

V O I C E

News of the Long Island Chapter of the Association of Fundraising Professionals

The Association of Fundraising Professionals (AFP), which represents more than 30,000 members in 197 chapters throughout the world, advances philanthropy through advocacy, research, education and certification programs. AFP fosters the professional development of fundraising professionals and promotes ethical standards in the fundraising profession.

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Philanthropy Day 2010 & 2011 Good People...Good Causes

by Rob Taylor, *Philanthropy Day 2011 Chair*

Celebrating Philanthropy Day 2010

The work is never done." Surely the fundraising profession can say this more authentically than most—which is why last November Philanthropy Day 2010 set out to offer not only expert advice and substantive networking, but also a close look at the true value of the work we do.

One highlight was keynote speaker Dr. Stephen Post, Director of the Center for Medical Humanities, Compassionate Care and Bioethics at Stony Brook University, who presented recent scientific findings about the benefits of volunteerism and philanthropy. Some were surprising and all were inspiring. His book, *Why Good Things Happen to Good People*, offers a fuller picture of these findings, and defines ten ways of giving, including forgiveness, courage, loyalty, and creativity.

Another highlight was a new venue, the Huntington Hilton, which provided a fresh space for returning attendees and a smoothly run facility that

pleased everyone, including vendors and our all-important behind-the-scenes committee volunteers.

At the heart of both the Day and the hotel space is the awards luncheon. The amazing committee pulled off the luncheon with comfort and style. The award-winners' speeches and stories were another great source of inspiration for attendees.

A special word of thanks to Barbara Rogus, the long stand-

ing presenter for the all day workshop on fundamentals for people new to the fundraising profession. Barbara has taught this course for many years and has shared her ideas and ideals with many developing fundraisers.

With the large number of sponsors and exhibitors, Philanthropy Day 2010 raised the funds needed for AFPLI to do its work throughout the year. Anchored by the ongoing generosity of Bank of America Merrill Lynch

(CONTINUED ON PAGE 7)



2010 Awards Chair and 2011 Chair Rob Taylor, Honorees Ann McDermott-Kave, Frank Pelliccione, Alan Kelly, Kyle Orent, Joe Mancino and MSC Industrial Supply Co.'s Erik Gershwind, and 2010 Chair Pat Chambers Daly

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A Message from the President

by Fran Karliner
Director of Development, Long Island Crisis Center



Dear Friends and Colleagues,

In all circles, there is talk about the effects of the latest economic crisis and the resulting need for everyone to adjust their way of doing business to align with the “new reality.” As fundraisers, we are certainly cognizant of this. Additionally, our way of doing business is changing due to the radical changes in technology that have revolutionized how we communicate with donors and get our organization’s mission and needs out into the marketplace.

While methods may change, the need for a sound and solid foundation in fundraising’s best practices does not. AFPLI is proud of its role in providing opportunities for those “new to the field” and for experienced development practitioners. Annually, Philanthropy Day provides an intense, all-day educational experience; monthly, educational program meetings present experts on specific aspects of fundraising; and the cornerstone of our educational program, the AFPLI/Molloy College Certificate Program in Development and Fundraising Management, provides a college level learning experience on fundraising in general, and specific areas from which you may choose.

I am happy to share this page with our announcement about the AFPLI/Molloy course offerings for Fall 2011 and bring it to your attention.

Sincerely, 



Fall 2011 Course Offerings for AFPLI/Molloy College Certificate Program In Development & Fundraising Management!

Want to go further in your fundraising career? Need to gain additional expertise in a specific area of fundraising? Have a new employee who could use a stronger fundraising foundation? Do you know someone who is looking for a career change?

The AFPLI/Molloy College Certificate Program in Development & Fundraising Management has course offerings that: encompass broad-based fundraising knowledge to establish you in the field; and specific development areas to advance your current set of skills.

Register for the following:

Your Career in Development & Fundraising presented by Randi Shubin Dresser, CFRE, CEO & President of Island Harvest and Robert Mottola, V.P., Development & Community Relations, Huntington Hospital
Wednesday, September 14, 2011, 6:00 – 9:00 p.m.

The Business of Raising Money for the Non-Profit Sector instructed by Marsha Gittleman, Director of Development, UCP of Suffolk County
Thursdays, September 22 – November 3, 2011, 6:30 – 9:30 p.m.

The Art and Science of Acquiring Major Gifts instructed by Patricia H. Clemency, CFRE, President & CEO, Make-A-Wish Foundation of Metro NY
Tuesdays, September 20 – October 18, 2011, 6:30 – 9:30 p.m.

Special Events and Sponsorships instructed by Marsha Gittleman
Tuesdays, November 22 – December 20, 2011, 6:30 – 9:30 p.m.

All courses are held at Molloy College, Suffolk Campus on Route 110. To register, go to: www.molloy.edu/ce/fundraising; for information about tuition reimbursement opportunities for AFPLI members, call 631-249-5008.

“Prognostication is very difficult, especially when predicting the Future.”



As we have found out in observing the changes in the estate tax law, there are no sure bets as to which way the laws will go. Therefore, most good estate attorneys are drafting very flexible plans which will allow more easily for change. And so it is also true in the world of Planned Giving. One sees more and more ideas surfacing which will help the donor problem solve in order to meet their desire to help a 501(c)3 within their means. Many of the gifts being used incorporate a structure which is flexible and will allow for change, as we do not know what future tax law will bring.

One good example of flexibility is the “Charitable IRA Loan Strategy (CILS).” For certain donors the CILS allows great flexibility in helping a donor move funds for the benefit of a 501(c)3. The donor still retains the right to incorporate the IRA in their own estate plan for benefit of their family and/or the 501(c)3 at a later date. Similarly the Flexible Endowment, which has been discussed in previous articles, allows the donor to accomplish recognition during their lifetime and fulfill the pledge/gift on death. If anyone would like more details on either technique, just call or email me.

I have one interesting observation regarding discussing Charitable Gift Annuities (CGAs) with donors. I had written an article about CGAs as a safe harbor investment and clearly nothing has changed. However, as many of you know, CD rates and money market funds for older donors continue to pay incredibly

low rates. Even though returns on CGAs have been lowered a bit over the past few years, they still pay a relatively competitive rate of return. You must factor in the portion of the return which is tax free and you still have a great investment vehicle which helps the 501(c)3, to say nothing about the tax deduction.

I read an interesting article on changing “No” to “Yes.” Laura Dean and Pamela Davidson discussed the typical answers that donors may give when asked for a gift:

- All my assets are tied up or illiquid
- All my planning is done
- I’m retired or living on a fixed income
- I’m saving for retirement
- I’m helping my parents, siblings, spouse/partner or adult children
- I want to leave as much as possible for my heirs
- I will be able to make a nice gift after I sell my business or land
- I plan to leave my home or farm to charity in my will or trust
- I want to handle the investments. I’m better at it than a charity

They offered interesting insight in how to handle these common answers from donors and responded with – “Would you consider making a gift if we could show you how.....”. Again, if anyone wants a copy of the article please let me know.



James E. Meyer is Partner,
Greco Planning Group, Inc.

New Members

Jessica Anderson-Ruiz

NY State Parks - Recreation
& Historic Preservation
P O Box 247
Babylon, NY 11701

Bob Block

Five Towns Community Chest
1004 Central Avenue
Woodmere, NY 11598

Karen Boorshtein

Family Service League, Inc.
790 Park Avenue
Huntington, NY 11743

Dr. Mary Carlson

Shoes For All, Inc.
637 Willis Ave., Suite E
Williston Park, NY 11596

Robert Castano

North Shore - LIJ Health System
Foundation
125 Community Drive
Great Neck, NY 11021

Dan Cohen

Music of Memory
142 Emory Road
Mineola, NY 11501

John J. Colleary, Jr.

407 Ellison Ave.
Westbury, NY 11590

David A. DeCicco

Hofstra Law School
549 Borden Avenue, Apt. 7G
Long Island City, NY 11101

Alex Edwards-Bourdez

The Stony Brook School
1 Chapman Parkway
Stony Brook, NY 11790-1799

Kim Fernandez

Third Eye Insight -
Fitness for the Blind
9 Jean Road
West Islip, NY 11795

Carol Ghiorso G. Hart

Vanderbilt Museum & Planetarium
180 Little Neck Road
Centerport, NY 11721

Leigh Hubbard

Peconic Land Trust
296 Hampton Road
Southampton, NY 11969

Joyce Johnston

62 Windmill Drive
Huntington, NY 11743

Tiffany Jordan

Hofstra University Museum
112 Hofstra University
Hempstead, NY 11549

Laura Juliano

John T. Mather Memorial Hospital
75 North Country Road
Port Jefferson, NY 11777

Alison Karmel

Nassau Land Trust
2417 Jericho Turnpike
Box 280
Garden City Park, NY 11040

Jennifer Lavella

Planting Fields Foundation
PO Box 660
Oyster Bay, NY 11771

Christine Lunsford

Hofstra Law School
671 Adele Place
Baldwin, NY 11510

Nina Madison

The Parrish Art Museum
25 Job's Lane
Southampton, NY 11968

Marcos Maldonado

Youth Enrichment Services
P. O. Box 105
West Islip, NY 11795

Jessica McAvoy

Ma'am-Arts, Admin. & Mgmt
59 Mulford Street
Patchogue, NY 11772

Karen R. Means

Goodwill Industries of
Greater NY/Northern NJ
4-21 27th Avenue
Astoria, NY 11102

Sheila O'Brien

Guide Dog Foundation
371 East Jericho Tpke
Smithtown, NY 11787

Michael Pfeiffer

Ronald McDonald House of LI
267-07 76 Avenue
New Hyde Park, NY 11040

Charlie Prizzi

Cold Spring Harbor Laboratory
1 Bungtown Road
Cold Spring Harbor, NY 11724

Berenice Russell

The Stony Brook School
1 Chapman Parkway
Stony Brook, NY 11790-1799

Melissa Scarlata

Society of St. Vincent de Paul
249 Broadway
Bethpage, NY 11714

Marc Silverstein

Tender Touch for All
43 Marlin Lane
Port Washington, NY 11050

Cheryl Ann Steinhauer

12 Trout Ponds Court
Brookhaven, NY 11719

Steven G. Taibbi

Transplant Speakers International
5 Mulberry Drive
Huntington, NY 11743

James Verdi, CFP

Synergy Wealth Strategies
52 North Country Road
Smithtown, NY 11787

Dionne Walker-Belgrave

DWB Associates
34 Van Buren Street
Farmingdale, NY 11735

Allison Briedbart White

16 South Court
Port Washington, NY 11050



facebook.com/afpli

Please register in advance for monthly meetings!

Meet the Administrator

Joan Connor



“Listen and learn!”

1. How long have you served as the Administrator of AFPLI?

I've been the administrator for about 16 years now; when I first became involved the organization was officially named National Society of Fundraising Professionals (NSFRE). In 2000, we became the Association of Fundraising Professionals – and we are the Long Island Chapter.

2. What keeps you motivated in your role as Administrator?

It has been a privilege to meet some wonderful people who truly espouse their causes and that continues to this day. New effervescent people come into this profession with wonderful ideas and strategies. It is gratifying to know that, in some small way, I may have facilitated their entry into the field.

3. What is the greatest advance you have seen [during your tenure] in AFP as a whole? Within the Chapter?

It's obvious that the advancement made in all communication areas has been the single greatest advance. The Internet, emails, social networking, etc. has opened fundraising to, literally, the world. Just think, right after the tragedy of 9/11, we were searching for where and how to donate. Less than 10 years later, we all had the ability to donate – via SmartPhone – to help with the Japanese crisis within 24 hours. Here at AFPLI we try to keep our members and colleagues aware of what's going on regarding the development world in the new and ever changing electronic media.

4. Where do you see the greatest opportunity for the Chapter as it moves ahead into the future?

Any organization is only as strong and vibrant as its members; we are quite fortunate here on Long Island to have a steady stream of neophytes that mix quite well with our “seasoned professionals.” Not only do newcomers arrive with excitement, exuberance and an eagerness to learn, but more established professionals are equally impassioned to hear fresh ideas.

5. What is the benefit of membership that you would like to see the LI Chapter members better utilize? In other words, in your opinion, what is AFPLI's best kept secret?

There are actually 2 wonderful benefits that, in my opinion, are underutilized: The first is the AFPLI mentoring program. As a member you can be paired up with another member who has expertise in an area that you seek advice: capital campaign, annual/planned giving, direct mail, etc. Whether you meet in person or talk on the phone – if a member needs help in a certain area – we have members with the expertise.

The other benefit that most AFP members rarely use is the research that can be done for you at AFP International. Besides having thousands of articles readily available online, the staff can and will do the research and either email or send you all the documentation.

6. You spend a great deal of time coordinating Philanthropy Day. What is the most important detail about Philanthropy Day that you would like to impart to our readership?

Year after year, AFPLI presents a wonderful slate of honorees to be recognized as true philanthropic heroes here on Long Island; volunteers, professionals, corporations, youngsters and some very special people are honored at the Awards Luncheon at Philanthropy Day. But the most important part of the day is knowledge and networking. The committee strives to present an educational program that will have “something for everyone” from the entry level to the senior professional – and that is truly the heart and soul of Philanthropy Day.

7. If you could offer one piece of advice to those involved with not-for-profit organizations on Long Island, what would it be?

Very simply – “listen and learn”!

(CONTINUED ON NEXT PAGE)

Ethical Issues in Fundraising

By Marsha Gittleman and Marc Suntup

By virtue of our membership in AFP we each make a commitment to subscribe to an ethical code of conduct and fundraising practices.

In most cases, this is easy to accomplish by simply “doing the right thing” and adhering to the AFP Donor Bill of Rights.

Occasionally, however, we all face challenges, or “gray areas,” beyond honoring our donors’ wishes, informing and acknowledging them as appropriate and staying true to our organization’s mission.

This recurring column will address some of these situations, and welcomes questions posed by our readers.

Looking a Gift Horse in the Mouth

The Scenario: A long time donor wishes to fulfill his/her pledge to your golf event through payment from their family foundation. The foundation does not allow funds to be used for participation in events or for attending dinners. The donor wants a receipt showing the gift is fully tax-deductible, although he/she will be playing golf and enjoying all the other amenities at the event. What would you do?

Our Answer: It is the responsibility of every development professional to adhere to principles and practices which are honest at all times. In addition, we are responsible to effectively steward the relationship with our donors. Sometimes there is a conflict in these dual obligations.

In this case, it is important to educate the donor that the tax receipt *must* accurately reflect the true value of the contribution and include the non tax-deductible portion of the received benefit. To do otherwise, would jeopardize both your organization and the donor’s foundation tax status. However, suggesting to the donor that their foundation check cover the tax-deductible portion of the gift, and they write a separate check (NOT from the foundation) to cover the non tax-deductible portion of their gift, can create a win/win situation for all.

We encourage you to review all legal and tax matters with your organization’s counsel.

Email your questions/scenarios or feedback for “Do the Right Thing” to mgittleman@ucp-suffolk.org or msuntup@gurwin.org.



Marsha Gittleman is Director of Development at UCP of Greater Suffolk.



Marc Suntup is Chief Development Officer at Gurwin Jewish Healthcare Foundation.

News & Notes

Lynn Drucker is now the Director of Development at Winthrop University Hospital in Mineola.

James Sheridan is Director of Development at John Jay College.

Christine Cusack is the Director of Development at Mercy Haven, Inc.

Steven Humphrey, CFRE is Director of Development at Suffolk Community College Foundation, Inc.

Tammy Severino is President of RPC Development.

Meet the Administrator

(CONTINUED FROM PREVIOUS PAGE)

8. When should the members of the Chapter reach out to you? What assistance can you provide LI fundraisers that many may be unaware of?

Chapter members should feel free to call on any pertinent issue – while we may not be able to answer them directly, there is a 26 member Board of Directors and other committee members to whom they will be referred. If they are changing positions, looking for a new position, etc. the office will guide them along.

9. How can the Chapter’s membership reach you?

Chapter office – 631-249-5008, Fax – 631-249-5010, email – info@afpli.org

10. What is the best part about working with AFPLI?

Simply put – the people!

A Whip and a Chair: Working with Your Board of Directors

By Charles D. Kimpel, CFRE

As a development professional you will be called upon to work with members of your organization's Board. It's an important part of your job.

What do you do now? The answer depends on many factors. Before we try to answer it, let's start from the beginning, with an understanding of the Board. This time we'll start with the composition of the Board. In subsequent issues we'll deal with Board functions, responsibilities, training and other matters. Once you understand how the Board is intended to function, you'll know how to tame it.

Our first topic will be the composition of the Board. We may not always believe this, but Board members *are* human beings. It is important to get that out of the way because you will feel more confident in dealing with them.

Another important thing to know about Board members is that they are individuals. They have hopes, fears, desires and dreams. Sometimes the more positive of these characteristics are in line with the mission of the organizations on whose board(s) they serve. Fortunate are those organizations.

Be aware, however, that not all directors serve because they truly believe in the mission. In some cases individuals are asked to serve on a Board because someone already on the Board thought they would "make a good Board member."

Sometimes directors serve because they were asked by someone to whom they could not say no. Sometimes people join a Board because they believe it will be good for their business, their reputation or their social standing. It helps if you can discern their real motivation for being on the Board.

Oftentimes Board members have been involved with an organization in some capacity which has brought them to the attention of the nominating committee. This is a good way for both parties to get to know each other, and is often the beginning of a good relationship.

In the cases where a person has little or no familiarity with the organization, a considerable period of "getting to know you" will be required before the member can be expected to understand the culture, mission and structure of the organization.



Charles Kimpel is Senior Partner at Philanthropic Consulting Service, the firm he founded in 1995. Previous positions include Chief Development Officer for a Manhattan hospital and President and CEO of a national health agency.

Philanthropy Day

(CONTINUED FROM PAGE 1)

and the organizing genius of committee chair Pat Chambers Daly, Philanthropy Day 2010 raised the bar for AFPLI in spite of the turbulent economy.

Planning P-Day 2011

Philanthropy Day is now in its 24th year. At this point in its "life story," there's a need for balance between maintaining what's become a valued tradition and keeping a spark of inspired freshness. It's the goal of the 2011 committee to achieve that balance.

Our focus for the next 90 days:

Education – With over 600 attendees, Philanthropy Day can offer an increasing number of relevant and accessible workshop experiences. We are excited about this year's lineup of presenters, but we are still open to adding more. Is there a colleague you can recommend as a strong speaker or teacher? Is there a topic/skill you yourself feel qualified to design and propose as a workshop? Send an email to Alan Kelly at alan.j.kelly@hofstra.edu with your ideas and suggestions.

Celebration – It's the Award Committee's privilege to review the nominations received for AFPLI's six annual awards honoring men, women, youth, and corporations who philanthropize locally to make Long Island a better place. Thanks for your help in identifying this pool of worthy nominees!

Information – We're working to offer sponsors and exhibiting vendors substantive value for their investment that goes beyond the physical space to set up a table. Increasing visibility through digital technology and social media is a priority and a creative challenge for this year's committee.

We're also working to increase the number of vendors. Philanthropy Day represents AFPLI's single greatest fundraising opportunity of the year. We greatly value your help in identifying potential sponsors or exhibitors. Please contact John Decristoforo at john.decristoforo@gbbgc.org or Lois Gold at lgold@syjcc.org with a contact name or to obtain more information.

Though we're keenly aware that the work is never done, we've committed ourselves to the good causes and good people that Philanthropy Day so faithfully supports. Join us! We look forward to your participation at Philanthropy Day on Friday November 18, 2011.

Calendar

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AUGUST						
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- May**
- 3** 6:30 PM "Prospect Research & Information Management" Course begins
- 6** 8:00 AM AFPLI Board Meeting Philanthropy Day Meeting
- 17** 8:00 AM Professional Education Meeting
Major Gifts: Part II – The Art of Major Gifts
(focus on prospects and moving them up the ladder)
- 20** 8:00 AM Philanthropy Day Meeting
- June**
- 3** 8:00 AM AFPLI Board Meeting
- 21** 8:00 AM Professional Education Meeting
Major Gifts: part III – The Art and Science of Major Gifts – Creating and
Enhancing Your Program (putting it all together)
- 24** 8:00 AM Philanthropy Day Meeting
- July**
- 29** 8:00 AM Philanthropy Day Meeting
- August**
- 26** 8:00 AM Philanthropy Day Meeting
- September**
- 9** 8:00 AM AFPLI Board Meeting
- 14** 6:30 PM "Your Career in Development & Fundraising" Course begins
- 16** 8:00 AM Philanthropy Day Meeting
- 20** 6:30 PM "The Art & Science of Acquiring Major Gifts" Course begins
- 20** 8:00 AM Legislative Meeting
- 22** 6:30 PM "The Business of Raising Money for the Non-Profit Sector" Course begins
- October**
- 7** 8:00 AM AFPLI Board Meeting
- 18** 8:00 AM Monthly Educational Meeting
- 21** 8:00 AM Philanthropy Day Meeting

For further information and reservations please call the AFPLI office 631/249-5008.

Due to rising costs, the reservation and cancellation policies for monthly educational meetings will be strictly enforced. Cancellations received after the cut-off date cannot be credited or carried over. If you make a reservation and don't show, you will be billed, since guarantees to the hotel must be met. Please help us maintain monthly meeting costs.

AFPLI

V O I C E

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