miller-Calhoun he led the institutional advancement programs at Nova Southeastern University for seven years. Mr. Miller has served the University of Miami, Adrienne Arsht Performing Arts Center, Dade County Center for Fine Arts (now Miami Art Museum), Case Western Reserve University, and Philadelphia College of Art in a variety of capacities. Mr. Miller was also Vice President of C. W. Shaver & Company where he served a number of distinguished clients, including Wolf Trap, Kravis Center, Davidson College, Avenue of the Arts in Philadelphia, and University of Texas at Dallas.

During his career he has been a lecturer and seminar and workshop presenter for the Council for the Advancement and Support of Education (CASE) and AFP as well as for other national organizations. In addition, Mr. Miller has developed curricula and taught classes for fundraising professionals and volunteers and has conducted workshops for local, regional and national cultural, educational, arts and social service organizations.

In 2005 Richard Miller and Peggy Calhoun co-authored Asking for Major Gifts: Steps to a Successful Solicitation. This popular publication is available through the AFP's Ready Reference Series.

## **PEGGY CALHOUN, ACFRE**

### **Senior Principal**

Peggy Calhoun, an Advanced Certified Fund Raising Executive, has served over 30 years as a full time fundraising professional. She is Senior Principal of Miller, Calhoun and Company.

In 2001 the Association of Women in Communications honored her as the Woman of the Year in Fund Development and Special Events. In 1991 she received the Outstanding Fund Raising award given by the Association of Fundraising Professionals (AFP), former the National Society of Fund Raising Executives, - Fort Lauderdale/Broward Chapter. In 1990 Ms. Calhoun was awarded the Creative Fund Raising Award by the Grantsmanship Center. In 1984, she earned the Professional Staff Certificate from the United Way of America National Academy of Voluntarism. She is included in Who's Who in the South and Southwest; Who's Who of American Women and Who's Who in the World.

Previously Ms. Calhoun taught Grant Writing, Fund Development and Planned Giving for Nova Southeastern University, Barry University, Rollins College and several not-for-profit resource centers. As faculty for AFP, she conducts workshops and sessions throughout the U.S. and online for the national office, two universities and four not-for-profit resource centers. Previously, Ms. Calhoun was a Leave A Legacy speaker for the National Planned Giving Council.

She began her career in 1978 as Executive Director of a crisis intervention agency serving three states. Her extensive staff experience includes raising \$3.7 million in nine months for the Boca Raton Museum of Art, overseeing a \$60 million national campaign for the Diabetes Research Institute Foundation at the University of Miami School of Medicine, and successfully concluding a capital campaign while increasing the endowment from \$2.6 million to \$10 million – for The Salvation Army in Fort Lauderdale. Ms. Calhoun has also raised annual, capital and endowment funds for the Boy Scouts of America, YMCA and United Way. While with United Way, she is credited with tripling the amount of money raised in four years.

Ms. Calhoun is founding member and the past President of the Broward Chapter of the Association of Fundraising Professionals and past President of the Gulfstream Chapter of the Public Relations Society of America. Ms. Calhoun is a former member of the Advisory Board of Florida International University School of Journalism and Mass Communications. She graduated from Southern Illinois University as an Illinois State Scholar and Presidential Scholar at the age of 19. In 1994 she was awarded a Master of Arts in Philanthropy and Development from St. Mary's College in Minnesota and graduated with a straight "A" or 4.0 grade point average. Upon graduation, Ms. Calhoun created Florida Association of Nonprofit Organization's Certificate Program at Barry University where she served as adjunct professor.

In 1998 Ms. Calhoun became the 33<sup>rd</sup> professional to receive the lifetime accreditation of the Advanced Certified Fund Raising Executive; a distinction earned by a select few of the 30,000 members of the Association of Fundraising Professionals.

## ***Additional Strategic Partners***

### **KIM ALONSO**

As Director of Philanthropic IT Initiatives, Ms. Alonso enjoys over 25 years of diverse experience in finance, information technology, strategic planning, project management and communications. Her expertise in business planning, management, online business strategy, communications, and financial management provides clients with comprehensive solutions that improve performance and efficiency. Specializing in integrated systems and communications initiatives, she has provided organizations with improved messaging and branding that attracts and interests donors.

Ms. Alonso has senior level management experience with startup, regional and national companies and a track record of developing teams and inspiring people. The national companies include United Healthcare, AutoNation, Blockbuster, Centex Construction, Sprint, and Turnberry LTD. Also, Ms. Alonso worked with many organizations in the not-for-profit arena, including Pace Center for Girls, Take Stock in Children, Habitat for Humanity, and Girl Scouts of America. She served as an executive board member of Bayview Elementary PTA for four years; two years as President and two as Treasurer.

Previously, Ms. Alonso implemented 65 network infrastructures, developed and integrated suites of applications, provided 5,500 hours of industry training, and assisted in the layout and functionality of ten websites. She has managed job cost and financial controls for over 50 construction offices in the U. S. and the Caribbean.

### **SIDNEY J. BRIEN**

Mr. Brien spent 20 years in Boston as a cultural executive and leader in both visual and performing arts. In 1987 he established Organization Advancement Associates, a Miami-based consulting firm specializing in strategic growth, board development and campaign readiness. His client base of nearly 80 organizations includes Robert & Mary Montgomery Armory Arts Center, MOCA/North Miami, City Theatre, Florida Philharmonic Orchestra, Palm Beach/Institute of Contemporary Art (PB/ICA), Klein Dance, Teatro Avante, Boston Globe Foundation, the National Academy Foundation (New York) and the Performing Arts Division of the Arizona Commission on the Arts.

Mr. Brien is Founding Board President of two of the nation's regional leaders in performing arts innovation: the Boston Dance Umbrella (then the second largest producer of new dance in America) and the Miami Light Project.

Mr. Brien's work with the strategic growth of the Dade Heritage Trust-post Hurricane Andrew was featured in the fall 1994 Historic Preservation Forum, the Journal of the National Trust for Historic Preservation, where his defining strategy strengthened the infrastructure to lead the reconstruction of South Miami-Dade and help to establish a culture of prevention regarding threatened historic properties. The curatorial importance of PB/ICA, a new museum that he created in 2000, was recognized in a ¾ page feature in the New York Times

on September 16, 2001. Other attention came from the Wall Street Journal, Chicago and L.A. Times as well as the international periodical, Interior Design magazine.

Mr. Brien's direction in strategic long range planning includes the Jewish Museum of South Florida, the Historic Museum of South Florida, and the Gold Coast Railroad Museum. Previously, he served as Director of the Arts Partnerships in the State of Massachusetts providing planning and funding assistance for diverse historic institutions like Hammond Castle Museum in Gloucester and the Lowell National Historic Park.

### **MARTHA BRYANT, Ph.D.**

After beginning her career as a field biologist, Dr. Bryant moved to writing and editorial positions at the Chicago Zoological Society and the University of Kansas. Grant writing has been a unifying thread through a diverse career in academia and cultural not-for-profits. Dr. Bryant wrote successful grants to governmental, corporate and private funders for such diverse projects as a National Science Foundation grant that brought the Internet to higher education in the State of Kansas to a private foundation grant for the South Florida Science Museum that purchased a 7-foot plush doll to teach K-3 students about human anatomy, nutrition and health. As a member of the staff, she managed an \$18 million capital campaign at the Knoxville Zoo. As a consultant, she has written successful grants for capital and programmatic projects in the sciences, the arts, education and social services.

Dr. Bryant has a Bachelor's degree in Biology from New Mexico State University, a Master's in Historic Administration and Museum Studies from the University of Kansas and a Ph.D. in Educational Leadership focusing on informal education or free-choice learning.

### **MARLYNN DUVALL**

For over 20 years, Ms. Duvall has been in the fundraising arena specializing in prospect research. Her extensive knowledge in the area of higher education and biomedical research has earned her accolades from the Association of Professional Researchers for Advancement (APRA). In addition to research, Ms. Duvall has knowledge in data mining, prospect identification, data base management and other aspects of the industry that is required in the management of large campaigns and ongoing stewardship programs.

A sampling of Ms. Duvall's work includes the identification of qualified donors contributing a \$2.5 million gift to the Florida Atlantic University (FAU), College of Business; a \$2.6 million grant to the Wilkens Honors College at FAU and several \$50,000 donors to the FAU football founders program. In addition, Ms. Duvall assisted the University of Florida in the "Performance That Counts" capital campaign with a \$500 million endowment.

Her biomedical research assisted with the creation and expansion of Scripps Florida. Her research at Scripps Florida resulted in several major donors to the Scripps Florida Corporate Club program as well as the identification of national, regional and local foundation prospects.

Ms. Duvall founded the Association of Professional Researchers for Advancement-Florida Chapter in 1998 and served as the president from 1998-2000. She established the APRA-FL Mentor Program in 1998. In addition to APRA, Ms. Duvall has been associated with AFP (formerly NSFRE) and the Council of the Advancement Support of Education (CASE).

She continues to contribute to the profession of professional prospect researchers through her continued work, webinars and lectures for APRA and AFP conferences.

## **E. THOMAS EZELL, Ph.D.**

Since 1979, Dr. Ezell has served over 35 private schools in capital campaign planning and management primarily in Florida.

A graduate of Lafayette College where he was a Dean's List student, Dr. Ezell earned the *Diplôme d'Etudes* (with honors) from the *Université d'Aix-Marseille* (France) and his Ph.D. (French Renaissance Literature) at the University of Michigan. While there, he taught French, coordinated the French for Doctoral Students' Program, and worked as a translator for the University of Michigan's Medical School.

In addition to holding a number of teaching and senior level administrative posts at the University of Michigan, the State University of New York, Rensselaer Polytechnic Institute, and Skidmore College, Dr. Ezell is active in the Council for the Advancement and Support of Education (CASE). He is an original member of CASE-on-your-Campus consulting services and has conducted numerous CASE seminars and workshops across the country and in Canada. In addition, he authored a chapter in CASE's book: An Introduction to Fundraising, 1983. He has also published articles on health care reform and economics, strategic marketing, future trends, demographics, and management. Dr. Ezell has served two terms as a review panelist for the National Endowment for the Humanities (NEH) in Washington, on the Gannett Foundation's Community Priorities Committee (CPC), as Senior Consultant to the Florida Association of Nonprofit Organizations (FANO) and as consultant for the Florida Council of Independent Schools (FCIS). He has also served on a number of accreditation teams for the New England Association of Schools and Colleges (NEASC).

His work has been recognized by the Association of Private Enterprise Education; the Council for the Advancement and Support of Education; the Association of Fundraising Professionals; the Chambers of Commerce of Paris, France and Saratoga Springs, New York; the Dr. Scholl Foundation; Lafayette College; and the Delphi Education Foundation.

## **LAURIE HARTSFIELD**

Ms. Hartsfield has served the development profession over 10 years. Her experience includes directing healthcare not-for-profits and a trade association in all programmatic, cause-related marketing and development activities. After moving to Florida, she served as Florida Development Officer for the Trust for Public Land until 2003.

Since 1999 Ms. Hartsfield has served as a consultant for specializing in development audits; feasibility studies; capital campaign direction; campaign follow-up services; case development; marketing strategies; and public relations programs. Since that time, Ms. Hartsfield helped to raise more than \$20 million to further organizational goals for the clients she served.

Ms. Hartsfield is a member of Association of Fundraising Professionals, serves as a board member for Junior League, and is actively involved in her community. Ms. Hartsfield has a degree in Mass Communications with an emphasis in public relations.

## **STEVEN S. KLOTZ, CFRE**

Seasoned by over 30 years in the not-for-profit sector, Mr. Klotz, a Certified Fund Raising Executive, has served organizations as Executive Director, Development Director, grants specialist and board member. In his capacity as fund counsel he has served numerous agencies and institutions throughout the nation, large and small, religious and secular, with diverse missions, approaches and constituencies.

Mr. Klotz' strengths include his capacity to meld an organization's vital components into a compelling plan of action, working with principals, volunteers and prospective donors to achieve mutual objectives. His accomplishments include creation of a public-interest law firm providing services for mentally and physically disabled persons, speechwriting and public relations activities for political and community activists, and management of numerous capital campaigns, including a \$25 million effort for the International Game Fish Association's Fishing Hall of Fame and Museum.

Earning a BA with honors from Temple University, Mr. Klotz enjoys a thorough background in literature, public relations, philosophy, and journalism. His expertise coupled with his professional experience provides a valuable dimension to professional development teams and not-for-profit entities as they implement their missions in the communities they serve.

## **CYNTHIA B. MILLER**

Ms. Miller has been active in Florida arts and cultural affairs as a professional and volunteer for over a decade, most of which has been spent in South Florida.

In 1997 Ms. Miller became Executive Director of the Art and Culture Center of Hollywood after serving as its Curator of Education. Through her leadership she expanded the Center's mission to include the performing arts as well as the visual arts; quadrupled tourism related project dollars from Broward County, local hotel, and tourist destinations; engineered several public/private partnerships for operating support; and founded and secured funding for the very successful Ocean Dance event.

In 2003 she joined the City of Hollywood as Director of Arts and Cultural Affairs while keeping her position with the Center. In this dual role, Ms. Miller assisted the City Manager of Hollywood in evaluating, researching, and developing new and ongoing cultural projects in the city. Additionally, she oversaw the management and coordination of Young Circle

ArtsPark and the Hollywood Central Performing Arts Center. She spearheaded the effort to secure the initial \$5 million in capital funds for construction of the region's first ArtsPark in Hollywood, and worked with community leaders to secure an additional \$11 million in public in public funding.

A *magna cum laude* graduate of Florida International University, Ms. Miller received a master's degree in art history from the University of Florida. She is a member of the College Art Association, American Association of Museums, Florida Dance Association, Theater League of South Florida, the Association of Performing Arts Presenters, the Coalition of Affordable Housing Providers, and the Housing Finance Authority's Advisory Board. She is a founding member of Funding Arts Broward - a women's philanthropy group which raises funds for the arts. Ms. Miller has written and presented several papers on the arts and has been involved in numerous community activities in South Florida. She has been recognized with various appointments and commendations, including being a cultural delegate for the Governor's Trade Mission to Brazil in 2000 and, more recently, the ArtServe/Broward Cultural Foundation Encore Award for Individual Leadership in the Arts.

Currently, Ms. Miller is President of Creative Community Development, Inc. a community re-development company with interests in affordable housing and other market-related development related to the arts, such as incorporating a community-based public art element into residential development projects. She has developed Affordable Housing education programs for the School Board of Broward County and is currently developing several new grants based initiatives for Florida International University in Miami.

## **LISA H. PETERFREUND**

As a graduate of the Yale School of Forestry and Environmental Studies, Ms. Peterfreund enjoys several organizational achievements. As trustee of her family foundation, she evaluates grant proposals from and provides financial assistance to approximately 30 educational, cultural and environmental not-for-profits annually. Over the past two years she has applied her skills as trustee to advise not-for-profits in donor relations conduct background research on funding sources for capital campaigns and currently is assisting in the development of two new Florida foundations. Upon moving to Florida in 1999, she served as the first Development Director for Florida Atlantic University's Pine Jog Environmental Education Center.

Previously, she served as the first Director of Development for the Center of International Environmental Law in Washington, D.C. where she raised \$1 million dollars in new foundation support. Prior to this position, Ms. Peterfreund negotiated 27 national cooperative agreements at 30 EPA facilities totaling approximately \$52 million for the American Association of Retired Persons (AARP). In 1982 she founded The Wildlife and Forestry Professional Information Exchange, a volunteer organization for natural resource professionals.

Ms. Peterfreund is a past board member of Defenders of Wildlife and a founding member of the Environmental Alliance for Senior Involvement. She served on the Board of America the Beautiful Fund for over ten years supporting community projects nationwide in cultural,

historical and beautification projects. Currently she serves as a Board member to Resource Depot in Riviera Beach, Florida and enjoys membership in the Environmental Grantmakers Association, the Donors Forum of South Florida, and the Business Advisory Council of the Palm Beach County Cultural Council.

## **PAUL E. THOMPSON**

Mr. Thompson has served as a not-for-profit executive and fundraiser for several cultural organizations in South Florida over 40 years, primarily in Miami-Dade County. He has served in top management positions in several important cultural institutions, and has also performed in the private sector as a gallery manager and an art and antiques consultant. His experience in the visual and performing arts and historical institutions includes Managing Director of the Gusman Center for the Performing Arts; Assistant Director of the Lowe Art Museum at the University of Miami; Executive Director of Dade Heritage Trust; and Executive Director of the Key West Art and Historical Society.

Joining the University of Miami's Development Department in 1967, Mr. Thompson subsequently served for over seven years as Assistant Director of the UM's Lowe Art Museum. A term as Managing Director of the Key West Art and Historical Society was followed by four years managing Dade Heritage Trust, Miami-Dade County's prestigious historic preservation organization. Following a similar term as manager of a local art and antiques gallery, Mr. Thompson joined the Gusman Center for the Performing Arts as Development Director, rising to become Managing Director of that historic institution.

In his positions, Mr. Thompson has held responsibility for every area of institutional concern, including planning and budgeting, fundraising, marketing, media/public relations and private and government interaction; personnel management; programming; citizens' support organization, including membership and special events; and much more. He has written and produced printed materials of all types, curated over 50 museum exhibitions and helped produce some 300 stage performances.

Mr. Thompson has a proven track record in producing support and promotional materials of the highest caliber. His career success of grant applications that are funded exceeds 90%.

Mr. Thompson holds the Bachelor of Fine Arts from Ohio University and an M. A. from Kent State University specializing in studio art and art history. He has served as a Director of the Coconut Grove Arts Festival, as President of the Dade Cultural Executives Council and volunteered for several years as on-air auctioneer for Channel 2 Public Television. He is past secretary of the Friends of Gusman Center and a board member of the Dade Cultural Alliance.