



Philanthropy Partners of the Cape and Islands

A member of the Partnership for Philanthropic Planning

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Philanthropy Partners of the Cape and Islands Organizes Annual Meeting Luncheon with Presentation of Two Case Studies on Nonprofit Rebranding and Mergers January 29th, 2014 at Alberto's Ristorante in Hyannis

Yarmouth Port, MA, November 27th, 2013 - Philanthropy Partners of the Cape and Islands (PPCI) is pleased to announce that Lise Lambert, Chief Growth Officer, HopeHealth and Jerome Karter, Executive Director, Cape Cod Symphony and Conservatory of Music & Arts (CCSCMA), will be the guest speakers at the PPCI Annual Meeting. The lunch meeting will be held on January 29th, 2014 from 11:45 a.m. to 2:00 p.m. at Alberto's Ristorante, Main Street, Hyannis. The luncheon is free to members of the PPCI and non-members pay \$35. To register for the luncheon, please call (508) 280-1822, email mwhiteppci@aol.com or register online at www.capecodgiving.org. Deadline for registration is Friday, January 24th, 2014.

PPCI President Jean McCutcheon will preside over a very short business meeting, followed by the luncheon and guest speakers **Lise Lambert** and **Jerome Karter**. Ms. Lambert will talk about HopeHealth's recent re-branding exercise and Mr. Karter will focus on the merger of the Cape Cod Symphony Orchestra and the Cape Cod Conservatory of Music and Arts. This session will explore how nonprofits can freshen their approach and re-focus and combine efforts to better utilize available resources to deliver their programming.

About the Speakers:

Lise Lambert joined Hope Health (formerly called *Hospice of Cape Cod and the Islands*) in April of 2008 as the Vice President of Business Development and Philanthropy, assuming the Chief Growth Officer title in 2012. In this capacity, she has responsibility for the company's growth and strategic relationships, with oversight of sales and marketing, intake, HouseCalls and philanthropy functions.

Before relocating to Cape Cod, Ms. Lambert worked for a California-based equity firm, Triton Pacific Capital Partners, as a retained healthcare executive. Ms. Lambert's earlier healthcare experience includes several years with VistaCare, a for-profit national provider of hospice services. Earlier, Ms. Lambert was the founder and principal of Relevant, Inc., which provided interim executive management and strategic consulting services companies ranging from software start up to Fortune 500 technology companies. In 1986, Ms. Lambert co-founded Mastersoft, Inc., a software development and marketing firm, which was sold to Adobe Corporation in 1995. Ms. Lambert co-founded three other software organizations, and held senior management positions at several other technology companies. Early in her career, Ms. Lambert taught English and Music, and also taught deaf and hearing-impaired children.

Ms. Lambert received her Bachelor of Education and her Masters Degree in Deaf Education from Smith College. She was the recipient of a fellowship for the MED Program at Smith College in 1979, a Carnegie Mellon Research Grant in 1977-78, and was awarded a Performance Certificate in Music from Rivier College of Music in 1974. She has served on the boards of public and private technology companies including NETTIME Solutions, LLC, Planitax, Involve Technology, The Board Institute, OutBack/GoAmerica, and held a board seat on the National Hospice and Palliative Care Organization's National Advisory Committee.

Jerome Karter, Executive Director, Cape Cod Symphony Orchestra and Conservatory of Music & Arts

After obtaining an Economics degree from Oberlin College, Jerry Karter spent 35 years in the insurance and reinsurance industry, 18 of which were spent in London, Paris and Brussels before retiring to Orleans in 2002 and becoming involved in the orchestra. He retired from SCOR GROUP of Paris, France, one of the world's largest reinsurance firms, where he served as President and CEO of the U.S. subsidiaries from 1989-2002. He simultaneously was a member of the executive committee SCOR GROUP, Paris. In "retirement," Jerry founded Sage Consulting, a reinsurance arbitration and expert witness practice before he turned his attention to the symphony.

Jerry Karter spent two years on the board of trustees for the Cape Cod Symphony Orchestra (CCSO) and served as Vice Chairman just prior to being elected the Executive Director of the organization in 2007. Currently, Jerry Karter oversees all operations as Executive Director of both the CCSO and the Cape Cod Conservatory of Music and Arts, which merged September 1, 2010.

Philanthropy Partners of the Cape and Islands is a local chapter of the Partnership for Philanthropic Planning, a national organization. More information can be found at www.capecodgiving.org or by calling (508) 280-1822 or writing to: Philanthropy Partners of the Cape and Islands, P.O. Box 41, Yarmouth Port, MA 02675. www.capecodphilanthropy.org