

## AFP ICON 2025

### Breakout Education Sessions

Sun, Apr 27, 2025

9:00am - 10:15am

Room 323-325

#### **From Inspiration to Implementation: Turning Conference Insights into Action**

Transform your conference inspiration into tangible action and lasting impact. In this session, you'll gain a practical, step-by-step framework to implement fresh ideas within your fundraising team or department. From securing leadership buy-in and establishing accountability partnerships to measuring progress and celebrating quick wins, you'll learn how to break free from old patterns. Join us to ensure that the insights you take home don't fade away—but instead spark meaningful, measurable change.

Education Track(s): Ethics, Accountability and Professionalism

Audience: Introductory/Foundational

Keith Greer, CFRE

University of New Mexico Foundation - Director of Development

Carissa Konesky, CFRE

Simon Fraser University - Advancement Officer, Leadership Giving

Sun, Apr 27, 2025

9:00am - 10:15am

Room 333-334

#### **How Good Governance Can Improve Business and Strengthen Volunteer Engagement**

Attendees will immerse themselves in two vital facets: cultivating robust governance frameworks and fortifying volunteer engagement strategies. By harnessing the power of volunteerism, organizations can catalyze an influx of donors, cultivate future leaders, and foster stronger community connections, propelling their mission forward with amplified support and engagement.

Education Track(s): Volunteer Involvement

Audience: Applied

Rochelle Jerry

Jerry Consulting Group - CEO + Co-Founder

Sun, Apr 27, 2025

9:00am - 10:15am

Room 335 - 336

#### **Exploring Real World Ethical Scenarios and Doing What is Right**

How do you figure out what is the correct thing to do when confronted by a challenging situation involving a donor or your organization? In this session, participants will review and evaluate 5-8 real world ethical scenarios through small group facilitated discussions.

Education Track(s): Ethics, Accountability and Professionalism

Audience: Introductory/Foundational

Jamie McMahon, CFRE, MA

Community College of Allegheny County - CEO, CCAC Educational Foundation

Sun, Apr 27, 2025

9:00am - 10:15am

Room 343 - 344

**5 Key Leadership Strategies To Empower Your Team To Level Up! And Deliver Results**

This creative and high energy interactive session will address key leadership strategies that are critical in positioning your team for success! Barbara and Joy's unique blend of leadership styles incorporate relationship strategies, ethics and storytelling techniques that have helped position fundraisers for success in closing major and principal gifts.

Education Track(s): Leadership and Management

Audience: Strategic

Barbara Tartaglia-Poure, ACFRE, AFP Certified Facilitator (formerly AFP Master Trainer), MLS

Carter Global - Managing Director

Joy McKee, ACFRE, MBA

Boston University - Assistant Dean for Development and Alumni Relations, Arts & Sciences

Sun, Apr 27, 2025

9:00am - 10:15am

Room 320-322

**Demystifying and Leveraging Donor Advised Funds for Your Nonprofit**

Donor Advised Funds are "all the rage," yet there continues to be confusion about to how to best leverage this trend for the benefit of their organization. This session will share more about "who" is using them, "how" they are being used, and "what" nonprofits can do to find success.

Education Track(s): Relationship Building

Audience: Applied

Jeremy Wells, CFRE, MA

The Saint Paul & Minnesota Foundation - Senior Vice President of Philanthropic Services

Sun, Apr 27, 2025

9:00am - 10:15am

Room 345 - 346

**Unlock The Secret to Explosive Nonprofit Growth (Presented by CharityEngine)**

Is your nonprofit ready to scale up and make a significant impact? One powerful strategy can transform your growth trajectory: expanding and refining your monthly giving program. Monthly donors provide a steady, predictable revenue stream that fuels your mission and builds deeper connections with supporters. In this dynamic session, seasoned experts Dave Martin of CharityEngine and Dana Bunke of Easterseals will take you through a comprehensive, actionable roadmap for creating and optimizing a successful monthly giving program. You'll gain insights into how to build a loyal donor base, leverage innovative tools, and maximize revenue retention.

Education Track(s): Securing the Gift

Audience: Applied

Dana Bunke

Easterseals - Senior Vice President of Direct Response and Integrated Fundraising

Dave Martin

CharityEngine

Sun, Apr 27, 2025

9:00am - 10:15am

Room 347 - 348

**Expanding Your Donor Base: Advocating for Disability Inclusion and Access**

Elizabeth Ralston and Troy Coalman are professionals with disabilities who are passionate about helping organizations incorporate accessibility and inclusion principles into every facet of an organization. In this session, you will learn about implicit bias and be equipped with strategies to engage people with disabilities as donors, including older people.

Education Track(s): Relationship Building

Audience: Introductory/Foundational

Elizabeth Ralston, MPH

Elizabeth Ralston Consulting, LLC - Elizabeth Ralston Consulting, LLC

Troy Coalman

Henry Art Gallery at the University of Washington - Senior Fundraising Executive & Accessibility Advocate

Sun, Apr 27, 2025

9:00am - 10:15am

Room 420 - 422

**Collective Resilience: Navigating the Shared Leadership Journey**

Join our panel discussion on the transformative shared leadership model in the nonprofit sector, featuring the co-executive directors of the Seattle Chinatown International District Preservation & Development Authority (SCIDpda) and their executive leadership coach, who will discuss their journey as a dynamic case study on how co-leadership enhances sustainability.

Education Track(s): Leadership and Management

Audience: Strategic

Jaron Bernstein, MBA

Alford Group - Senior Consultant

Jamie Lee, MSW, MPA

Seattle Chinatown International District Preservation & Deve - Co-Executive Director

Jared Jonson

Seattle Chinatown International District Preservation & Deve - Co-Executive Director

Anh Vo, MA

Alford Group - Chief Culture Officer

Sun, Apr 27, 2025

9:00am - 10:15am

Room 427 -429

**Navigating New Horizons: Leveraging Data Insights from FEP Q4 2024 for Enhanced Fundraising Effectiveness**

Join a team assembled by FEP to hear the latest research from the initiative's Q4 2024 report. This session brings together experts and seasoned fundraising practitioners to discuss the latest trends and data insights that will inform and enhance your fundraising strategies, helping you make informed, growth-oriented decisions.

Education Track(s): Current and Prospective Donor Research

Audience: Introductory/Foundational

Meena Das, Master of Science

NamasteData - CEO

Woodrow Rosenbaum

GivingTuesday - Chief Data Officer

Tim Sarrantonio, MA

Neon One, LLC - Director of Corporate Brand

Alice Ferris, ACFRE, CFRE, MBA

GoalBusters Consulting - Partner

Sun, Apr 27, 2025

9:00am - 10:15am

Room 433-434

**Building Workforce Strength Through Mental Health: Helping Organizations Prioritize Wellness**

The focus of this session is to highlight the current mental health crisis and the role of organizations in addressing the mental health needs of their workforce. We will address ways to be proactive in terms of current review policies and programs. Highlighted will be the implementation of innovative professional development and wellness programs. The goal is for organizations to optimize functioning by supporting the mental health and well-being of employees.

Education Track(s): Leadership and Management

Audience: Applied

Linda McGhee, JD, Psy.D.

McGhee and Associates - Clinical Psychologist

Sun, Apr 27, 2025

9:00am - 10:15am

Signature Room

**Transforming Philanthropy: How to Implement Community-Centric Fundraising for Equitable Impact**

This presentation will provide attendees with a comprehensive understanding of Community-Centric Fundraising, its historical context, and practical strategies for implementation. By featuring diverse perspectives from experienced professionals and incorporating recent research, the session will equip fundraisers with the knowledge and tools to create more equitable and impactful philanthropic practices.

Education Track(s): Relationship Building

Audience: Applied

Shannon Wong

DESC - Senior Manager of Individual Giving

Maya Hemachandra, CFRE, MPA

Sambar Nonprofit Solutions, LLC - Owner & Principal

Anna Guerrero

Urban Family - Director of Development and Communications

Briony Ball, MPH

DESC - Director of Fund Development

Sun, Apr 27, 2025

9:00am - 10:15am

Room 423 - 425

**Donor Development Conversations – Nurturing Donor Relationships at Every Stage of the Fundraising Cycle**

As fundraisers, managing prospect pipelines can feel overwhelming. With thoughtful preparation, however, fundraisers can confidently and intentionally implement personalized cultivation strategies with qualified, like-minded prospects and secure sustained support. Lasting donor relationships begin with intentional, one-on-one conversations. When you implement prospecting strategies in every step of the donor cycle, you uncover prospects' giving motivators, deepen your relationships, and create meaningful giving opportunities. Through hands-on practice with real-world scenarios, participants will: Establish a prospect research strategy. Develop effective questioning approaches. Activate key stakeholders (board, volunteers) to support prospecting and cultivation. Align donor passions with impactful outcomes to foster support.

Education Track(s): Relationship Building

Audience: Introductory/Foundational

Pearl Hoeglund, MBA, CFRE

Fundraising Academy at National University - Director

Jarrold Williams, CFRE, MBLI

Jack Alotto, CFRE, MA

Fundraising Academy at National University - Trainer

Sun, Apr 27, 2025

9:00am - 10:15am

Room 331-332

**AI for Good: Enhancing Fundraising and Productivity in Nonprofits (Presented by Microsoft)**

Can AI really help with daily fundraising tasks? Join us for an engaging session where leaders from Big Brothers Big Sisters Puget Sound dive into their day-to-day AI journeys. From streamlining grant writing to enhancing donor communication and summarizing extensive reports, AI is making a significant impact. This session will provide real-world insights into how AI is boosting productivity and efficiency, allowing nonprofit staff to focus on what truly matters: building relationships and driving strategic initiatives.

Education Track(s): Leadership and Management

Audience: Introductory/Foundational

Alonda Williams

Big Brothers Big Sisters of Puget Sound - President and CEO

Chuck Sigmund

Sun, Apr 27, 2025

9:00am - 10:15am

Room 327-329

**Continuing the Conversation On Being An Equitable, Inclusive, and Diverse Leader**

You are invited to reflect on some of your biggest challenges that can be approached and resolved from an inclusive, diverse, and equitable lens. 100% of the panelists in this session have lived experiences, and will position you for personal and professional IDEA success!

Education Track(s): Leadership and Management

Audience: Applied

Ana Luisa Ramirez, MBA, AFP Certified Facilitator (formerly AFP Master Trainer)

Gestión Filantrópica SC - Consultora

Majoy Camberos

Casa Hogar Ana Maria Casillass Cruz - Special Projects Manager

Don Baker, AFP Certified Facilitator (formerly AFP Master Trainer)

FAME, Inc. - Chief Executive Officer

Michael Baker, CFRE

m3 Development - Partner & Founder

Sun, Apr 27, 2025

10:45am - 12:00pm

Room 320-322

### **How to Build the Plan While You're Flying It!**

Join our dynamic educational session tailored for fundraising professionals seeking to craft a detailed fundraising plan while juggling day-to-day duties. This workshop will arm you with powerful strategies and tools to refine your planning process, enabling the creation of effective fundraising initiatives without compromising your ongoing projects.

Education Track(s): Leadership and Management

Audience: Introductory/Foundational

Robin Kasel, CFRE

Cornerstone Consulting Solutions LLC - Owner

Alice Ferris, ACFRE, CFRE, MBA

GoalBusters Consulting - Partner

Sun, Apr 27, 2025

10:45am - 12:00pm

Room 327-329

### **The Art of HBCU Philanthropy**

Are you seeking to build a more inclusive and diverse philanthropic ecosystem? Join in on the discussion of the Art of HBCU Philanthropy to explore innovative approaches being deployed within the HBCU ecosystem.

Education Track(s): Securing the Gift , Rebels, Renegades and Pioneers

Audience: Strategic

Daryl Graham

Strada Education Foundation - Senior Vice President of HBCU and Engagement

Vita Pickrum, PhD

Delaware State University - Vice President, Division of Institutional Advancement and President

Trina Bilal, MBA

KTB Consulting, LLC - Principal Consultant

Sun, Apr 27, 2025

10:45am - 12:00pm

Room 333-334

**How Australia's Largest Domestic Charity Grew its Digital Fundraising by 298%+ from \$6.4M to \$25.5M**

In the past 4 years, the Salvation Army Australia has undergone radical digital transformation, increasing digital fundraising by 250%+ and moving its donor base from legacy donors to younger donors. Learn the insights, tests applied and strategies behind how digital is powering up every part of the Salvos' fundraising.

Education Track(s): Current and Prospective Donor Research

Audience: Applied

Kyle Vermeulen

ntegrity - Creative Director

Janine Kewming

The Salvation Army (Australia) - National Head of Fundraising

Sun, Apr 27, 2025

10:45am - 12:00pm

Room 335 - 336

**Cognitive Impairment in Donors: What You Need to Know**

With 1 in 7 people ages 72+ showing signs of cognitive impairment, it's inevitable that you and your organization will encounter elderly donors in cognitive decline. Are you prepared to handle this situation? This session will teach you actionable best practices for managing situations of cognitive impairment in elderly donors.

Education Track(s): Ethics, Accountability and Professionalism

Audience: Introductory/Foundational

Tara Adams, JD, Ed.M.

North Carolina State University - Director of Philanthropy

Anthony Pomonis, CFRE

University of Central Florida - Executive Director of Advancement

Sun, Apr 27, 2025

10:45am - 12:00pm

Room 431-432

**Two Causes, One City: Collaboration and Competition in the Context of Major Campaign Fundraising**

Are philanthropic sectors all the same in practice? What can be learned from one another? Hear the lessons from two leading institutions undertaking their largest fundraising campaigns ever in the same geography, for two different causes, with two very different cultures, BUT with the same donors and volunteers.

Education Track(s): Leadership and Management

Audience: Applied

Laureen Bardou, CFRE, MA

Montreal Museum of Fine Arts Foundation - Senior Director, Philanthropy

Amanda Fritz, CFRE, MPNL

CHU Sainte-Justine Foundation - Director, Major Gifts and Campaign Tracking

Sun, Apr 27, 2025

10:45am - 12:00pm

Room 343 - 344

**Meaningful Risk: Navigating Vulnerability and Transparency in Fundraising**

Join us for a thought-provoking session on the intricate relationship between vulnerability, transparency, and ethical fundraising practices. Through interactive, lived, real-life examples, uncover how embracing vulnerability can foster deeper connections with donors while maintaining ethical standards--no matter your role in the organization.

Education Track(s): Ethics, Accountability and Professionalism

Audience: Applied

Kristen Bierma

Beacon Hill - Executive Director

Becky Chambless, CFRE

Ember Consulting, LLC - President

Sun, Apr 27, 2025

10:45am - 12:00pm

Room 347 - 348

**Unlocking Donor Generosity: Crafting Your Annual Stewardship Plan**

Receiving a gift is just the beginning! Learn proven strategies to cultivate lasting donor relationships, increase retention, and boost support for your organization's mission. Gain practical insights, participate in our interactive discussions, and leave with a template to create your own annual stewardship plan. Elevate your fundraising efforts today!

Education Track(s): Relationship Building

Audience: Applied

Sara Leonard, CFRE, MBA

Sara Leonard Group - CEO

Debbie Sokolov, CFRE, MNA

The James Museum of Western and Wildlife Art - Deputy Director for Development & Communications

Sun, Apr 27, 2025

10:45am - 12:00pm

Room 427 -429

**How the Tax Cuts and Jobs Act Will Impact Charitable Giving**

Absent Congressional action, trillions of dollars of tax relief will expire at the end of 2025. Learn how to prepare for/navigate massive tax reform, and a once in a generation opportunity to pass a universal charitable deduction. You'll learn how advocacy can help avoid hastening historic declines in giving.

Education Track(s): Volunteer Involvement

Audience: Strategic

Lisa Chmiola, CFRE, AFP Certified Facilitator (formerly AFP Master Trainer), MS, CSPG

Loyola University in New Orleans - Assistant Vice President of Development

Sally Schaeffer, MA  
Uncorked Advocates - Principal Consultant  
Nicole Weingartner, Registered Lobbyist  
Davidoff Hutcher & Citron LLP - Director, State Government Relations

Sun, Apr 27, 2025

10:45am - 12:00pm

Room 433-434

**The Art and Science of Neurophilanthropy - intersecting neuroscience, psychology and sociology with philanthropy**

Eric will leverage his combined 25+ years of work, education, and hundreds of millions of dollars raised to help explore the emerging field of neurophilanthropy, the confluence of neuroscience, psychology, and sociology within fundraising. You will leave knowing how to leverage your donors' identities for better engagement and fundraising.

Education Track(s): Relationship Building

Audience: Applied

Eric Frans, CFRE

NeuroImprints - Vice President of Philanthropy

Sun, Apr 27, 2025

10:45am - 12:00pm

Room 420 - 422

**From Young Pro to Emerging Leader: How to Maximize AFP to Build Your Career!**

What we are hearing: "Emerging Leaders are jack-of-all-trades, masters of none." With a projected 10-year growth in the fundraising profession of 14%, emerging leaders need to strategically maximize their growth potential. Hear how four young, diverse professionals catapulted their careers by maximizing their professional experience to become leaders.

Education Track(s): Leadership and Management

Audience: Applied

Allison Plattsmier

Jordan Thomas Foundation - Executive Director

Jarrod Williams, CFRE, MBLI

Dzenan Berberovic, CFRE, MA

Avera Health - Chief Philanthropy Officer

Sun, Apr 27, 2025

10:45am - 12:00pm

Room 323-325

**Meeting Donors Where They Are to Unlock More Support (Presented by Classy)**

Nonprofit fundraising is evolving. Learn how digital communities like GoFundMe are transforming donor engagement by breaking traditional silos, empowering supporters, and creating new channels for community-driven generosity.

Education Track(s): Securing the Gift

Audience: Strategic

Michelle Boggs

Classy - Executive Nonprofit Industry Advisor

Sun, Apr 27, 2025

10:45am - 12:00pm

Room 423 - 425

**Driving Dollars: How to Maximize Your Golf Tournament's Sponsorships (Presented by GolfStatus)**

Sponsorships are the heart of a golf tournament's fundraising power. This session is a sponsorship deep dive—from crafting a great pitch to building irresistible packages to post-tournament follow-up. You'll leave with a game plan to crush your sponsorship goals and ideas so good, your sponsors won't be able to resist

Education Track(s): Securing the Gift

Audience: Introductory/Foundational

Logan Foote

Golfstatus - Sales and Education Director

Sun, Apr 27, 2025

10:45am - 12:00pm

Room 331-332

**20 Years of Women's Philanthropy Research: Implications for Growing Giving By and For Women**

Building on two decades of research on gender and philanthropy, this session will highlight unique insights from the Women's Philanthropy Institute's new research on trends in women's philanthropy since 2000. Attendees will learn about the driving forces behind these changes and gain practical strategies for engaging women in philanthropy.

Education Track(s): Current and Prospective Donor Research

Audience: Applied

Jacqueline Ackerman, MA

Indiana University Lilly Family School of Philanthropy - Interim Director, Women's Philanthropy Institute

Sun, Apr 27, 2025

10:45am - 12:00pm

Room 345 - 346

**The RIGHT Approach to Fundraising Hasn't Changed-How Do We Scale It? (Presented by Kindsight)**

Taking a personalized, human-centered approach to fundraising that connects your organization's story to a donor's story is the dream. But achieving that while scaling up outreach and campaigns, driving operational efficiency, and navigating the changing philanthropic landscape can feel impossible with the disparate tools currently in your arsenal. It's time to embrace a new, consolidated, process. With 27 years of experience across various fundraising sectors, Matt Wahrhaftig now serves as Director of Philanthropy at Kettering Health Foundation, a rapidly expanding hospital system Matt will join Kindsight VP Cherian Koshy for an in-depth conversation about where fundraising is headed.

Education Track(s): Relationship Building

Audience: Applied

Cherian Koshy, CFRE

Kindsight - Vice President

Matt Wahrhaftig, CFRE  
Kettering Health Foundation - Director of Philanthropy

Sun, Apr 27, 2025  
10:45am - 12:00pm  
Signature Room

**Resilient Leaders: Fundraising Strategies in Uncertain Times (Presented by Better World)**

Join BetterWorld co-founder Colin Hunter at Resilient Leaders to explore smart, stable fundraising in uncertain times. Learn how mission-driven focus, clear communication, and proven strategy can keep donors engaged and your team grounded—no matter the climate. Walk away with actionable tips to lead with confidence and clarity.

Education Track(s): Leadership and Management

Audience: Applied

Colin Hunter

BetterWorld - Co-Founder

Sun, Apr 27, 2025  
11:15am - 11:45am  
Learning Lab 2

**How to Leverage Wealth Intelligence to Secure the Wallet Share of the Next Generation (Learning Lab) Presented by Altrata**

The philanthropic landscape is evolving, and with \$31 trillion in wealth set to be transferred by 2033, the opportunity to connect with the next generation of influential donors has never been greater. But how do you identify and engage these future donors effectively? Join us for an insightful session where we'll explore how Altrata's cutting-edge wealth intelligence can empower your organization to uncover, understand, and engage high-value prospects with precision. Discover how data-driven insights help organizations like yours navigate the Great Wealth Transfer, maximize wallet share, and develop strategic donor relationships.

Matt Thompson

Altrata – WealthEngine, Wealth-X, and RelSci - Vice President of Sales for Education and Healthcare North America

Sun, Apr 27, 2025  
12:00pm - 12:30pm  
Learning Lab 2

**Write Smarter, Not Harder: Winning Grants with AI-Powered Proposals (Learning Lab) Presented by Instrumentl**

This session explores what drives success, where AI falls short, and how nonprofits can use it to craft stronger proposals, faster. With real-world case studies and a hands-on demo, you'll leave with immediately actionable strategies.

Audience: Applied

Devon Jackson

Instrumentl - Senior Account Executive

Sun, Apr 27, 2025  
12:45pm - 1:15pm  
Learning Lab 2

**The Retail Therapy Effect: Make Monthly Giving Too Good to Pass Up (Learning Lab) Presented by Donorbox**

Education Track(s): Securing the Gift

Jena Lynch

Donorbox - Education & Community Engagement Manager

Sun, Apr 27, 2025

3:15pm - 3:45pm

Learning Lab 2

**Fighting the Fundraising Flames: How Analytics and Insights Can Help You Achieve Your Development Goals (Learning Lab) Presented by Altrata**

In today's nonprofit landscape, organizations are facing an unprecedented convergence of challenges—shrinking federal funding, the growing frequency of natural disasters, and intense competition for donor dollars. In this session, we will dive into how nonprofits can rise above the noise and adapt to this volatile environment. By harnessing the power of Altrata's data-driven insights nonprofits can not only survive but thrive during times of crisis. Learn how Altrata's comprehensive analytics provide actionable insights that allow nonprofits to target the right donors, optimize fundraising strategies, and maximize impact. Whether you're navigating the urgent needs of disaster relief or trying to secure consistent funding in a saturated market, Altrata's solutions offer the clarity needed to make smarter decisions, engage the right supporters, and overcome the obstacles in front of you.

Katerina Lauer

Sun, Apr 27, 2025

3:15pm - 3:35pm

Tech Zone

**The Innovation Playbook for Nonprofits: Using Data & Automation to Drive Giving (Presented by Virtuous)**

Gabe Cooper

Virtuous Software - CEO

Sun, Apr 27, 2025

3:15pm - 3:45pm

Learning Lab 1

**Explore The State of Blackbaud Raiser's Edge NXT (Learning Lab) Presented by Blackbaud**

Dive into the latest updates with Blackbaud Raiser's Edge NXT, including the efficient new homepage and integrated Prospect Insights. Uncover how to enhance and personalize your interactions with your supporters in an instant. Designed for frontline fundraisers, this session breaks down the latest in the world's most powerful CRM.

Audience: Applied

Dan Wright

Blackbaud

Sun, Apr 27, 2025

4:00pm - 5:15pm

Room 320-322

**From Donor-Centered to Community-Centered Fundraising: Results and Learnings from a National Study**

Community Centric Fundraising (CCF) is an emerging movement, but does it work? Hear the results of a national study exploring how organizations are aligning fundraising with social justice

and racial equity values. This session will share results including trends, impact on donor support, and key lessons for shifting culture.

Education Track(s): Leadership and Management

Audience: Strategic

Elizabeth Dale, PhD

Grand Valley State University - Frey Foundation - Chair for Family Philanthropy

Maya Hemachandra, CFRE, MPA

Sambar Nonprofit Solutions - Owner & Principal

Sun, Apr 27, 2025

4:00pm - 5:15pm

Room 331-332

### **How to Ensure Donor Retention Success**

Are you seeing low donor retention numbers year after year? Spending thousands of dollars annually to acquire new donors? We will share some of our successes in donor retention in hopes of igniting a thoughtful, engaging conversation in which participants leave with some new tools for their organizations.

Education Track(s): Current and Prospective Donor Research

Audience: Applied

Justin Duran, CFRE

Child Crisis Arizona - Vice President of Development & Communications

Sun, Apr 27, 2025

4:00pm - 5:15pm

Room 333-334

### **A Guided Discussion on AI Equity, Adoption, and Utilization in the Workplace**

AI is changing fast but are nonprofits keeping up? Discover how you can approach AI to leverage greater capacity. You will gain practical insights and team strategies to begin thinking through what types of work should be transitioned to AI, while which should stay on the “human side” of work.

Education Track(s): Leadership and Management

Audience: Strategic

Meena Das, Master of Science

NamasteData - CEO

Michelle Flores Vryn, CFRE

iNaturalist - Head of Development

Sun, Apr 27, 2025

4:00pm - 5:15pm

Room 431-432

### **Put on Your CAP© & Get in Your CAR©: Steering Portfolios in the Right Direction**

Do you have a plan to identify who should be in your portfolio and why? Have you determined a pathway for meaningful relational engagement that is both structured and flexible? Join this session to get the tools you need to be more effective in raising much-needed funds for your organization.

Education Track(s): Securing the Gift

Audience: Strategic

Julie Upham, CFRE

Conservation International - Vice President, Individual Giving  
Martha H Schumacher, ACFRE, CFRE, MInstF  
Hazen and HILT - Hazen and HILT

Sun, Apr 27, 2025

4:00pm - 5:15pm

Room 347 - 348

**Beyond the Pride Flag: Understanding the Complex Dynamics of Philanthropy in the LGBT Community**

How the LGBT community interacts with philanthropy is important for any fundraising professional to understand. You will learn about the changing face of LGBT philanthropy from a donor's and organization's perspective. You will come away with a deeper understanding of how to appeal to this community beyond Pride Month.

Education Track(s): Relationship Building

Audience: Strategic

Charles Callihan, MA

Heart Strategy Impact - Founder & CEO

Brian Williams, MFA

Dandelion Consulting - Founder and CEO

Sun, Apr 27, 2025

4:00pm - 5:15pm

Room 427 -429

**Red Flags in Fundraising – Been There, Done That (Unfortunately)**

This session will equip nonprofit leaders with the insights needed to navigate the complexities of ethical fundraising. Discover practical strategies from leading experts in the field and engage in meaningful dialogue about maintaining the highest standards of ethical practice in your fundraising efforts.

Education Track(s): Ethics, Accountability and Professionalism

Audience: Strategic

Mary Doorely Simboski, ACFRE, MS

Changing Our World - Senior Managing Director

Scott Staub, ACFRE, AFP Certified Facilitator (formerly AFP Master Trainer), MPA

Brakeley Search - Managing Director

Joy McKee, ACFRE, MBA

Boston University - Assistant Dean for Development and Alumni Relations, Arts & Sciences

Benjamin Mohler, ACFRE, CFRE, MA

GivingThree - Chief Executive and Principal Consultant

Sun, Apr 27, 2025

4:00pm - 5:15pm

Room 433-434

**Shifting the Paradigm Landscape: Increasing Engagement and Philanthropy Among Alumni of Color**

This presentation will allow participants to assess their organization's diverse constituency landscape and establish a diversity, equity, and inclusion action plan to embed into their current fundraising initiatives. Participants will leave with the building blocks to create an action plan to improve the donor engagement and giving within their organization.

Education Track(s): Relationship Building

Audience: Introductory/Foundational

Alyssia Coates, Ph.D., PhD

Brown University - Brown University

LaDaniel Gatling II, MA, CFRM

Guilford College - Vice President for Advancement and Alumni Relations

Sun, Apr 27, 2025

4:00pm - 5:15pm

Room 423 - 425

**Bias in Your Fundraising Data: Identify, Mitigate, and Grow (Presented by Fundraise Up)**

Discover how to break free from outdated donor stereotypes and expand your nonprofit's reach.

This session will reveal cutting-edge technologies to overcome internal biases and create a sustainable, future focused fundraising roadmap. Don't miss the chance to revolutionize your donor strategy and drive impactful change!

Education Track(s): Securing the Gift

Audience: Applied

Salvatore Salpietro

Fundraise Up - Chief Community Officer

Sun, Apr 27, 2025

4:00pm - 4:30pm

Learning Lab 1

**Win More Grants with AI: Incorporating AI Change Management to Boost Your Grant Program (Learning Lab) Presented by FreeWill**

Discover how AI is transforming grant writing and nonprofit fundraising while gaining practical insights for implementing AI in your organization.

Carrie Noble, JD

FreeWill - International Account Executive

Lisa Maxwell-Frieden, JD

Freewill - Account Executive

Sun, Apr 27, 2025

4:00pm - 5:15pm

Signature Room

**Meaningful Philanthropy in the 21st Century: The Role of Self in Giving by the Wealthy**

The AFP Foundation proudly presents the 2025 Skystone Research Prize winner, Dr. Jen Shang.

During the session, Dr. Shang will explore the findings of a significant new study of high-net-worth philanthropists. The study examines why these individuals give. More critically, "WHO they are" when they give and how their experience of giving makes them feel, shaping the meaning they derive from their giving.

Education Track(s): Relationship Building

Audience: Applied

Jen Shang

Institute for Sustainable Philanthropy - Co-Director

Sun, Apr 27, 2025

4:00pm - 5:15pm

Room 335 - 336

**An Eventful Discussion: Exploring the Future of Fundraising Events (Presented by OneCause)**

Pull up a chair and join fundraising event experts, planners, and auctioneers for an insightful panel discussion on the latest trends and challenges in event fundraising. Explore strategies to adapt to changing donor preferences, leverage technology, and stay agile, helping your nonprofit navigate and thrive in today's event fundraising environment.

Education Track(s): Current and Prospective Donor Research

Audience: Applied

Mike Wilkinson

Human Rights Campaign - Deputy Director of Events

Jennifer McNulty, MA

TaylorMade Experience - VP of Talent Acquisition

Samantha Swaim

Swaim Strategies - Founder

Emily Newberry

OneCause - VP of National Accounts

Sun, Apr 27, 2025

4:00pm - 5:15pm

Room 323-325

**Build Donor Trust To Raise More: Fundraising and Finance Collaboration (Presented by Blackbaud)**

Unlock the secrets to donor trust! Join us to learn actionable strategies for showcasing your nonprofit's transparency. Master the art of collaboration between Fundraising and Finance to present a transparent financial story. You'll get actionable steps and real-life examples to transform your approach to grow lasting donor relationships.

Education Track(s): Leadership and Management

Audience: Introductory/Foundational

Heather LeVan

Blackbaud - Principal Product Marketing Manager

Sun, Apr 27, 2025

4:00pm - 5:15pm

Room 420 - 422

**Back to the Future in your Next Fundraising Plan: Techniques for Near-Term & Long-Term Fundraising Growth (Presented by Bloomerang)**

Hop in our fundraising DeLorean! "Roads? Where we're going, we won't need roads!" Join us to future-proof your 2025 plan. We'll navigate data, strategy, and AI, ensuring your fundraising hits 88 mph towards sustainable success. No flux capacitor required, just your brilliant mind!

Education Track(s): Current and Prospective Donor Research

Audience: Applied

Clay Buck, CFRE, AFP Certified Facilitator (formerly AFP Master Trainer), MFA

TCB Fundraising - Founder and Principal

Ann Fellman

Bloomerang - Chief Marketing Officer

Hannah Berger, CFRE

The Philanthropy Coach, LLC - President, The Philanthropy Coach  
Alice Ferris, ACFRE, CFRE, MBA  
GoalBusters Consulting - Partner

Sun, Apr 27, 2025

4:00pm - 5:15pm

Room 345 - 346

**Who are “Those People?”: Trauma-Informed Storytelling for Brighter Futures**

What happens when we share stories of people like they’re people? What if we stop saying words like “working poor” and focus on words that emphasize empowerment, strength, inclusivity, and resilience? You’ll learn about the principles of trauma-informed care, hope, and how you can share supportive, strengths-based stories to fundraise.

Education Track(s): Relationship Building

Audience: Applied

Sarah Rahhal, LCSW

Sunbeam Family Services - Chief Executive Officer

Colleen Howe

Sunbeam Family Services - Grants Specialist

Angie Doss

Sunbeam Family Services - Chief Development and Marketing Officer

Sun, Apr 27, 2025

4:00pm - 5:15pm

Room 327-329

**AFP’s New Code of Ethic- What is it ... what can it do for me?**

Why do professionals and professions need an Ethical Code? AFP’s Code of Ethics is a living document and baseline that provides structure, guidance and support – for all of these. Participants will review and explore the new code and all the supporting resources available for individuals and chapters to use to develop a deeper understanding of applying and implementing the code in personal and organizational practice. Using interactive cases and group activities, Participants will apply the code – and discuss why there are very few “cut and dried” solutions.

Education Track(s): Ethics, Accountability and Professionalism

Audience: Strategic

Audrey Kintzi, ACFRE, MA, AFP Certified Facilitator (formerly AFP Master Trainer), FAFP

Saint Mary's University of Minnesota - Vice President, Emerita for Advancement and Executive Director of the M. A. in Philanthropy and Development Program

Roberta Healey, ACFRE, MBA, AFP Certified Facilitator (formerly AFP Master Trainer), FAFP

Aurora Philanthropic Consulting - Founding Member

Mon, Apr 28, 2025

8:00am - 9:15am

Room 320-322

**Do you have to ASK? YES! ...and No!**

"How do I ask for major gifts?" That depends on your relationship! Join ASK Experts Pam and Marcy to journey from strangers to cherished benefactors. Learn to ask to grow relationships from FIRST appointment to comfortable conversations leading to major investments. Marcy will sing. Pam will shine!

Education Track(s): Securing the Gift

Audience: Applied

Pamela Perkins Dwyer, MA, CFRM

Los Angeles Master Chorale - Director of Major Gifts

Marcy Heim, CFRE, AFP Certified Facilitator (formerly AFP Master Trainer), CSP - Certified Speaking Professional, PLCC Professional Life Coaching Certification UW Madison

The Artful Asker - CEO

Mon, Apr 28, 2025

8:00am - 9:15am

Room 327-329

### **Using Storylistening and Storyweaving to Discover Donor Values and Raise More Gifts**

Transform your fundraising! In this session, learn to unlock the power of connection-based fundraising through Storylistening and Storyweaving. Deepen donor relationships as you uncover their personal stories, values, and identities. Then, through conversation, learn to weave them together with mission impact for irresistible asks and successfully secured major gifts.

Education Track(s): Relationship Building

Audience: Strategic

Beth Ann Locke, AFP Certified Facilitator (formerly AFP Master Trainer)

The Fundraiser Coach - Chief Spark

Mon, Apr 28, 2025

8:00am - 9:15am

Room 335 - 336

### **The Campaign Doctor - How to Treat an Ailing Campaign**

Almost every campaign -- whether it is an annual fund drive or capital campaign -- can hit a plateau, or start to fall apart completely. In this interactive session, we'll review proven tactics that you can implement if it looks like you won't make your goal.

Education Track(s): Securing the Gift

Audience: Strategic

Caroline Bott, MPA

Virginia Fundraising Consultants - Senior Executive Consultant

Virginia Thumm

Virginia Fundraising Consultants - Virginia Fundraising Consultants

Mon, Apr 28, 2025

8:00am - 9:15am

Room 345 - 346

### **Hidden Gems: Finding Legacy Prospects (and more) Within Your Database**

Data shows an organization only knows about a third of the people who have committed to legacy gifts prior to their passing- so how do you identify the two thirds you don't know about? Learn how to use the data you already have to identify ideal legacy donors.

Education Track(s): Current and Prospective Donor Research

Audience: Applied

Carolyn Soule, MS

The Nature Conservancy - Associate Director of Development for New Hampshire

Mon, Apr 28, 2025

8:00am - 9:15am

Room 420 - 422

**Brandraising: Leveraging Your Brand to Raise Funds In a Down Economy**

Leverage your brand to boost fundraising efforts in a down economy. Strong branding elevates donor engagement, lifts fundraising success, and fortifies stakeholder connections, all without stretching your budget. This session equips you with five tools to immediately uplift your brand strategy. Plus, we'll review our exclusive fundraising survey results.

Education Track(s): Securing the Gift

Audience: Strategic

Lyn Wineman

KidGlov - President and Chief Strategist

Mon, Apr 28, 2025

8:00am - 9:15am

Room 423 - 425

**Simplify: Elevate Your Fundraising with Clear Cultivation, Communication, and Strategy**

"Simplify" redefines success in fundraising. Learn to craft impactful cultivation plans, master storytelling for donor engagement, and enhance communication strategies. Streamline your approach for clarity and effectiveness, ensuring lasting impact in your fundraising efforts.

Education Track(s): Relationship Building

Audience: Introductory/Foundational

Conner Hampton

Mon, Apr 28, 2025

8:00am - 9:15am

Signature Room

**A Wide Journey: Embedding Welcome, Inclusion, Diversity and Equity in Organizational Culture**

Executive leaders, fundraisers and consultants recount lessons from one organization's multi-year journey of embedding a welcoming, inclusive, diverse and equitable culture. More than a strategic priority, this case study shares the approach used, stakeholder voices lifted, philanthropic funding secured, and outcomes achieved toward a WIDE way of being.

Education Track(s): Volunteer Involvement

Audience: Strategic

Ryan Roemerman, BS

Lexicon Strategies - Partner

Merideth Rose

Cornerstones of Care - President & CEO

Jenna Wright, MA, PhD, Certified Professional Diversity Coach (CPDC)

Dynamic Transformations LLC - Founder and Principal Consultant

Chad Harris, CAE, PhD

Cornerstones of Care - Chief Development Officer

Mon, Apr 28, 2025

8:00am - 9:15am

Room 433-434

**True Partnerships: How to Build Equitable Partnerships and How They Can Elevate Fundraising**

Funders often see partnerships between organizations as a positive sign of a collaborative community, yet partnerships as a practice are still underexplored. Join us as we learn what true partnerships look like and discuss how to build partnerships to attract values-aligned funders!

Education Track(s): Relationship Building

Audience: Applied

Liyen Chong, MFA

Movement Strategy Center - Development Assistant

Marcus Cunningham

Movement Strategy Center - Director of Institutional Giving

Mon, Apr 28, 2025

8:00am - 9:15am

Room 333-334

### **Who Needs Ethics When I've Got To Plunge The Toilet?!?!?!?**

Join us for a practical session on the hows and whys of ethical behavior when it seems to be at the bottom of the daily to-do list. Learn how ethics influences staff, volunteers, and donors and how engaging on social media ethically can boost your engagement.

Education Track(s): Ethics, Accountability and Professionalism

Audience: Introductory/Foundational

Annie Fritschner

Annie Fritschner, ACFRE, MBA - Volunteer Leader

Mon, Apr 28, 2025

8:00am - 9:15am

Room 323-325

### **Maximizing Philanthropic Impact: Stewarding Mid-Level Donors to Cultivate Major Gift Pipelines**

Dive into effective stewardship of mid-level donors to boost major gift pipelines and ensure nonprofit growth. Attendees learn to tailor strategies based on donor motivations, preferences, and capacity, fostering deeper engagement. Real-world examples demonstrate how strategic stewardship can elevate philanthropic involvement, driving sustainable fundraising success.

Education Track(s): Relationship Building

Audience: Applied

Jeff Grandy, M.Ed.

Catapult Fundraising - Vice President of Client Development

Mon, Apr 28, 2025

8:00am - 9:15am

Room 431-432

### **People-Centric Leadership for your Development Team: 7 Strategies for Fundraising Success**

Join us for an exclusive session on "People-Centric Leadership for your Development Team: 7 Strategies for Fundraising Success." Discover the power of fostering a team-driven culture, setting achievable goals, and celebrating milestones together. Learn how to listen to your team, adapt strategies, and keep everyone accountable for maximum impact.

Education Track(s): Leadership and Management

Audience: Applied

Melissa Kham, MPA

Library Foundation of Los Angeles - Chief Development Officer

Jenny Davidson-Goldbronn

Davi-Gold LLC - Founder and CEO

Mon, Apr 28, 2025

8:00am - 9:15am

Room 343 - 344

**Mission Retainable: Donor Engagement and Loyalty Strategies to Ignite a Connection and Raise More (Presented by Bloomerang)**

Boost donor loyalty! Learn actionable strategies from fundraising experts Meena Das, Barbara O'Reilly, and Chad Barger. Discover research-backed techniques to increase retention and recurring gifts. Transform your fundraising results at AFP ICON 2025!

Education Track(s): Securing the Gift , Health Care (Sponsored by DonorSearch, Curated by Advancement Resources)

Audience: Applied

Meena Das, Master of Science

NamasteData - CEO

Barbara O'Reilly, CFRE, AFP Certified Facilitator (formerly AFP Master Trainer)

Windmill Hill Consulting - Founder and Principal

Ann Fellman

Bloomerang - Chief Marketing Officer

Chad Barger

Mon, Apr 28, 2025

8:00am - 9:15am

Room 427 -429

**Fundraising Career Success: Strategies from AFP Young Professional Awardees**

Learn to navigate the fundraising career by cultivating a supportive community and advocating for necessary resources. With high turnover rates, support for young professionals is vital. Gain insights from AFP Outstanding Young Professionals on utilizing AFP, community networks, and educational resources to advance your career while preventing burnout.

Education Track(s): Leadership and Management

Audience: Introductory/Foundational

Jonathan Meagher-Zayas

Equity Warrior Strategies - Founder & Chief Strategist

Madeleine Durante

ACLU - Associate Director, Donor Acquisition & Reinstatement

Ryan Zapolski, CFRE

Smile Train - Director, Development

Mon, Apr 28, 2025

9:15am - 9:45am

Learning Lab 2

**Scaling Personalized Stewardship to Drive Greater Fundraising Impact (Learning Lab) Presented by Haku Sports**

Fundraising success comes from meaningful connections, not just reaching more donors. But how can nonprofits scale one-to-one stewardship efficiently? This interactive session explores

how technology empowers organizations to personalize donor relationships, enhance peer-to-peer engagement, and drive stronger fundraising outcomes—without overburdening their teams.

Audience: Applied

Jaclyn Levi

Haku Sports - Chief Strategy Officer

Mon, Apr 28, 2025

9:15am - 9:45am

Learning Lab 1

**AFP Membership, What's in it for me? ( Learning Lab) Presented by AFP**

Current and prospective AFP members will learn about key benefits of membership including professional development, local events, mentorship and volunteer opportunities, publications, leadership training, and more. Find out how you can maximize the value of your professional involvement while meeting your AFP peers!

Audience: Introductory/Foundational

Nakera Dumas

AFP - Senior Director of Membership at AFP Global

Mon, Apr 28, 2025

10:00am - 10:30am

Learning Lab 2

**The Relationship Loop: Stewarding Your Constituents Effectively (Learning Lab) Presented by DonorDock**

People won't stay loyal to your cause just because you've got good intentions—In this talk, Matt will share four intentional steps to continuously adapt and grow your connections. It's not some complicated blueprint, just a human approach to fostering connections that matter.

Audience: Introductory/Foundational

Matt Bitzegaio, MA, MBA

DonorDock - CEO

Mon, Apr 28, 2025

10:00am - 10:30am

Learning Lab 1

**Golf Fundraising Made Easy: Simplify Planning & Boost Results (Learning Lab) Presented by GolfStatus**

Hear how you can make your next golf event the best one yet! GolfStatus is the leading platform for charity golf tournaments and fundraisers. Discover how the intuitive platform makes organizing and executing a successful golf fundraiser easier than ever, with no-cost solutions that save time and raise more money.

Education Track(s): Securing the Gift

Audience: Introductory/Foundational

Logan Foote

Golfstatus - Sales and Education Director

Mon, Apr 28, 2025

10:15am - 11:30am

Room 323-325

**Leveraging the Art of StorySelling to Grow Your Major or Planned Giving Program**

Boost your fundraising revenue through becoming a Better StorySeller! Gain vital skills in solicitation and stewardship, refine your elevator speeches, articulate funding priorities effectively, and vividly showcase philanthropic impact. Don't miss this opportunity to enhance your fundraising prowess and secure major and planned gifts with confidence.

Education Track(s): Securing the Gift

Audience: Applied

Carlo Laurore, CFRE, CFP® CHFC® CLU® RICP® AEP® CAP®

Boy Scouts of America - Senior Vice President, Development

Mon, Apr 28, 2025

10:15am - 11:30am

Room 331-332

### **What Do Middle Donors Really Want - A Landmark Study**

Attend this important briefing on a landmark study of the attitudes and preferences of more than 5900 midlevel donors from 36 different organizations. The study has yielded critical information for fundraisers looking to recruit, retain and upgrade this loyal and generous donor group.

Education Track(s): Current and Prospective Donor Research

Audience: Strategic

Mark Rovner, JD, PCC

Sea Change Strategies - Principal

Alia McKee, MA

Sea Change Strategies - Principal

Mon, Apr 28, 2025

10:15am - 11:30am

Room 335 - 336

### **Fundraiser Burnout and Attrition - Are We Looking After Ourselves and Our Colleagues??**

Who is investing in the lifetime value of committed fundraisers and how would we do this? We are tracking footprints of self-reflected fundraising leadership to lead people, inspire lives and carry the torch of great leadership by leading through humanity. Let's explore this together.

Education Track(s): Leadership and Management

Audience: Strategic

Daryl Upsall, MA, FCIoF

Daryl Upsall International - President

Mon, Apr 28, 2025

10:15am - 11:30am

Room 431-432

### **How To Be a Game-Changing Badass**

Many of us aspire to be dynamic change agents in our work and lives. But the percentage of leaders and organizations who rate well in strategy and execution of strategy is incredibly low. In this engaging, fun and thought-provoking session, you will explore successful pathways to transformational change.

Education Track(s): Leadership and Management

Audience: Applied

Monica Grant, CFRE, MS Organizational Leadership

Monica Grant Consulting - Organizational/Fundraising Consultant

Mon, Apr 28, 2025

10:15am - 11:30am

Room 345 - 346

**Cultivate Connections: Elevate Donor Relationships Through Strategic Communication and Turnkey Tools**

Join The Philanthropy Coach Founder, Hannah Berger, and APCH Marketing Manager, Maggie Stillman, to learn how to create donor communications that are effective, and less burdensome for your team. This session includes a case study, live coaching and the opportunity to begin creating new effective, donor materials in real time!

Education Track(s): Securing the Gift

Audience: Applied

Maggie Stillman

Heluna Health - Communications Specialist

Hannah Berger, CFRE

The Philanthropy Coach, LLC - President, The Philanthropy Coach

Mon, Apr 28, 2025

10:15am - 11:30am

Room 347 - 348

**The Future of Fundraising: Adapting to the New Reality of Donor Expectations and Digital Transformation (Presented by GiveSmart by Momentive Software)**

Education Track(s): Current and Prospective Donor Research

Audience: Applied

Tirrah Switzer, MBA

Momentive Software - VP of Product Marketing

Mon, Apr 28, 2025

10:15am - 11:30am

Room 427 -429

**Beyond the Basics: Using the AFP Code of Ethics and Member Code of Conduct**

Fair and ethical conduct is the foundation of professionalism and vital to maintaining integrity in fundraising. Join members of the AFP Ethics Committee and Member Code of Conduct Committee to learn how to foster trust within our industry through the understanding and application of the new AFP Member Code of Conduct and recently updated AFP Code of Ethics.

Education Track(s): Ethics, Accountability and Professionalism

Audience: Introductory/Foundational

John Scola

Boys & Girls Clubs of the Valley - Senior Vice President of Advancement

Jaye Lopez Van Soest, CFRE

Flourishing, LLC - Principal

Amy Rowell, EdD

COA Youth & Family Centers - Executive Director

Joyce Mitchell-Antoine

WomanCare Global - VP Development

Theresa Fleck, CAE, CFRE, MA, EdD, CNP

Logan University - Vice President of Institutional Advancement

Mon, Apr 28, 2025

10:15am - 11:30am

Room 433-434

**Roots of Change: Cultivating Relationships for Grassroots and Nonprofit Startup Success**

Explore a transformative session to empower grassroots organizations and nonprofit startups through strategic relationship building. Learn practical strategies for forging alliances, engaging communities, and developing advocacy platforms that drive substantial social change. Enhance your impact by leveraging key relationships effectively.

Education Track(s): Relationship Building

Audience: Introductory/Foundational

Kimberly O'Neil, MA, MPA

Giving Blueprint - CEO

Mon, Apr 28, 2025

10:15am - 11:30am

Room 420 - 422

**Ethics and Inclusion in Action: Conversations from the Front Lines to Build Better Fundraising**

Join us for a conversation from the front-lines of fundraising with four senior fundraising executives. We will explore trust, honesty and doing the right thing. Panelists will discuss challenging situations in fundraising and share success stories where Ethics and IDEA opened the door to major gifts.

Education Track(s): Ethics, Accountability and Professionalism

Audience: Applied

Dwayne Ashley, MBA

Bridge Philanthropic Consulting LLC. - Chief Executive Officer

Paul Allen

Bridge Philanthropic Consulting - Executive Consultant

Dr. Tammy Smithers, PhD

Bridge Philanthropic Consulting LLC - Vice President of Campaigns

Sylvia White, MA

Bridge Philanthropic Consulting LLC - Bridge Philanthropic Consulting LLC.

Mon, Apr 28, 2025

10:15am - 11:30am

Room 327-329

**Using AI & Technology to Drive Small Shop Fundraising Growth**

Have you put enough science into the art and science of fundraising? Join for an interactive discussion with two seasoned fundraising professionals who used AI technology and other analytics to overhaul an organization's fundraising operation, driving significant double-digit growth.

Education Track(s): Securing the Gift

Audience: Applied

Tiffany Legington Graham, MS

Mission360 Strategies - Principal Consultant

Steve Jacobson

JCA, Inc. - Chief Executive Officer

Kenya Roberts, CFRE

United Women in Faith - Executive for Development Management

Mon, Apr 28, 2025

10:15am - 11:30am

Signature Room

**What You Don't Know Can Sink You – The Truth about Black Philanthropy**

Lack of cultural fluency is a significant barrier to the diversification of fundraising efforts and inclusionary practices in the nonprofit sector. This session aims to remove the blind spots and educate nonprofit leaders and fundraisers about the power Black fundraisers, donors, and communities wield through philanthropy.

Education Track(s): Relationship Building

Audience: Applied

Autumn Lee Cass

Green Scholars - Georgia Community Relationship Manager

Joy Webb, MBA, CAP

Southern Black Girls and Women's Consortium - Network Engagement Manager

Carla Lavender, MBA

Columns Fundraising - Senior Consultant

Christal Cherry, MA

Fabulous Female Fundraisers - Chair, Board of Directors

Ninja Miles, CFRE, CFRM

Indiana University Foundation - Director of Development, Black Philanthropy

Mon, Apr 28, 2025

10:15am - 11:30am

Room 320-322

**Make A Deeper Impact: Engage Peers and Volunteers (Presented by Blackbaud)**

successful organization is multi-faceted and well-rounded, focusing not only on donations and how they empower their cause but also on those who donate with their time and influence. Volunteers and peer-to-peer fundraisers can be just as vital to an organization as major and recurring donors. Learn how to identify, utilize, and support volunteers and peer-to-peer fundraisers at your organization. Examine the strengths and benefits each group brings to fundraising and how together these two groups can create even more meaningful impact. Discover methods on how to incorporate volunteers and peer-to-peer fundraisers into most organizational endeavors for a robust approach to fundraising.

Education Track(s): Volunteer Involvement

Audience: Applied

Matt Connell

Blackbaud - Principal Instructor

Mon, Apr 28, 2025

10:15am - 11:30am

Room 333-334

**Demystifying Donor-Advised Funds: How to connect with DAF donors (Presented by Fidelity Charitable and Seattle Foundation)**

In this session, you will learn how donor-advised funds have set new records in giving and why understanding DAF donors—and how to work with them—is a strategy every fundraiser should

perfect. You'll learn the basics of donor-advised funds, how and why donors use them, and five ways your nonprofit can reach DAF donors.

Education Track(s): Securing the Gift

Audience: Introductory/Foundational

Amy Pirozzolo

Fidelity Charitable - Head of Marketing

Taylor Sharp

Seattle Foundation - Interim Director of Philanthropic Advising

Mon, Apr 28, 2025

10:15am - 11:30am

Room 423 - 425

### **5 Ways to Develop Billion-Dollar Donor Relationships**

Ready to learn the best ways to cultivate donor relationships and attract your largest-ever gift? In this session, you'll learn five strategies to build lasting trust and focus on the impact of philanthropy through the donor's lens. This presentation will be based on the case study of a \$1B gift.

Education Track(s): Relationship Building

Audience: Applied

Karen Cochran, CFRE, MA

Philanthropy Innovators - Founder & Chief Philanthropic Innovator

Mon, Apr 28, 2025

10:20am - 10:40am

Tech Zone

### **Transforming data into meaningful insights for non-profit impact with Intuit Enterprise Suite (Tech Zone) Presented by Intuit**

Learn how Intuit Enterprise Suite can help your nonprofit stay financially compliant, manage cash flow, and get access to real-time insights to drive your mission forward.

Education Track(s): Leadership and Management , Health Care (Sponsored by DonorSearch, Curated by Advancement Resources)

Juliana Sublewski

Intuit - Group Product Manager

Mon, Apr 28, 2025

10:45am - 11:15am

Learning Lab 1

### **Simple Tools and Tactics for Better Donor Engagement (Learning Lab) Presented by DonorPerfect**

Want to improve your donor journeys but not sure where to start? There are simple ways to enhance how you engage with donors. Learn practical tactics you can implement immediately to create more meaningful donor experiences. Join Cherian Koshy, CFRE and DonorPerfect, to discover how to build effective donor journeys.

Cherian Koshy, CFRE

Kindsight - Vice President

Mon, Apr 28, 2025

11:30am - 12:00pm

Learning Lab 2

**Transform Your Nonprofit: Automate Payments, Save Time, and Focus on Impact (Learning Lab) Presented by Tipalti**

Discover how nonprofits can eliminate manual finance operations, improve their environmental footprint, and streamline global payments. Learn how to enhance invoice management, integrate with your ERP, and maintain tax compliance—all while focusing on serving your growing community more efficiently and sustainably.

Education Track(s): Leadership and Management

Audience: Introductory/Foundational

Brian Schilling, MBA

RSM - Director

Matthew Merrill, MBA

Tipalti - Sr. Manager, Partner and Industry Marketing

Corinna Creedon

Mon, Apr 28, 2025

12:15pm - 12:45pm

Learning Lab 2

**Future-Proofing Nonprofit Funding: How UNFPA is Scaling Individual Giving a Changing Landscape (Learning Lab) Presented by Delve Deeper**

Discover how UNFPA transformed its fundraising strategy to meet the changing landscape. This session reveals how a data-driven, audience-first approach scaled individual giving by 168%, ensuring resilience amidst change and challenges. Learn actionable strategies to future-proof your nonprofit's fundraising and build sustainable, diversified revenue streams.

Michael Johnston

Hewitt and Johnston Consultants - Founder and President

Mon, Apr 28, 2025

12:40pm - 1:00pm

Tech Zone

**The 7 Metrics That Matter: Benchmarking Success in Fundraising (Presented by Virtuous)**

In this session, we'll reveal key insights from the latest Virtuous Benchmark Report, exploring 7 metrics that drive fundraising success. Learn how top nonprofits use data to improve donor retention, gift frequency, and performance. Discover trends shaping the sector and gain actionable strategies for smarter, data-driven decision-making.

Gabe Cooper

Virtuous Software - CEO

Mon, Apr 28, 2025

1:00pm - 1:30pm

Learning Lab 2

**AI Agents and Automation for Fundraising (Learning Lab) Presented by Microsoft**

In today's world, fundraising innovation isn't simply a nice-to-have...it's a necessity. Join Microsoft Tech for Social Impact for a Learning Lab that takes a deep dive into the world of AI agents and how they can help fundraisers automate operational processes (so you can spend more time on what matters most – your donor community and your mission). Join us to discover how Copilot agents can revolutionize your nonprofit's fundraising approach, driving greater efficiency and success. Don't miss this opportunity to learn from industry experts and take your fundraising efforts to the next level!

Apurva Chandra, MBA  
Microsoft - Director, Modern Work Industry Advisor

Mon, Apr 28, 2025

1:15pm - 2:30pm

Room 320-322

**Eternal Gratitude: Mastering Planned Giving Donor Stewardship for Lifelong Connections**

Including Planned Giving donors in your Legacy Society is an important part of donor stewardship. But it is just the beginning: Set it and Forget it just doesn't cut it any more with donors. In this session we will show you ways to make your Planned Giving Stewardship more effective.

Education Track(s): Relationship Building

Audience: Applied

Timothy Logan, ACFRE, CFRE, AFP Certified Facilitator (formerly AFP Master Trainer), MNO, FCEP

Mal Warwick Donordigital - Senior Legacy Director

Linda Spuck

Sharp HealthCare Foundation - Senior Director of Legacy Giving

Mon, Apr 28, 2025

1:15pm - 2:30pm

Room 323-325

**Empowering Wealth Advisors as Allies in Charitable Giving**

Discover the invaluable synergy between nonprofits and wealth advisors! Dive into our session to unlock the benefits of nurturing strong advisor relationships, seamlessly integrating charitable giving into financial plans. Explore how collaboration fosters trust, amplifies impact, and empowers both donors and communities.

Education Track(s): Relationship Building

Audience: Strategic

Nicola Lawrence, CFRE, MA, CAP and Phild in process

Phoenix Children's - AVP, Philanthropic Advising

Justin Pace

Phoenix Children's - Senior Marketing Strategist

Mon, Apr 28, 2025

1:15pm - 2:30pm

Room 331-332

**Navigating Power Dynamics in Fundraising**

Most fundraisers have experienced an uncomfortable, offensive, or harmful donor interaction. This cannot just be seen as "part of the job" rather something that is addressed to create a culture and systems that build brave spaces and policies and procedures that result in greater fundraiser safety and professional satisfaction.

Education Track(s): Ethics, Accountability and Professionalism

Audience: Applied

Robert Osborne

The Osborne Group, Inc. - Principal

Laurel McCombs

The Osborne Group - Senior Advisor

Mon, Apr 28, 2025

1:15pm - 2:30pm

Room 333-334

### **Creating Departmental Framework for Ethical Storytelling**

This session advocates for ethical storytelling, emphasizing authenticity, inclusivity, and empathy. It outlines guidelines to ensure integrity, diversity, respect for privacy, avoidance of harm, and empowerment. Fostering a socially conscious narrative landscape aims to inspire positive societal change and a more equitable, compassionate world.

Education Track(s): Ethics, Accountability and Professionalism

Audience: Introductory/Foundational

Derria Ford, MBA, Ed.D

Martha O Bryan Center - Chief Development Officer

Mon, Apr 28, 2025

1:15pm - 2:30pm

Room 335 - 336

### **Give your Fundraising Program a Tune-Up!**

A healthy fundraising program requires regular check-ups! This interactive session introduces the concept of a development audit and a process for evaluating your fundraising program. You'll leave with an understanding of the audit process and a worksheet to help introduce the concept of a fundraising audit in your organization.

Education Track(s): Leadership and Management

Audience: Applied

Michelle Hamilton, CFRE

Carter - Managing Director

Mon, Apr 28, 2025

1:15pm - 2:30pm

Room 345 - 346

### **You CAN have it all: Innovative Ways to Fundraise from Individuals and Institutions**

Overwhelmed by fundraising responsibilities? Join this session to explore innovative strategies for balancing donor relations, event coordination, and grant writing. Learn to harness the major gift lifecycle effectively and equip yourself with practical tools to excel and thrive in your fundraising career.

Education Track(s): Securing the Gift

Audience: Applied

Douglas Manigault III, CFRE, DSW, MSW

Interfaith Hospitality Network at Alpha House - Development Director

Mon, Apr 28, 2025

1:15pm - 2:30pm

Room 347 - 348

### **How to Write a Grant Application That Doesn't Get Funded**

Your organization was the perfect candidate for funding from XYZ Foundation, yet was rejected, again. Why?! During this session, a funder representative who reviews more than 1,000 grant applications each year will unlock the not-so-secret-secret on why your application was not a success.

Education Track(s): Securing the Gift

Audience: Applied

Debra Faulk, CAP

Chartered Advisor in Philanthropy - Senior Philanthropic Specialist, Executive Director

Mon, Apr 28, 2025

1:15pm - 2:30pm

Room 427 -429

**Ace Donor Engagement with A Fresh Approach: The Donor Engagement Models (Presented by DonorPerfect)**

Join DonorPerfect experts to ace your engagement strategy with a fresh, original approach! Discover how to create meaningful connections with every supporter, no matter their giving capacity, using one comprehensive strategy called Donor Engagement Models. You'll walk away with real-life examples for solving common fundraising challenges—demonstrated in an interactive game!

Education Track(s): Securing the Gift

Audience: Applied

Julia Gackenbach

DonorPerfect - Communications Manager & Nonprofit Advocate

Eleanor Stasio

Mon, Apr 28, 2025

1:15pm - 2:30pm

Signature Room

**Changing the Narrative: Moving Toward Autonomy, Accountability, and Abundance in Fundraising**

What stories do our relationships with funders and donors tell? This session will explore the potential for fundraising practices to create narratives of autonomy, accountability, and abundance that can help to reshape philanthropy in service of racial equity and economic justice goals.

Education Track(s): Relationship Building

Audience: Strategic

Kathy Lindenmayer

Memphis Music Initiative - Vice President, Development & Communications

Dana James

CCF/Berklee - Community Architect

Erika Pettersen, MA

Mon, Apr 28, 2025

1:15pm - 2:30pm

Room 433-434

**Empowering Small Communities: Charting Paths to Bold Visions and Sustainable Funding**

Together, we'll explore fundamental questions that small, rural, and volunteer-run organizations can ask themselves before launching new fundraising strategies, such as grant writing or a special campaign. Come for the practical tips that you can immediately apply and stay for the stories and activities that bring to life our recommendations.

Education Track(s): Relationship Building

Audience: Applied

Julie Bianchi, CFRE, MA  
Cloudbreak Collective - Consultant & Campaign Practice Director  
Brittany Kirk, MPA  
Cloudbreak Collective - President & Grants Practice Director

Mon, Apr 28, 2025

1:15pm - 1:35pm

Tech Zone

**Right-Sized Tools for Big Impact (Presented by StratusLIVE)**

Technology should be driven by strategy, not the other way around. Let's discuss key technology choices nonprofits face today. Learn how to identify what works for your goals and what technology can empower your strategy, whether you're nurturing major donors, scaling your sustainer program, or engaging a diverse donor base.

Debbie Synder

StratusLIVE - Chief Revenue Officer

Mon, Apr 28, 2025

1:15pm - 2:30pm

Room 420 - 422

**Neurodiversity in Nonprofits: Challenges as a Fundraiser, Leveraging Your Unique Strengths, Accommodations, and Advocacy**

Are you one of the 15 to 20% of the population that identifies as neurodiverse? Join us to discuss fundraising and how your neurodiversity gives you the superpowers to succeed in the sector. How can you leverage your strengths to counter the everyday challenges of your unique brain?

Education Track(s): Leadership and Management

Audience: Applied

Nicole Bela, CFRE

Advance Illinois - Director of Development

Janessa Butler

Self-Employed - Fundraising Advisor

Mallory Erickson

Mallory Erickson Coaching LLC - CEO and Creator of the Power Partners Formula™

Mon, Apr 28, 2025

1:15pm - 2:30pm

Room 431-432

**Leading Your AFP Chapter in This Multiverse!**

What does it mean to lead a local AFP chapter today? Is membership down? Community needs ever-changing? Is your day job harder than ever? Do you find that your volunteers or colleagues are burning out? You're not alone. Join us for an energizing session where we'll tackle the real challenges facing AFP chapters in this ever-evolving landscape. Advancement Northwest will share its strategies—from pioneering co-leadership to reimagining National Philanthropy Day with a focus on our community of fundraisers.

Education Track(s): Leadership and Management

Audience: Introductory/Foundational

Hong Chhuor, CFRE

Shannon Wong

DESC - Senior Manager of Individual Giving

Javier Womeldorff, MA

The Evergreen State College - Associate Vice President, Major and Planned Giving

Shannon Bowen

Pacific Northwest Research Institute - Chief Advancement Officer

Mon, Apr 28, 2025

1:15pm - 2:30pm

Room 327-329

**GivingPulse: Applying Trends in Giving Behavior and Perspectives for Donor Engagement Strategies**

Understanding your donors and what motivates them to get and remain involved in your organization is critical for maximizing your fundraising strategies. Explore the latest research from GivingPulse, a comprehensive analysis of donor behaviors and motivations, alongside the Field Guide for a deeper dive into practical implementations of these findings.

Education Track(s): Current and Prospective Donor Research

Audience: Applied

Woodrow Rosenbaum

GivingTuesday - Chief Data Officer

Glenn McKinney

RKD Group - SVP Strategic Engagement

Victoria Leonhardt

GivingTuesday - Senior Manager - US Communities

Annie Collins

GivingTuesday - Data Scientist

Mon, Apr 28, 2025

1:15pm - 2:30pm

Room 423 - 425

**Getting Your Board on Board: How to Lead Digital Transformation Conversations with Your Stakeholders (Presented by Microsoft)**

AI is everywhere – and it's prompting questions across nonprofit staff, leadership, and board members alike. Join Microsoft Tech for Social Impact for a session designed to equip you with the tools and strategies needed to effectively communicate the value of AI and technology innovation to your stakeholders. Through practical exercises and real-world examples, you'll leave with a clear action plan to bring your board along on your technology journey.

Education Track(s): Volunteer Involvement

Audience: Applied

Christina Macchiarola, MBA, MFA

Microsoft Corporation - Global Engagement & Content Lead

Erin McHugh Saif

Microsoft Corporation

Mon, Apr 28, 2025

1:45pm - 2:15pm

Learning Lab 1

**The Secret to Donor Loyalty: Cultivation Strategies That Build Authentic Donor Relationships (Learning Lab) Presented by CCS Fundraising**

Education Track(s): Relationship Building

Audience: Applied  
Nicole Stratton, MA  
CCS Fundraising - Senior Vice President

Mon, Apr 28, 2025

1:45pm - 2:15pm

Learning Lab 2

**Unlocking Donor Potential: Leveraging Data-Driven Insights and Strategies at Girls on the Run (Learning Lab) Presented by Deloitte Consulting**

Learn how Girls on the Run applied predictive modeling and analytics to uncover insights on current donors and identify new, out of network donors. We'll delve into the so far.

Sarah Mohamed

Deloitte Consulting - Senior Data Scientist

Liz Wian

Girls on the Run - Chief Development Officer

Hillary Jarcik

Girls on the Run - Sr. Director, Individual and Foundation Relations

Mon, Apr 28, 2025

2:25pm - 2:45pm

Tech Zone

**Transforming data into meaningful insights for non-profit impact with Intuit Enterprise Suite (Tech Zone) Presented by Intuit**

Learn how Intuit Enterprise Suite can help your nonprofit stay financially compliant, manage cash flow, and get access to real-time insights to drive your mission forward.

Education Track(s): Leadership and Management , Health Care (Sponsored by DonorSearch, Curated by Advancement Resources)

Juliana Sublewski

Intuit - Group Product Manager

Mon, Apr 28, 2025

2:30pm - 3:00pm

Learning Lab 1

**Amplifying Impact with AI: How AI Supercharges Donor Engagement (Learning Lab) Presented by DonorSearch**

AI-driven fundraising isn't the future—it's the present. This session will take you inside DonorSearch, showing how predictive modeling & generative AI work together to enhance donor engagement, retention, & giving potential. Whether you're new to AI or looking to refine your strategy, this live demo will give you the insights you need.

Audience: Strategic

Scott Rosenkrans, MS

DonorSearch - Associate Vice President, DonorSearch Ai

Mon, Apr 28, 2025

3:00pm - 4:15pm

Room 333-334

**Suspect – Prospect – Donor! Demystifying Prospect Research for Major Gift Success from Identification to Gift**

Whether you are managing a large or small fundraising shop, prospect research can turn the chaos of data into smooth processes that help you close more major gifts. You will discover how to use the right amount of research to work your way through the solicitation cycle to gift

Education Track(s): Current and Prospective Donor Research

Audience: Applied

Tracey Church, MA, AFP Certified Facilitator (formerly AFP Master Trainer), MLIS

Tracey Church & Associates, Research + Consulting Services - Principal, Researcher & Consultant

Jennifer Filla

Aspire Research Group LLC; Prospect Research Institute - CEO

Mon, Apr 28, 2025

3:00pm - 4:15pm

Room 335 - 336

### **Building Trust With Your Donors: Fundraising, the Ethical Impact Profession**

In this era of misinformation and fractured political landscapes, building trust with your donors has never been more important. Policy Horizons Canada identified the top prominent disruption for 2024 and greatest threat to democracy as "people cannot tell what is true and what is not".

Join us to explore the tools developed by AFP Global and AFP Canada to help you build stronger relationships with your donors and demonstrate your commitment to truth-telling and promise-keeping. Exploring both the Narrative for Canadian Fundraisers and the newly revised AFP Code of Ethics and Standards for Professional Fundraisers.

Education Track(s): Ethics, Accountability and Professionalism

Audience: Introductory/Foundational

Jennifer Johnstone

Central City Foundation - President & CEO

Mon, Apr 28, 2025

3:00pm - 4:15pm

Room 343 - 344

### **Unlock Your Working Genius: Elevating Fundraising Teams and Productivity**

Using the popular Six Types of Working Genius framework, discover transformative insights and practical tools to reignite your joy at work, foster collaboration, and increase productivity. You'll walk away with strategies to implement immediately. Don't miss this opportunity to recharge and elevate your team's potential!

Education Track(s): Leadership and Management

Audience: Introductory/Foundational

Stacey Wedding, BoardSource Certified Governance Consultant, Working Genius Certified Facilitator

The Stacey Wedding Group - Chief Strategist

Mon, Apr 28, 2025

3:00pm - 4:15pm

Room 345 - 346

### **The Future of Sustainable Giving in a Subscription Economy**

Sustainable giving is accessible to more nonprofits than ever before. The subscription economy has transformed the landscape of sustainer programs, leading to a new kind of regular giving.

Dave Raley, author of *The Rise of Sustainable Giving: How the Subscription Economy Is*

Transforming Recurring Giving and What Nonprofits Can Do to Benefit, will unpack how recent trends have transformed monthly giving.

Education Track(s): Securing the Gift

Audience: Applied

Dave Raley

Imago Consulting - Founder

Mon, Apr 28, 2025

3:00pm - 4:15pm

Room 347 - 348

### **Unlocking Corporate Philanthropy: Proven Strategies for Securing Gifts and Mobilizing Volunteers**

Join an exhilarating session packed with actionable insights and innovative approaches for small to mid-sized nonprofits seeking to optimize their corporate philanthropy and volunteer engagement efforts. Get practical strategies, tailored guidance, and innovative techniques that can make a real difference in your fundraising and community engagement initiatives.

Education Track(s): Securing the Gift

Audience: Applied

Pinky Vincent, CFRE, MA

Clarezza Insights LLC - Principal

Mon, Apr 28, 2025

3:00pm - 4:15pm

Room 420 - 422

### **Leveraging Data, Systems, and Change to Elevate Your Nonprofit (Presented by CCS Fundraising)**

This presentation will provide a roadmap for nonprofits to elevate their performance through the integration of data, systems, and change management. Attendees will learn about the process of continuously building a foundation for data-informed strategies and decisions, which will allow them to expand their revenue growth and mission impact.

Education Track(s): Current and Prospective Donor Research

Audience: Applied

Allison Willner

CCS Fundraising - Executive Vice President, Data Strategy

Ashutosh Nandeshwar, PhD

CCS Fundraising - Senior Vice President, Data Science and Analytics

Greg Hagin

CCS Fundraising - Principal and Managing Director

Mon, Apr 28, 2025

3:00pm - 4:15pm

Signature Room

### **What fundraisers Need to Know About AI's Impact on Marginalized Communities (Presented by Alford Group)**

Join us for an interactive AI demonstration to explore how AI can shape future fundraising strategies. We'll delve into the social impacts of AI and learn how to combat bias and discrimination. Despite AI's benefits, it reflects societal biases, reinforcing discriminatory thinking. Empower yourself with the knowledge to make a difference.

Education Track(s): Leadership and Management  
Audience: Applied  
Manju Ramachandran, CFRE  
Fundraising Consultant - Director of Development  
Cherian Koshy, CFRE  
Kindsight - Vice President  
Charles Buchanan, MBA  
Technology Helps - CEO  
Gayle Roberts  
Jennifer Dotson, MSc

Mon, Apr 28, 2025  
3:00pm - 4:15pm  
Room 433-434

**Demystifying DAFs: Findings from the National Survey of DAF Donors**

Do donor advised funds (DAFs) seem like a mystery to you? The National Survey of DAF Donors provides valuable insights to help you better understand DAFs and offers practical applications for professional fundraising. You will learn how to identify DAF donors, cultivate better relationships with them, and customize solicitations.

Education Track(s): Securing the Gift  
Audience: Strategic  
Rachel Sumsion  
Brigham Young University - MPA Student  
Dan Heist, MA, PhD  
Brigham Young University - Assistant Professor

Mon, Apr 28, 2025  
3:00pm - 4:15pm  
Room 427 -429

**A Decade of LGBTQ+ Philanthropy: Trends and Implications for Funders and Nonprofits**

The Equitable Giving Lab's LGBTQ+ Index reveals that despite heightened attention to LGBTQ+ issues, giving to LGBTQ+ organizations remains a small share of overall giving. This session will unpack trends, challenges, and opportunities that have emerged in LGBTQ+ philanthropy and discuss implications for funders and nonprofits in this pivotal moment.

Education Track(s): Current and Prospective Donor Research  
Audience: Applied  
Katie Hultquist, MA  
Outright International - Director of Leadership Giving  
Jacqueline Ackerman, MA  
Indiana University Lilly Family School of Philanthropy - Interim Director, Women's Philanthropy Institute

Mon, Apr 28, 2025  
3:00pm - 4:15pm  
Room 327-329

**Fostering Inclusion: Today's Landscape and Tomorrow's Path (Presented by Men of Color in Development)**

MOCID (Men of Color in Development) has been presenting since 2021. With the guidance and collaborative partnership of AFP Global Leadership, MOCID has delivered insightful and engaging sessions focused on the experiences of Black men in development. Our sessions are discussion-based and typically do not include PowerPoint presentations, fostering healthy and thought-provoking dialogue.

Education Track(s): Relationship Building

Audience: Applied

Jill Zimmerman

Greater Chicago Food Depository - Chief Philanthropy Officer

Frank Velásquez Jr.

4 Da Hood LLC - 4 Da Hood LLC

Shane Carlin, MA

Asian Student Achievement - CEO | FOUNDER | COACH

Christopher Beck

ALSAC/St. Jude Children's Research Hospital - Senior Philanthropic Advisor, Southeast

Mon, Apr 28, 2025

3:00pm - 4:15pm

Room 323-325

**Giving Pyramid Collapse: How do MSF USA and IRC Fund Their Future? Trends, Challenges, and Tactics (Presented By Delve Deeper)**

Facing declining donor trust and rising acquisition costs, nonprofits must rethink donor engagement. Join us—alongside leaders from the Medecins Sans Frontieres USA and International Rescue Committee—for a bold, data-driven session on reversing the donor pyramid collapse. Discover how to use AI, personalization, and performance marketing to turn \$5 donors into long-term champions—sustainably and at scale.

Education Track(s): Securing the Gift

Audience: Strategic

Geoff Handy

North America at International Rescue Committee - Head of Mass Market Fundraising

Anton Lipkanou

Delve Deeper - President and Partner

Deborah Garcia

Doctors Without Borders (Médecins sans Frontières) - Chief Development Officer

Mon, Apr 28, 2025

3:00pm - 4:15pm

Room 331-332

**Learn About the Advanced Credential In Fundraising :It's Time To Get Involved in ACFRE**

The Advanced Certified Fundraising Executive (ACFRE) credential is the top credential of the fundraising process. Being certified as an ACFRE recognizes individuals who have demonstrated advanced level breadth and depth of knowledge about the fundraising practice, a commitment to leadership in the sector, and a commitment to ethical and effective professional practice. Join us for a lively and informative session to learn all about the ACFRE process—application, scholarships, mentoring. Members of the ACFRE Certification Board will explain the process and ACFRE's will answer your questions. Don't wait any longer. If you have 10 or more years of fundraising experience, NOW is the time to get involved in the ACFRE process.

Education Track(s): Leadership and Management

Audience: Strategic

Timothy Logan, ACFRE, CFRE, AFP Certified Facilitator (formerly AFP Master Trainer), MNO, FCEP

Mal Warwick Donordigital - Senior Legacy Director

Audrey Kintzi, ACFRE, MA, AFP Certified Facilitator (formerly AFP Master Trainer), FAFP

Saint Mary's University of Minnesota - Vice President, Emerita for Advancement and Executive Director of the M. A. in Philanthropy and Development Program

Mon, Apr 28, 2025

3:00pm - 4:15pm

Room 423 - 425

### **Taking Community-Centric Fundraising Global: Lessons, Laughs, and Learning**

Curious how Community-Centric Fundraising (CCF) went from a U.S. movement to a global force? Join CCF Global Council members, for a fun and insightful look at the ups, downs, and unexpected moments that shaped this journey.

Education Track(s): Ethics, Accountability and Professionalism

Audience: Introductory/Foundational

Ken Jones

Rachel D'Souza, JD

Gladiator Consulting - Founder and Principal

Meena Haque

Meena Haque is an activist, organizer, and fundraiser with over 10 years of experience in fundraising and 15 years in organizing for domestic and international campaigns. Passionate about wealth redistribution and movement building, she uses storytelling and relationship-building to inspire donors and raise funds for communities. Meena previously served as the Individual Giving Manager at UltraViolet, a national gender justice organization, and as the Development Director at the New Orleans Workers' Center for Racial Justice. At the Workers' Center, her fundraising efforts supported a COVID-19 relief fund for undocumented workers, amplified awareness of labor trafficking in crawfish processing plants.

Jennifer Brandt

Community Centric Fundraising - Global Council Membership

Mon, Apr 28, 2025

3:15pm - 3:45pm

Learning Lab 1

### **Drive More Donations With Personalized Marketing Campaigns (Learning Lab) Presented by Blackbaud**

Glen Hutson

Blackbaud - Principal Solutions Architect

Thomas Nettesheim

Constant Contact - Partner Success Manager

Mon, Apr 28, 2025

4:00pm - 5:15pm

Learning Lab 1

### **How to Become a Certified Fund Raising Executive (Learning Lab) Presented by CFRE**

The CFRE Credential: Is it worth it? What are the benefits? Is the CFRE Exam difficult? This interactive session to learn everything you ever wanted to know about the Certified Fund Raising Executive (CFRE) credential. We'll dive into the eligibility requirements, application tips, and all

things related to the CFRE Exam, as well as answer your questions. You'll leave the session with a clear understanding of how to achieve your CFRE credential.

Education Track(s): Ethics, Accountability and Professionalism

Audience: Introductory/Foundational

Eva Aldrich, CAE, PhD

CFRE International - President & CEO

Mon, Apr 28, 2025

4:00pm - 4:30pm

Learning Lab 2

**Empowering your nonprofit's mission with Intuit Enterprise Suite (Learning Lab) Presented by Intuit**

Learn how your nonprofit can benefit from an AI-powered suite that's designed to seamlessly increase productivity.

Education Track(s): Leadership and Management , Health Care (Sponsored by DonorSearch, Curated by Advancement Resources)

Nicholas Wong

Intuit - Sales Engineer

Mon, Apr 28, 2025

4:45pm - 5:15pm

Learning Lab 2

**Unlocking Donor Potential with SylogistMission CRM (Learning Lab) Presented by SYLOGIST**

Discover how AI and SylogistMission CRM innovate donor engagement and fundraising. This session covers AI-powered donor segmentation, predictive analytics, and campaign optimization. Join us for live demos, expert insights, real use cases, and a live Q&A to enhance your fundraising strategies and maximize impact.

Courtney Humbert

SylogistMission - Senior Sales Executive

Tue, Apr 29, 2025

8:00am - 9:15am

Room 320-322

**Making Sense of Fundraising: How to Thrive in 2025**

How do you make sense of what REALLY works in fundraising when there seem to be so many raise-more-money-fast promises lately? In this engaged dialogue we'll dig into the actual trends, discuss what's really working, and workshop a plan so that you can make the most impact in your work.

Education Track(s): Leadership and Management

Audience: Applied

Clay Buck, CFRE, AFP Certified Facilitator (formerly AFP Master Trainer), MFA

TCB Fundraising - Founder and Principal

Tue, Apr 29, 2025

8:00am - 9:15am

Room 323-325

**Leveraging Data-Driven Strategies to Amplify Fundraising Success!**

Join fundraising's best frenemy duo as they spar over their secrets behind research-driven fundraising successes. This session will dive into lively case studies and dissect the game-changing strategies that have supercharged donor engagement and fundraising outcomes. Discover how targeted research and savvy data analytics can transform your fundraising efforts.

Education Track(s): Current and Prospective Donor Research

Audience: Applied

Cannon Brooke

Brooke Solutions - Founder

Jennifer Oyer, CFRE, MA, AFP Certified Facilitator (formerly AFP Master Trainer), FCEP

Community Impact Advisors - Founder & Chief Joy Officer

Tue, Apr 29, 2025

8:00am - 9:15am

Room 331-332

### **Fundraising and the Nonprofit Board**

Fundraising and the Nonprofit Board takes a deep dive into how board members can support fundraising efforts through both active and supporting roles. Designed to nurture partnership and collaboration between executive directors, development staff, and board leaders, this workshop will provide practical tips for empowering board members to get involved.

Education Track(s): Volunteer Involvement

Audience: Applied

Launa Wilson, MSW

Launa Wilson Consulting LLC - Chief Executive Officer

Tue, Apr 29, 2025

8:00am - 9:15am

Room 431-432

### **How to Work with DAF Donors: Strategies from the Field**

Struggling to maximize donor advised funds (DAFs)? We've got you covered! DAFs' popularity is skyrocketing, making it increasingly important that fundraisers have high DAF IQs. You can seize DAF opportunities and navigate their challenges with new information and strategies presented by this AFP Levis Research Fund award-winning team!

Education Track(s): Securing the Gift

Audience: Strategic

Genevieve Shaker, PhD

Indiana University Lilly Family School of Philanthropy - Donald A. Campbell Chair in Fundraising Leadership

Dan Heist, MA, PhD

Brigham Young University - Assistant Professor

Tue, Apr 29, 2025

8:00am - 9:15am

Room 343 - 344

### **The Truth about Foundation Fundraising**

You may be doing your foundation fundraising all wrong. Come learn how foundations really make decisions, how you can best use that to your advantage, and how to build a strong, scalable, foundation program that leads to big grants.

Education Track(s): Securing the Gift

Audience: Strategic  
Robert Osborne  
The Osborne Group, Inc. - Principal  
Laurel McCombs  
The Osborne Group - Senior Advisor

Tue, Apr 29, 2025

8:00am - 9:15am

Room 345 - 346

**Compelling & Inclusive Storytelling – How to Center Underrepresented Voices**

Don't miss this opportunity to elevate your storytelling prowess and engage diverse perspectives in your organization's fundraising efforts. Participants will learn powerful tactics and principles, including asset framing and community-centric fundraising, to amplify marginalized narratives authentically. Join the discussion about operationalizing these strategies for genuine partnership and impactful storytelling.

Education Track(s): Relationship Building

Audience: Applied

Alexis Brown

Park City Community Foundation - VP of Development

Diego Zegarra

Park City Community Foundation - VP of Equity & Impact

Tue, Apr 29, 2025

8:00am - 9:15am

Room 347 - 348

**Ready, Set, Ethical AI: Preparing Your Organization for AI in Fundraising**

Join us to explore the ethical integration of AI in fundraising, featuring discussions on biases, Anthropic's AI Safety Levels and the management of AI persuasion. Engage through live polls, demonstration of tools, and engaging discussion to enhance your AI strategy ethically and effectively. Don't miss this cutting-edge session!

Education Track(s): Ethics, Accountability and Professionalism

Audience: Strategic

Keith Greer, CFRE

University of New Mexico Foundation - Director of Development

Tue, Apr 29, 2025

8:00am - 9:15am

Room 423 - 425

**6 Things You Should Do to Get Your Board Ready for a Capital Campaign**

If you're planning a capital campaign, your board members are likely to be anxious. In this session, we'll give you simple and effective ways to get your board members ready for a campaign.

Education Track(s): Leadership and Management

Audience: Introductory/Foundational

Amy Eisenstein, ACFRE

Capital Campaign Pro - CEO

Tue, Apr 29, 2025

8:00am - 9:15am

Room 433-434

**More than AI, Where Donors & Tech Are Taking Fundraising (Presented by Bonterra)**

More than AI—Where Donors & Tech Are Taking Fundraising explores the latest tech-driven fundraising trends beyond the AI hype. From mobile giving to peer-led fundraising and conversational giving, discover how to meet donors where they are—and where they're going. Walk away with actionable strategies to future-proof your fundraising.

Education Track(s): Securing the Gift

Audience: Introductory/Foundational

Benjamin Miller

Bonterra Tech - SVP of Data Science and Analytics

Kimberly O'Donnell, CFRE, ACC

Bonterra - Chief Fundraising Officer

Tue, Apr 29, 2025

8:00am - 9:15am

Room 335 - 336

**Partnering for Impact: How to Engage Elected Officials to Advance Your Nonprofit's Mission**

What's the best way to engage your elected officials and public servants to educate them about the impact of your work? If you are navigating government funding cuts, you need to be in touch with your elected officials - at all levels of government. Discover how to build meaningful relationships with government officials—just as you would with major donors—to advocate for public funding streams. Strong, strategic relationships are essential when officials allocate resources or enact policies that impact your organization. Join us to learn best practices for developing long term friendly relationships with officials that can ultimately strengthen your nonprofit's position. Hear from a veteran U.S. congressional staffer and a seasoned consultant with over 25 years of experience guiding nonprofits through the complexities of local and state government funding. We'll discuss: Why do public officials want to hear from you? Why do they need to hear from you? Why it's important to stand out & be cheerfully aggressive How to reach out - getting the meeting. Understanding the role of gatekeepers. How do you approach the meeting if the elected official is on the other side of the aisle? How to develop a long term relationship with an elected official and stay on their radar.

Education Track(s): Ethics, Accountability and Professionalism

Audience: Applied

Gail Perry, CFRE, MBA

Gail Perry Group - Consultant, Speaker, Author and Coach

Cassie Rice

Gail Perry Group - Vice President for Client Success

Tue, Apr 29, 2025

8:00am - 9:15am

Room 427 -429

**Once Upon a Partnership: How to Build Relationships with Corporate Giants for a Fairytale Outcome**

In a kingdom filled with countless worthy causes, how can your nonprofit win the heart of a corporate giant? Discover how one organization turned its fundraising fairytale into reality by forging a powerful partnership with a \$24 billion corporation. Join us to unlock the magic of trust,

relationship-building, and mission alignment to find your own corporate champion and create partnerships that make dreams come true.

Education Track(s): Relationship Building

Audience: Applied

Ellen Miller

CareSource

Crystal Allen

Boys & Girls Club of Dayton - President & CEO

Michelle Cramer, CFRE, AFP Certified Facilitator (formerly AFP Master Trainer)

Cramer & Associates - President & CEO

Tue, Apr 29, 2025

8:00am - 9:15am

Room 333-334

**Ethics Matter: More Than Your Momma Taught You (CANCELLED)**

"Do the right thing at the right time". But the ethics pool can become murky in these underfunded and understaffed times. These 6 principles, based on Harvard Business School ethics research, will help you stay on the highest ethics course regardless of the challenges.

Education Track(s): Ethics, Accountability and Professionalism

Audience: Strategic

Alexis India Alm, CFRE, AFP Certified Facilitator (formerly AFP Master Trainer), CAP, CEC

Alexis Alm Advisors, LLC - CEO and Executive Coach

Tue, Apr 29, 2025

8:00am - 9:15am

Room 327-329

**Embracing the Collaborative Giving Revolution**

Today's major donor is a strategic, social investor moved by impact and connection. To succeed, you must focus on "partnership" over making a "pitch." In this presentation, hear from a researcher, major donor and practitioner about how we can transform to meet today's collaboration-minded givers and create a better experience.

Education Track(s): Relationship Building

Audience: Applied

Lisa Greer, MBA, Not Applicable

Lisa Greer - founder

Theresa Edy Kiene

Girl Scouts of Greater Los Angeles - CEO

Tue, Apr 29, 2025

9:50am - 10:10am

Tech Zone

**Transforming data into meaningful insights for non-profit impact with Intuit Enterprise Suite (Tech Zone) Presented by Intuit**

Learn how Intuit Enterprise Suite can help your nonprofit stay financially compliant, manage cash flow, and get access to real-time insights to drive your mission forward.

Education Track(s): Leadership and Management

Juliana Sublewski

Intuit - Group Product Manager

Tue, Apr 29, 2025

10:00am - 10:30am

Learning Lab 2

**AI Agents and Automation for Fundraising (Learning Lab) Presented by Microsoft**

In today's world, fundraising innovation isn't simply a nice-to-have...it's a necessity. Join Microsoft Tech for Social Impact for a Learning Lab that takes a deep dive into the world of AI agents and how they can help fundraisers automate operational processes (so you can spend more time on what matters most – your donor community and your mission). Join us to discover how Copilot agents can revolutionize your nonprofit's fundraising approach, driving greater efficiency and success. Don't miss this opportunity to learn from industry experts and take your fundraising efforts to the next level!

Apurva Chandra, MBA

Microsoft - Director, Modern Work Industry Advisor

Tue, Apr 29, 2025

10:00am - 11:15am

Room 423 - 425

**500 nonprofits have spoken! Hot Takes from The 2025 Nonprofit Marketing Survey (Presented by Feathr)**

Feathr polled nearly 500 nonprofit professionals about their biggest wins, losses, challenges, and strategies over the past year - and we're sharing their lessons with you. In this session, get real-world examples of how to... Diversify your... everything! Keep the donors you have. Navigate uncertainty with confidence.

Education Track(s): Current and Prospective Donor Research

Audience: Applied

Kimberly Bottom

Feathr - Director of Community Engagement

Tue, Apr 29, 2025

10:15am - 11:30am

Room 320-322

**Supercharge Your Bequest Program With Smart Supporter Surveys**

Understanding your supporters is important. Influencing them is vital. This practical session will equip you to run a powerful, influential survey to identify and convert bequest prospects. Drawing on world leading research, behavioural economics experiments, philanthropic psychology and dialogue marketing you will master global best practice supporter surveys.

Education Track(s): Securing the Gift

Audience: Applied

Martin Paul

More Strategic - Director

Tue, Apr 29, 2025

10:15am - 11:30am

Room 323-325

**From Data Analysis to Action: Utilizing AI for Nonprofit Success**

Explore how AI can transform nonprofit communication strategies. This interactive session includes a live ChatGPT demo, teaching you to utilize AI for effective donor segmentation, message optimization, and increased engagement, ultimately boosting your nonprofit's impact.

Education Track(s): Securing the Gift

Audience: Applied

Josh Hirsch, MS

Fundraise Up - Education and Training Strategist

Tue, Apr 29, 2025

10:15am - 11:30am

Room 327-329

### **Two Studies on the State of African American Philanthropy**

Uncover the essence of African American philanthropy with Elsie L. Scott, Ph.D. and Dr. Emmett D. Carson. From boosting HBCU support to advocating for collective giving, delve into vital research and actionable strategies for societal equity. Join the dialogue shaping a more inclusive future through philanthropy.

Education Track(s): Current and Prospective Donor Research

Audience: Strategic

Emmett D. Carson, PhD

Valdry Center for Philanthropy at Southern University - Former CEO, Silicon Valley Community Foundation and Minneapolis Foundation

Elsie L. Scott, MA, PhD

Howard University - Director, Ronald W. Walters Leadership & Public Policy Center

Alfred Harrell, III, CFRE, MBA

Southern University System Foundation - CEO

Tue, Apr 29, 2025

10:15am - 11:30am

Room 331-332

### **AI & Major Gifts: The Fundraiser's Roadmap to Smarter Donor Engagement (Presented by DonorSearch)**

AI is revolutionizing major gift fundraising, moving beyond wealth screening to predictive intelligence. This session explores how AI uncovers high-potential donors, forecasts major gifts, and personalizes outreach. Learn how to optimize engagement, maintain a dynamic portfolio, and convert prospects into committed donors using cutting-edge AI strategies.

Education Track(s): Current and Prospective Donor Research

Audience: Strategic

Sarah Tedesco, MBA

DonorSearch - Chief Operating Officer and Co-Owner of DonorSearch

Tue, Apr 29, 2025

10:15am - 11:30am

Room 333-334

### **Pursuing State and Federal Funding Through Legislative Advocacy and Relationship Building: A Case Study**

Learn how to engage with public officials to secure transformational funding for your organization. Join us to gain an understanding of how to educate government entities about your organization's impact, your value to your constituents and the community, and how you can serve as a resource to civic leaders.

Education Track(s): Ethics, Accountability and Professionalism

Audience: Introductory/Foundational

Becky Watts

G2G Consulting - Vice President

Julie Weagraff, CFRE

Girl Scouts of North East Ohio - Chief Development Officer

Tue, Apr 29, 2025

10:15am - 11:30am

Room 431-432

**Oops, I'm the CEO! How Fundraising Prepared Me to be an Ethical and Responsive Leader**

Ever unexpectedly find yourself in a financial or executive leadership role? This session will explore how competencies developed in fundraising - like transparency, strategic thinking, team empowerment, relationship building, and resilience - can inform & strengthen your work at an executive level, whether you planned to be there or not.

Education Track(s): Leadership and Management

Audience: Applied

Kirk Laughlin

Refugee Women's Alliance - Chief Development Officer

Tue, Apr 29, 2025

10:15am - 11:30am

Room 343 - 344

**How to Save Giving in 10 Easy Steps: A Blueprint for Philanthropic Transformation**

Join philanthropic visionary Lisa Greer in a dynamic talk-show style session at AFP ICON hosted by Kassie Cosgrove. Discover practical strategies to revolutionize charitable giving, as Lisa shares insights, success stories, and interactive discussions. Don't miss this opportunity to transform your approach to philanthropy and make a lasting impact."

Education Track(s): Leadership and Management

Audience: Strategic

Kassie Cosgrove, CFRE, MA

Loyola University New Orleans - Senior Development Officer

Lisa Greer, MBA, Not Applicable

Lisa Greer - founder

Tue, Apr 29, 2025

10:15am - 11:30am

Room 345 - 346

**Presidents, Politics and Personalities: How to Engage Your Leadership in Fundraising - Whoever They Are**

Development leaders who represented the legacies of Presidents Ronald Reagan and Bill Clinton will talk "Across the Aisle" to share their experience working with diverse leaders, boards, and philanthropic causes to maximize fundraising outcomes. They will discuss "founders syndrome," board politics and dynamics, and working with/beyond an organization's founder.

Education Track(s): Leadership and Management

Audience: Strategic

Michelle Keegan

Krach Institute for Tech Diplomacy at Purdue - Chief Revenue Officer

Jethro Miller

Jethro Miller & Associates LLC - CEO

Tue, Apr 29, 2025

10:15am - 11:30am

Room 347 - 348

**Empathetic Conversations: Helpful Flairs for Drama**

Do you wish your boss understood you? Or you had more time for your team? Or there's an elusive donor you just can't read? You need empathetic conversations. But how?! Together, we'll make the intangible tangible with a six-step process so you can begin your journey in the Empathy Army.

Education Track(s): Leadership and Management

Audience: Applied

Matthew Gellin, CFRE, MFA

American Legacy Theatre - Executive Artistic Director & CEO

Tue, Apr 29, 2025

10:15am - 11:30am

Room 427 -429

**Creating a Culture of Commitment Within Your Development Team**

This session addresses the critical challenge of attracting, developing, and retaining top fundraising talent in the nonprofit sector. You'll gain insights and strategies for creating a supportive and engaging work culture that fosters long-term commitment and reduces turnover among fundraising professionals. This could be the best fundraising job ever!

Education Track(s): Leadership and Management

Audience: Strategic

Tammy Zonker, AFP Certified Facilitator (formerly AFP Master Trainer), CFRM

Fundraising Transformed - Fundraising Strategist, AFP Master Trainer & Keynote Speaker

Tue, Apr 29, 2025

10:15am - 11:30am

Signature Room

**It's Time to Pay Attention to Gen X and Millennials**

Soon, \$53 trillion will be passed from Baby Boomers to Gen X and Millennials. How can non-profits begin preparing today for these younger generations of donors? In this insightful panel, learn from Gen X and Millennial philanthropy leaders how they are setting up their fundraising programs for success.

Education Track(s): Relationship Building

Audience: Strategic

Tom Diascro

Hopkins School - Chief Advancement Officer

Beth Hatcher

Beth Interactive Inc. - Principal + CEO

Dzenan Berberovic, CFRE, MA

Avera Health - Chief Philanthropy Officer

Christi-Marie Butler

USA Triathlon Foundation - Chief Development Officer

Tue, Apr 29, 2025

10:15am - 11:30am

Room 433-434

**AI - the Fundraising Assistant We've All Been Waiting For (Presented by Blackbaud)**

Discover how AI technology can revolutionize the fundraising profession. Explore how a human-AI partnership can be used to focus on relationship building with your donor base by redistributing the work of fundraising to a shared workforce made up of humans and AI. From helping us better understand donor behavior, personalize communications, or predict giving patterns, AI is the assistant we all desperately wish we could have as fundraisers. We'll also discuss the ethical considerations of AI adoption and highlight how fundraisers' unique relationship-building skills make them ideal for responsible AI use. Learn from real-life success stories and ideate together to gain practical tips for integrating AI into your fundraising efforts. Don't miss this opportunity to enhance your fundraising strategies with AI!

Education Track(s): Ethics, Accountability and Professionalism

Audience: Applied

Holly Elizabeth Herbert

Blackbaud - Director of Data Intelligence

Tue, Apr 29, 2025

10:15am - 11:30am

Room 420 - 422

**Managing the Avalanche: Prospect Research & Assignment for 2,000+ Prospects**

A challenge for many development offices is conducting research on and making relationship management assignments when there are a surplus of prospects. In this session, we present a suite of processes for addressing this challenge can be adapted and replicated at other organizations.

Education Track(s): Current and Prospective Donor Research

Audience: Strategic

Jon Kingzette, PhD

Campbell & Company - Senior Consultant

Cara Josephson

NewYork-Presbyterian Hospital - Research Manager

Tue, Apr 29, 2025

10:15am - 11:30am

Room 335 - 336

**AI in Action: What Nonprofits Can Steal from Google & the For-Profit Frontier (Presented by Delve Deeper)**

Discover how Google and other leading for-profit brands are using AI to drive smarter growth—and what nonprofits can learn from their playbooks. This session offers actionable strategies to balance short-term RoAS with long-term engagement, including how to reach Gen Z and optimize media spend for sustainable fundraising success.

Education Track(s): Securing the Gift

Audience: Introductory/Foundational

Clive D'souza

Google Cloud - Head of Partner Engineering

Anton Lipkanou  
Delve Deeper - President and Partner  
David LaCombe

Tue, Apr 29, 2025  
10:45am - 11:15am  
Learning Lab 2

**Delve Deeper and Greater Good Charities: Building Audience-First Strategies from Insight to Impact (Learning Lab) Presented by Delve Deeper**

Discover how Greater Good Charities puts audience insights at the heart of its strategy to drive deeper engagement and long-term donor value. This session will explore practical tactics for building trust, tailoring messaging, and optimizing campaigns through an audience-first lens—proven to boost both impact and retention.

Wade Edwards  
Katherine Healy

Tue, Apr 29, 2025  
11:30am - 12:00pm  
Learning Lab 2

**Empowering your nonprofit's mission with Intuit Enterprise Suite (Learning Lab) Presented by Intuit**

Learn how your nonprofit can benefit from an AI-powered suite that's designed to seamlessly increase productivity.

Education Track(s): Leadership and Management , Health Care (Sponsored by DonorSearch, Curated by Advancement Resources)

Nicholas Wong  
Intuit - Sales Engineer