



All Education Sessions – Updated April 11, 2023  
*Subject to Change*

We have a wide array of educational sessions waiting for you at AFP ICON 2023. Whether you want to master leadership, relationship building, securing the gift, trends and innovation, or all of the above, AFP has the latest and greatest information to unlock your fundraising potential. More Sessions to Come.

\*Sessions and speakers subject to change. \*Session times, dates and assigned rooms subject to change.

#### Education Tracks:

- Current & Prospective Donor Research (Sponsored by iWave)
- Ethics, Accountability & Professionalism (Sponsored by Brakeley Briscoe)
- Leadership & Management (Sponsored by Lindauer Global)
- Relationship Building
- Securing the Gift Track
- Volunteer Involvement

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Sun, Apr 16, 2023

9:00am - 10:15am

No Need for Drano- Learn How to Unclog Your Donor Pipeline Today

Learn how to identify pipeline clogs and the steps to fix them so you smoothly move donors from annual fund to mid-level to major gifts to transformational investments. Participants learn the data they need to identify the clogs and the actions to take to upgrade donors at each level.

Education Track: Securing the Gift

Audience: Applied

#### Speakers

Destiney Patton, CFRE, MM

Second Harvest Food Bank of Middle Tennessee - Manager, Donor Relationships

Destiney Patton, CFRE, is the Manager, Donor Relationships for Second Harvest Food Bank of Middle Tennessee. She oversees their robust mid-level giving program and develops the strategy for the Individual Giving Team to maintain a thriving pipeline at each level. In addition to her work at Second Harvest, Destiney leads all fundraising for Girls on the Run of Middle Tennessee as Board Chair and serves as Board President for the AFP Nashville chapter.

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Sun, Apr 16, 2023

9:00am - 10:15am

We Are All Not Ok – Building Cultures that Support, Heal and Strengthen

The last three years have thrust forward the professional struggles for many, especially women and people of color. Creating cultures that tackle these challenges is hard, intentional work. In this session, we will share strategies and tangible action that supports, heals, and strengthens our workplace, building better cultures for all.

Education Track: Leadership and Management

Audience: Strategic

#### Speakers

Natalie Gupton, CFRE, MPA

AgSafe - Vice President and Chief Operating Officer

Natalie is an experienced fundraiser, event planner, grant writer and instructor. In 2017, she found the perfect blend of her personal and professional passions as AgSafe's Vice President and Chief Operating Officer. Previously, she was a

development coordinator for NortonChildren's Hospital and the United Way of the Bluegrass. Natalie and her husband enjoy their small piece of country life on 2 acres in the heart of Kentucky's largest city with their daughters.

Amy Wolfe, CFRE, MPPA

Mujeres Poderosas - Partner

Amy Wolfe, MPPA, CFRE, is a partner in Mujeres Poderosas, a collaboration of hard-working, determined and passionate women sharing their collective wisdom for the betterment of non-profit organizations. She has nearly twenty years of non-profit development experience. Amy serves on the boards of directors for Ag Innovations, the Modesto Rotary Club, and the League of Women Voters of Stanislaus County. She, her husband, and their daughter enjoy country life in California.

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Sun, Apr 16, 2023

9:00am - 10:15am

Fundraising Alchemy: The Science and Art of Integrated Campaigns

Is direct mail dead? Can digital alone sustain your program? Can't the two just carry on in their respective corners? Nope, no way, and definitely not! Join direct response and digital innovation nerds Holly and Brock for an engaging session on the science and the art of integrated fundraising campaigns.

Education Track: Securing the Gift

Audience: Introductory/Foundational

Speakers

Brock Warner, CFRE

Broccoli - Partner

Brock Warner, CFRE is a recognized leader in the nonprofit sector and author of the bestselling *From The Ground Up: Digital Fundraising for Nonprofits*. He has raised millions of dollars, and developed successful campaigns, partnerships, and sector innovations, and co-founded Broccoli in 2021. Brock is a sought-after presenter throughout North America, and is the professor of Integrated Marketing for Nonprofits at Humber College Business School's Fundraising Management postgraduate program in Toronto.

Holly Paulin, CFRE

Broccoli - Partner

Holly H. Paulin, CFRE has been a professional fundraiser for 20+ years. She's equally passionate about emotional storytelling and good data analytics, and strongly believes that the best fundraising happens at their intersection. After working as both a front-line fundraiser and a consultant, Holly co-founded Broccoli in 2021. She is a graduate of Humber's Fundraising program, holds a B.Sc. from Mount Allison University, and served as Co-Chair of AFP Ottawa's 2021 Fundraising Day conference.

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Sun, Apr 16, 2023

9:00am - 10:15am

Staff Complacency: The Leadership Blindspot that Demands Attention

Breaking down silos..the other way. It's time for leadership to understand the horizontal slabs that exist within an organization which result in complacency, lower productivity, and growing frustration from staff. Isolating those outside of the senior management team in a market with already high turnover comes at a significant cost.

Education Track: Leadership and Management

Audience: Strategic

Speakers

Alexis Gaiptman, CFRE, MBA

Make-A-Wish® Canada - Regional Vice President

Alexis is a Regional Vice President at Make-A-Wish® Canada and has over 18 years experience. Specializing in both legacy and major gifts, strategic planning and operational growth, she has a proven track record in the healthcare, higher education and humanitarian sectors. A lifelong learner, she seeks out positive change and the desire to better our

communities. Alexis is the President Elect of the AFP Quebec Board and has recently completed her Executive MBA with McGill-HEC.

Karine Mayers

Leukemia and Lymphoma Society of Canada - Regional Director, Quebec

Karine Mayers is Regional Director (Quebec) at Leukemia and Lymphoma Society of Canada and has over 12 years of fundraising experience varying from corporate sponsorship, to special events, campaign, major gifts and annual fund. She has worked in healthcare, higher education, and the arts. With a career path that includes human resources before being recruited into the non-for-profit world, she is passionate about making connections, building relationships and creating a positive, supportive work environment.

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Sun, Apr 16, 2023

9:00am - 10:15am

Managing Up: Turning Your CEO into a Fundraising Rock Star

Empower your apprehensive CEO to become comfortable fundraising. While raising philanthropic dollars is the ultimate goal, in the end we all know it's about relationships. Learn how to coach your CEO to turn these relationships into increased funds. It is easier than you think!

Education Track: Relationship Building

Audience: Applied

Speakers

Roselle Ungar, CFRE

Jewish Family Service of Greater New Orleans - Executive Director

Roselle M. Ungar, CFRE is the Executive Director of Jewish Family Service of Greater New Orleans (JFS). Before joining JFS, Roselle served as the Director of Community and Philanthropic Affairs for Crescent Bank. She managed existing and new initiatives. Roselle also owns Strategic Nonprofit Consulting. Roselle, a past president of the New Orleans Chapter, is a graduate of AFP's Faculty Training Academy and recipient of the New Orleans Chapter of AFP Outstanding Fundraising Professional Award.

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Sun, Apr 16, 2023

9:00am - 10:15am

The Multicultural Majority: Who They Are and How They Are Changing Fundraising

By 2050, ethnic minorities will become the majority – a shift already registered in the segment between 1-18 years old. As this racial diversification occurs, new philanthropy behaviors emerge. Come hear the latest data and tested strategies that will help you deliver appeals that resonates with multicultural donors.

Education Track: Current and Prospective Donor Research

Audience: Strategic

Speakers

Ivan Leon, MA

Kerux Group - Kerux Group

Ivan Leon is an accomplished cross-cultural marketing strategist. He leads Kerux Group, a multicultural communications agency that helps nonprofits engage Hispanics with authenticity. He has provided advice and direction to organizations such as Prison Fellowship, CBN, FamilyLife, In Touch, and Renewal Ministries, among others. He also speaks regularly on the topic of audience and donor diversity.

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Sun, Apr 16, 2023

9:00am - 10:15am

Creating a High-Performance Environment for Major Gifts

In this session, we will learn how emerging fundraising trends are impacting major gifts—and how to handle it. We will discuss recruiting and maintaining a high-performing major gifts team and how to practice strategies that will increase major gifts ROI and will promote inclusion and diversity.

Education Track: Securing the Gift

Audience: Applied

Speakers

Cassie Carter, PhD

Campbell & Company - Vice President, West Region Director

Cassie Carter brings 30 years of experience to her work where she builds a shared understanding how organizational strengths can be leveraged to achieve fundraising success. Cassie was Associate Vice President for Development at Hawaii Pacific University and Cal Poly, San Luis Obispo, and Executive Director of Montana Outdoor Science School. She is chair of Pierce College Foundation and holds a doctoral degree in Teaching and Learning from University of Southern California.

Dan Nevez, PhD

Campbell & Company - Vice President, Executive Search

With 30 years of professional experience including retained executive search, Dan has successfully placed over 170 senior executives at regional and national nonprofits and associations. Prior to his work at Campbell & Company, Dan served as principal at a premier national executive search firm and was a museum curator and socio-economic historian. He received his master's degree and completed his doctoral studies at the University of Chicago.

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Sun, Apr 16, 2023

9:00am - 10:15am

Facets of Advancement Services: Avoiding Silos in the Pursuit of Institutional Advancement

What are the key functions of advancement services? How do you use this knowledge to work closely with your colleagues and fundraising counterparts? How does this work in the stewardship and cultivation of constituents? This session highlights how advancement services can be used to avoid silos in fundraising.

Education Track: Relationship Building

Audience: Introductory/Foundational

Speakers

Pamela Mitchell, MBA

Alcorn State University - Manager of Advancement Services

Pamela Mitchell is an Advancement Services professional with almost 17 years of experience in higher education. Her roles in academic and student affairs play a vital part in the success of her role in fundraising, particularly in data integrity and reporting. She received her undergraduate and graduate degrees from MS Valley State University.

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Sun, Apr 16, 2023

9:00am - 10:15am

Fundraising Possibilities the Pandemic Taught Us

In 2021, the Greater New Orleans Foundation, with the University of New Orleans Department of Political Science, released The State of Nonprofits in Southeast Louisiana 2021 - Adaptability And Racial Equity in Year One of the COVID-19 Pandemic. Report findings demonstrated a regional gap in nonprofit racial leadership and identified a variety of challenges nonprofit leaders of color encountered as fundraisers for their organizations. The Foundation committed to closing that gap through grantmaking, focused programming, and strategic collaborations. During the same period, the AFP Greater New Orleans Chapter continued their efforts to center inclusion, diversity, equity, and access (IDEA) by hosting several equity-focused programs. Though the Chapter experienced significant financial loss, they committed to offer free programming during the pandemic. As nonprofits in southeastern Louisiana grappled with the long-term impact of the pandemic on fundraising possibilities, the two organizations created a unique partnership to advance IDEA in the fundraising, nonprofit, and philanthropic sectors.

Education Track: Relationship Building

Audience: Strategic

Speakers

Devon Turner, MA

Greater New Orleans Foundation - Director of Nonprofit Leadership and Effectiveness

A native of Plaquemines Parish in southeastern Louisiana, Devon R. Turner joined the Greater New Orleans Foundation as Director of Nonprofit Leadership and Effectiveness in July 2022. As Director, Devon manages a spectrum of nonprofit capacity-building programs, leadership and skill development offerings, and special projects at the Foundation. Through thought partnership and program designs informed by a commitment to justice, equity, diversity, and inclusion, she responds to the unique challenges and opportunities nonprofits in the

Kellie Chavez Greene, MFA

Greater New Orleans Foundation - Vice President for Programs

Kellie Chavez Greene is Vice President for Programs at the Greater New Orleans Foundation. Kellie's leadership has been instrumental to the Foundation's positioning as an innovator and civic leader in the pursuit of driving positive impact through philanthropy, leadership, and action in the New Orleans Region. This work includes grantmaking and civic leadership initiatives including Nonprofit Leadership and Effectiveness, New Orleans Works, the Foundation's Workforce initiative, Environmental programs, Fund for Racial Equity, and Disaster Recovery.

Chantelle Pierre, MSW

Chantelle Pierre Consulting

Chantelle Pierre brings over 25 years of experience in education and nonprofit leadership to strengthen communities. She is the founder of Chantelle Pierre Consulting, which offers fundraising and leadership development services that promote racial equity within organizations. A go-to strategist for organizations experiencing leadership transitions, she has led teams to produce goal-shattering results. She has raised seven-figure, multi-year gifts used to resource historically excluded, Black-led grassroots organizations and educational institutions serving vulnerable populations.

Natasha Walker, MPA, CAP®

Greater New Orleans Foundation - Development Officer

Natasha Walker joined the Greater New Orleans Foundation in August 2019 as Development Officer. She has held various fundraising roles throughout her career at the Ellis Marsalis Center for Music, the National Center for Civil and Human Rights, and the City of Atlanta's Mayor's Office. She serves on the board of AFP, Greater New Orleans Chapter. Natasha holds BA degrees in English and History from North Carolina Wesleyan University and an MPA from The Pennsylvania

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Sun, Apr 16, 2023

9:00am - 10:15am

The Future of Fundraising: Why Philanthropy is in Trouble— and How to Save It

Every single day, potential donors are turned off by arcane or off-putting fundraising methods. In this talk, Lisa Greer sounds the alarm— and discusses the applicable fundraising solutions that will save your nonprofit.

Education Track: Relationship Building

Audience: Strategic

Speakers

Lisa Greer, MBA

Saving Giving - Author, Philanthropist, Coach, Advisor

Lisa Greer is a fundraising coach, nonprofit changemaker, major donor, and author of the bestselling book "Philanthropy Revolution". Lisa is on a mission to "Save Giving". With her help and direction, the nonprofit world will see its donors engaged and energized, their organizations sustainable and with increased impact, and a more honest philanthropic culture that will create a larger and more loyal donor pool.

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Sun, Apr 16, 2023

9:00am - 10:15am

Because Fundraising Isn't Challenging Enough – Spanning Recent Global Changes in the Law Impacting Philanthropy

Seriously? A session on legal stuff? Hey - This is the session not to be missed. Not just informative but entertaining too.

Our donors live in a world where changes in the law impact their capacity to support our causes and organizations. You'll walk away with insights and creative strategies. Eligible for 1.25 ACFRE credits in Leadership or Management

Education Track: Leadership and Management

Audience: Strategic

## Speakers

Ted Sudol, JD

CARTER - Managing Director

Ted Sudol has regularly addressed AFP ICON attendees with updates on the law's impact on philanthropy and fundraising. In a career spanning five decades, he's been a consultant, practitioner, lawyer, and executive within the voluntary, public and private sectors. As Managing Director at CARTER, Ted offers an unparalleled perspective on the challenges and opportunities facing the voluntary sector today. Ted is a graduate of Georgetown and Temple Law School.

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Sun, Apr 16, 2023

9:00am - 10:15am

Insights From the 2023 Digital Outlook Report – (Presented by Fundraise Up)

The long-awaited "2023 Digital Outlook Report" is here, and it uncovers nonprofit trends in online fundraising and marketing. Join us in this session to get a first look at exclusive data from this year's report to learn what key new trends organizations are grappling with and how organizations are taking limited budgets and human resources to be successful.

## Speakers

Salvatore Salpietro

Fundraise Up - Chief Partnerships Officer

Salvatore Salpietro is Chief Partnerships Officer of Fundraise Up, a technology company unlocking the world's generosity potential by optimizing how people give. He leads nonprofits from understanding the platform through to installation and integration planning. Previously, he served as digital director of the Child Mind Institute as well as a co-founder of the ISEBOX content platform. With a background in both technology and nonprofits, he understands the needs of both and bridges the gap.

Michael Johnston

Hewitt and Johnston Consultants Inc. - President and Co-Founder, hjc

Michael Johnston is the President and founder of the global fundraising consultancy, Hewitt and Johnston Consultants. He has helped raised over a billion dollars for his clients around the world. He has been a fundraiser for 28 years, and has worked with 100's of nonprofit organizations in Canada, the U.S., Europe, Latin America, and Asia Pacific. Mike is an expert in fundraising innovation and integration. He is the author of two books: *The Fund Raiser's Guide to the Internet* (nominated for the 1999 Stanley Robson St. Lawrence Award for Research in Philanthropy) and *The Nonprofit Guide to the Internet*.

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Sun, Apr 16, 2023

9:00am - 10:15am

Mid-Level, Sustainer, and Sophisticated Direct Response: How to Adapt to Shifting Donor Expectations (Sponsored by GiveSmart by Community Brands)

For years, consumer and philanthropic trends were considered unique and distinct. This idea limited curiosity around their points of intersection. This session will look at shifts in consumer and donor behaviors. Participants will leave a deeper understanding of practical ways to leverage and expand their audience to increase revenue.

Education Track: Securing the Gift

Audience: Strategic

## Speakers

Krista Asteriadis Byers

With nearly three decades serving in the non-profit sector, Krista is passionate about improving lives on a global scale through data driven, actionable, direct marketing strategy designed to grow revenue for mission-focused organizations. She has proven the value of delivering exceptional donor centered experiences through integrated omni-channel campaigns while building a pipeline for peer to peer, monthly, mid-level, planned giving and major donor programs.

Jennifer Bielat

Pursuant - Executive Vice President, Client Strategy

Jennifer Bielat serves as Executive Vice President, Client Strategy. With more than two decades of experience in the nonprofit sector, Jennifer brings intimate knowledge and understanding of nonprofit management. In her role, she develops strategic solutions to help organizations navigate the opportunities and challenges facing today's nonprofit organizations. Jennifer's expertise lies in integrated marketing and communications strategy, comprehensive direct response strategy and execution, digital marketing and fundraising, and nonprofit leadership.

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Sun, Apr 16, 2023

9:00am - 10:15am

Trends to Diversify Revenue Streams and Raise More Amid Economic Upheaval (Presented by GiveSmart by Community Brands)

Diversifying your fundraising strategy with various revenue streams is crucial to your organization's sustainability. Most recently, inflation and economic uncertainty present threats to nonprofits' financial health. How are you protecting your nonprofit from economic upheaval? This session is packed full of industry fundraising trends and real-life ideas on how to diversify your revenue streams to raise more.

Education Track: Leadership and Management

Audience: Applied

#### Speakers

Cara Dickerson

Cara Dickerson is the Vice President of Customer Success at GiveSmart by Community Brands where she oversees a team dedicated to assisting thousands of organizations utilize fundraising and donor management technology platforms to exceed their financial goals and fund their missions. With close to 16 years in the non-profit space, her passion for this industry runs deep. While she loves to travel anywhere and everywhere with her husband, Cara is proud to call Chicago, IL

Kirsten Primozic

GiveSmart by Community Brands - Product Operations Manager

As a Product Operations Manager, I love to dive into the data and analytics to find the story that it tells. The data does not lie, nor hold any biases, so approaching any project with a clear and defined purpose will allow it to paint the picture which is needed to find the resolution. There is nothing more profound than being able to glean information from a pile of endless spreadsheets.

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Sun, Apr 16, 2023

9:00am - 10:15am

Shifting the Donor Landscape Paradigm: Strategies to Increase Engagement and Philanthropy among Donors of Color (Sponsored by Fundraising Academy)

This two-part session will allow participants to assess their organization's diverse constituency landscape and establish a diversity, equity, and inclusion (DEI) action plan to embed into their current fundraising initiatives. In the first half of the session, participants will work in small groups to assess their organization's DEI goals, shortfalls, and opportunities. The second half of the session is designed to introduce DEI strategies that align with their fundraising plans and priorities. Participants will leave with a tangible action plan they can use to improve their individual donor engagement and the operations within their organization.

Education Track: Relationship Building

Audience: Strategic

#### Speakers

Alyssia Coates, MA, PhD

Brown University - Senior Director of Development, Inclusive Philanthropic Engagement

Dr. Coates joined Brown University in 2019, and serves as a major gift fundraiser and the academic liaison for the Centers for the Study of Race and Ethnicity in America, and the Study of Slavery and Justice, as well as the Office of Institutional Equity and Diversity at Brown University. She is an active member of Fabulous Female Fundraisers, Women of Color in Fundraising and Philanthropy, the Council for Advancement and Support of Education (CASE),

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Sun, Apr 16, 2023

9:00am - 10:15am

### Amplifying Impact Through Workplace Giving (Presented by Blackbaud)

Workplace giving can be a way to introduce giving and volunteering to potential donors and volunteers. To the uninitiated, they can look like anonymous donors. But like DAF donors, employees who give and volunteer through the workplace are intentional in their giving. For nonprofits they represent people who are interested in the cause, have already decided to give of time or treasure, and therefore represent a strong candidate to develop into a more significant donor. This session will be a panel discussion with a Corporate Social Responsibility executive, a board member from The Blackbaud Giving Fund, and an experienced fundraising executive. This group will discuss how these programs work from the offering to the employee, to funding grants through the DAF, to stewardship and fundraising activities at the nonprofit.

Education Track: Relationship Building

Audience: Strategic

#### Speakers

Calli Hartman

Calli Hartman is the Head of Customer Success for Blackbaud's Corporate Impact division, with more than 10 years of experience in customer success and professional services leadership. She currently leads the team that helps Blackbaud customers maximize the impact of their employee engagement, CSR, and ESG programs through YourCause and EVERFI solutions. A results-driven professional with a background in community organizing and tech, Calli Hartman excels at unifying diverse stakeholders to deliver impact.

Liz Marenakos

Blackbaud - Product Marketing Director

Liz currently serves as Director of Product Marketing and Value Enablement at Blackbaud and has 20 years of experience in developing and launching successful products for the nonprofit sector. Passionate about building capability that enables nonprofit success, Liz has worked closely with hundreds of organizations that manage endowed funds, scholarships, or offer donor-advised funds. She brings a deep operational understanding of the management of DAFs, endowments, and other restricted funds.

Tycely Williams, CFRE, Executive Master's, Certificate in Philanthropic Psychology

Bipartisan Policy Center - Chief Development Officer

Over the past twenty-five years, Tycely has inspired investments of more than \$150 million dollars for social good. She currently serves as Chief Development Officer for The Bipartisan Policy Center. Additionally, she leads the AFP global Inclusion, Diversity, Equity, and Access Committee; chairs the governing boards of three organizations, and teaches Fundraising and Leadership at The Pennsylvania State University. Tycely is a Certified Fundraising Executive and holds an Executive Master's in Leadership from Georgetown University.

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Sun, Apr 16, 2023

10:15am - 11:30am

### Six Key Factors for Optimizing Healthcare Philanthropy

This presentation explores six facets of a healthy referral-based medical philanthropy program, with real-world examples from organizational leaders who have driven a process of culture change at their organizations. Examine your own opportunities to elevate the service you provide to your community in this dynamic session.

Education Track: Leadership and Management

Audience: Strategic

#### Speakers

Jared Langkilde, MBA

Honor Health Foundation - President and CEO

Jared Langkilde is a passionate and effective advocate for the role of philanthropy in transforming healthcare. He joined HonorHealth Foundation as president and CEO in 2018, leading the organization with a clear focus on its mission for

finding cures, saving lives and transforming healthcare. Under his leadership, HonorHealth Foundation has consistently increased its annual philanthropic support for HonorHealth, a six-hospital system serving the metro Phoenix region.

Mark McCampbell

Advancement Resources - Senior Vice President

With over 4 decades of experience in a wide range of development leadership positions, Mark has worked with leaders in healthcare, higher education, arts, human services, and faith-based institutions to help organizations prepare and take steps towards the next level of growth. He is active in various fundraising professional organizations, community nonprofits, and boards.

Anamaria Repetti

UT Health San Antonio - Vice President for Development and CDO

Anamaria Repetti is Vice President and Chief Development Officer at UT Health San Antonio. Anamaria has more than 25 years of experience in healthcare and higher education fundraising, most recently serving as the Managing Senior Executive Director of Development at UC San Diego, where she developed and implemented a national fundraising program in support of UCSD's recently completed \$3 Billion Campaign for UC San Diego, including recruiting and managing a 50-member national campaign cabinet.

Caleb Dutzer

Advancement Resources - Director, Business Development

Caleb works closely with academic, healthcare, and nonprofit organizations to develop and execute a customized and strategic approach to deepen the culture of philanthropy within each organization while supporting long-term transformation. In addition, Caleb is part of the facilitation team that delivers professional education for healthcare, academic, and nonprofit organizations. Through these engagements, he is involved in many client-focused projects and is honored to serve these organizations in a variety of ways.

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Sun, Apr 16, 2023

10:45am - 12:00pm

Uncomfortable Conversations

As fundraisers, we are often faced with delicate situations -- whether they be with donors, Board members, colleagues or even supervisors. These conversations can be simply uncomfortable or touch on ethical dilemmas. In this interactive session, we will touch on many sample situations and their solutions.

Education Track: Ethics, Accountability and Professionalism

Audience: Introductory/Foundational

Speakers

Virginia Thumm

Virginia Fundraising Consultants - Virginia Fundraising Consultants

Virginia Thumm has worked in the nonprofit sector in New York and Virginia for more than 35 years, expanding the financial capacity of organizations in the arts, education, the environment, public media and social services and has been responsible for consistently leading campaigns to exceed their goals. Virginia currently serves on the Board of her local AFP chapter and is chair of the Ethics Committee, where she leads a monthly Five Minute Ethics Exercise.

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Sun, Apr 16, 2023

10:45am - 12:00pm

Fundraising Innovation: How Canadian Organizations are Leading the Way

See leading examples of fundraising innovation from north of the border to include innovative social enterprise, and social finance models, corporate partnerships, collaborative foundation models, cause marketing campaigns and more. This session will present real-world Canadian examples, explain the key principles leveraged by these organizations and highlight fundraising results/success.

Education Track: Leadership and Management

Audience: Strategic

## Speakers

Jolene Livingston

Bespoke Social Profit Solutions - Principal and Chief Vision Officer

Jolene Livingston is the founder of Bespoke Social Profit Solutions, which focuses on strategic planning, marketing and communication, and enterprise feasibility alongside fundraising. Before starting Bespoke Jolene spent a decade on the Development Leadership Team at the University of Calgary, delivering a \$100M+ annual fundraising strategy. She designed and delivered campaigns for the \$60M Schulich School of Engineering's expansion, the \$40M Taylor Family Institute for Teaching and Learning and the \$25M Werklund School of Education.

Jeni Piepgrass, CFRE

Glenbow Museum - VP, Advancement

Jeni is an experienced Fund Development professional with over 16 years of experience as a leader in the non-profit sector. Before taking on the VP, Advancement Role to lead the \$175m Glenbow Reimagined Campaign in 2021, Jeni served as the Director of Development at Glenbow. Prior to joining the Glenbow team, she was National Director of Development for Windmill Microlending, where she led an innovative philanthropy and impact investment program.

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Sun, Apr 16, 2023

10:45am - 12:00pm

The Art of Collaboration

Wondering how to elevate IDEA in your organization? Become a collaborate workplace! In this session, Lisa Stueckemann, CFRE, with 15 years of nonprofit fundraising and leadership experience provides proven ways to incorporate collaboration and integrate IDEA even if it isn't happening today.

Education Track: Leadership and Management

Audience: Applied

## Speakers

Lisa Stueckemann, CFRE, MNA

New Life Solutions - Vice President of Philanthropy

Lisa Stueckemann, MNA, CFRE, is the VP of Philanthropy at New Life Solutions on the West Coast of Florida. Her BFA in theatre from the University of Cincinnati and MNA from North Park University provide a unique and creative lens to her fundraising strategy and leadership style. Lisa is a member of AFP Tampa Bay serving in the Mentor-Protege Program and as a facilitator for their Leadership Affinity Group.

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Sun, Apr 16, 2023

10:45am - 12:00pm

A Tale of Two Campaigns...and How the One that Failed Led Us to Future Success!

Nobody is ever happy to fail...especially in their first capital campaign, but, I did. I'll share what went wrong, and how it better prepared my team to exceed our goal a few years later. You'll also get the key ingredients necessary to help YOU achieve success the first time around.

Education Track: Securing the Gift

Audience: Applied

## Speakers

Mark Chilutti, CFRE

Magee Rehab Hospital Foundation - Assistant Vice President of Development

Mark Chilutti has raised over \$30 million to improve the quality of life of individuals with disabilities during his 20+ year career at Magee Rehab Hospital in Philadelphia. His specialties are major and planned giving, and donor stewardship. He has presented frequently for many AFP chapters, at AFP ICON, AFP Spotlight Sessions, and on AFP global webinars. Mark is an Eagle Scout and a former wheelchair tennis player living with a spinal cord injury.

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Sun, Apr 16, 2023

10:45am - 12:00pm

Facing The Dementia Dilemma Together: Collaboration between Charitable Gift Planners and Financial Planners

Financial planners and charitable gift planners have a lot in common. We serve our donors and clients by adhering to national standards, codes of ethics, and a donor bill of rights. What we have yet to do though is serve our donors and clients as collaborative agents for good.

Education Track: Ethics, Accountability and Professionalism

Audience: Applied

#### Speakers

Angie O'Leary

Angie is head of Wealth Planning at RBC Wealth Management – U.S. In this role, she and her team are focused on helping clients live life with more clarity and confidence through goals-based planning delivered by skilled financial advisors. Angie is a 30-year veteran of the financial services industry.

Nancy Carlson

Nancy Carlson has written and illustrated more than 60 children's books since 1979. Here is what the Publishers Weekly review said about Nancy's book titled I LIKE ME: "The foundation of a healthy self-image, the cornerstone of a happy and successful life, is what Carlson's work is all about. In late fall 2012, Nancy heard two words from a neurologist that would rock the happy life she had created with her husband Barry McCool.

Robert Hofmann, CFRE, MA

University of Minnesota Duluth - Senior Development Officer

Robert Hofmann, MA, CFRE works at the University of Minnesota Duluth (UMD) as a Senior Development Officer. At UMD he has raised more than \$22M for student scholarships and programs. For more than eight years, Mr. Hofmann has co-led a cohort of professional fundraisers and researchers who strive to address the ethical and moral dilemma fundraisers face with an increase of dementia among faithful donors. Robert and his wife Kathleen live in Hermantown, Minnesota.

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Sun, Apr 16, 2023

10:45am - 12:00pm

An Introduction to Latinx Fundraising

The Latinx population at almost 20% of the population is largely unengaged in giving, fundraising and nonprofits. How do we reverse this historic and chronic trend at your organization? Stop walking past great donor and learn to engage them.

Education Track: Relationship Building

Audience: Strategic

#### Speakers

Armando Zumaya, 36 years

Somos El Poder - Founder

Armando Enrique Zumaya A Chief Development Officer, Director of Major Gifts, Annual Fund Officer throughout his career. He is noted as an expert on Major Gifts Prospecting, Latinx Philanthropy and Fundraising, Cold Calling for Development Officer and Diversity in the Nonprofit world. He speaks and is published internationally. He is the founder of Somos El Poder. the first Latinx fundraising institute in the US

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Sun, Apr 16, 2023

10:45am - 12:00pm

Getting Your ~\$30: Maximizing the Potential of Your Volunteers

Come learn how you can maximize the nearly \$30/hr we save due to our volunteers, while providing a meaningful experience. If you are looking to enhance or build your volunteer program, this is the session for you!

Education Track: Volunteer Involvement

Audience: Applied

#### Speakers

Adrienne McDade Taylor, CFRE, MA, MBA

Skystone Partners - Senior Consultant

Adrienne Taylor is a Sr. Consultant at Skystone Partners. Adrienne started her career in fundraising through the AFP-Greater Cincinnati Chapter's diversity program, New Faces of Fundraising, and now serves on the leadership team. She is the 2023 Greater Cincinnati Chapter President and AFP Global Board Member. Her commitment to IDEA is what keeps her actively engaged with AFP. She is a proud mom, wife, member of Kaleidoscope Investment Group and loves theatrical makeup.

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Sun, Apr 16, 2023

10:45am - 12:00pm

Transitioning Crisis Donors to Mission Donors

During the peak of the racial uprising in 2020, the Detroit Justice Center went from an organization with 300 donors to nearly 20,000 overnight. Donors from across the world were responding to the racial justice crisis. But, what would shift them to long-term investment in a movement?

Education Track: Relationship Building

Audience: Applied

Speakers

Douglas Manigault III, CFRE, MSW

State Innovation Exchange - Vice President of Development

Douglas Manigault III (he/him) has nearly a decade of experience as a movement-focused fundraiser and currently serves as the Vice President of Development at State Innovation Exchange (SiX). In this role, Douglas develops strategies for long-term philanthropic partnerships, provides thought-leadership to the agency regarding effective donor engagement, and manages individual and institutional relationships as a leader on the Development Team at SiX.

Lejla Bajgoric

Detroit Justice Center - Associate Development Director

Lejla Bajgoric serves as DJC's Associate Director of Development. She's deeply passionate about the role fundraising can play in mobilizing community and building power for grassroots movements. Lejla has supported arts & culture and social justice spaces in greater Detroit, including the Arab American National Museum and Muslim Anti-Racism Collaborative. She was a 2020 Racial Equity Fellow with the Detroit Equity Action Lab, a program of the Damon J. Keith Center for Civil Rights.

Regina Sharma, MA

Detroit Justice Center - Development Director

Regina Sharma (she/her) is the founding Development Director for the Detroit Justice Center. A proud Detroiter with over twenty years of experience as a development professional, Regina has dedicated her career to fundraising for organizations she sees as integral to building a thriving community for all Detroiters, including serving in leadership roles at Henry Ford Health, Wayne State University, and as a founding staff member for the Detroit Public Schools Foundation.

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Sun, Apr 16, 2023

10:45am - 12:00pm

The Value of the Golfer Donor - (Presented by GolfStatus)

Golf fundraisers are a lucrative fundraising mechanism, but perhaps more importantly, function to acquire, engage, and retain the golfer donor. This session will discuss why golfers are a valuable donor segment, how to effectively engage them, and how to leverage your golf event to accomplish a number of mission-critical functions.

Education Track: Securing the Gift

Audience: Introductory/Foundational

Speakers

Logan Foote

GolfStatus - Sales and Education Director

Logan Foote first picked up a golf club at age four, and despite thousands of attempts, he's never had a hole-in-one. He earned a bachelor's degree in business administration at the University of Nebraska-Lincoln and pursued a career in sales. Logan came to GolfStatus in 2017, where he channels his passion for golf to help nonprofits raise money.

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Sun, Apr 16, 2023

10:45am - 12:00pm

Donor Pet Peeves and How to Address Them (Presented by Salesforce)

In this interactive and fun session, we will discuss common fundraiser and donor pet peeves and how we can address them. Share and learn how we can delight donors by avoiding some of their common frustrations

Education Track: Securing the Gift

Audience: Strategic

Speakers

Mia Rodrigues

Salesforce.org - Sr. Product Marketing Manager

Mia Rodrigues is a marketing professional at Salesforce where she works on Fundraising solutions for Nonprofits.

Previously, she worked for the World Bank and ran her own education non-profit. Mia studied economics at Columbia University and got her MBA from the Wharton School. She lives in the Bay Area, California with her family and enjoys pop culture news and a good cup of tea.

Nicole Adair

Salesforce.org - Principal Solution Engineer

Nicole Adair has worked at the intersection of nonprofits and technology for more than 20 years. As a Principal Solution Engineer at Salesforce, she helps nonprofit leaders align technology to drive their strategy and power their missions.

Before joining Salesforce, Nicole was a non-profit leader for both the American Red Cross and United Way. She led teams responsible for fundraising, marketing and operations.

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Sun, Apr 16, 2023

10:45am - 12:00pm

Establish, Grow or Reignite Gift Planning in Your Organization (Presented by Catapult Fundraising, Inc. )

Who are our best planned giving prospects? Why planned giving when we need cash in the door now? Where do we even start? Join Jeff for answers to these questions! Planned gifts ensure the future of your organization, so develop a thriving program TODAY that will lead to prosperity tomorrow.

Education Track: Securing the Gift

Audience: Applied

Speakers

Jeff Grandy, M.Ed

Catapult Fundraising, Inc. - Associate Vice President

Jeff Grandy has over a decade of experience and currently leads the Catapult team across the Greater Gulf Coast. Jeff's held leadership positions at Vegas PBS, University of Nevada, Las Vegas, and St. Jude's Ranch for Children. He is an Instructor with the UNLV Non-Profit Management and Fundraising Certificate programs and a Fundraising Operations Mentor for the Center of Philanthropy and Non-Profit Leadership at Rice University. He is a board member of AFP Las Vegas.

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Sun, Apr 16, 2023

10:45am - 12:00pm

Are your leaders leading fundraising?

New research findings about the CEO and Board Chair relationship that can support and drive fundraising in your organisation will be presented and discussed. Current leaders and fundraisers who are aspiring leaders will learn of recommendations for better fundraising, reflecting on leadership styles and fundraising leadership models. Eligible for 1.25 ACFRE credits in Leadership or Management

Education Track: Leadership and Management

Audience: Strategic

Speakers

Margaret Scott, CFRE, MBA, MBus(Research)

Margaret Scott & Associates - Director

Margaret Scott FFIA CFRE (Ret.), is a fundraising leader, Board member and researcher. Margaret is highly regarded in Australia and internationally and sought after as a presenter, mentor and guide to individuals and organisations wanting to raise more funds and develop their Board and organisational leadership. Margaret's focus on fundraising leadership has culminated in PhD studies illuminating the special relationship between CEOs and Board Chairs and the role of Boards in supporting and driving fundraising.

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Sun, Apr 16, 2023

10:45am - 12:00pm

Design Fresh Messaging: How to get the best thinking out of your development team

What if one month from now, your development team had an energizing, creative case for support? In this hands-on workshop, you'll learn strength-based design thinking to spark donor-centric ideation, compelling messaging and fresh ideas. Experience a powerful SOAR framework – Strengths, Opportunities, Aspirations, Results - to take back to your team. Eligible for 1.25 ACFRE credits in Leadership or Management

Education Track: Leadership and Management

Audience: Applied

#### Speakers

Lieve Hendren, CFRE, CFRE, SHRM-CP

Alford Group - Consultant

Lieve Hendren, CFRE, SHRM-CP, has a decade of experience in strategy consulting. Lieve brings a human-centered approach to organizational strategy and complex fundraising campaigns. She helps leaders clarify bold visions, inspire donors, and foster a values-based organizational culture. Lieve has worked with and volunteered for nonprofits of all shapes and sizes, including Clean Energy Trust, The Coastal Community Foundation and The Rockefeller Foundation. Lieve also worked with for-profit clients like McDonald's and Coca-Cola.

Mariah Fosnight, CFRE, CFRE, MBA, MID

Alford Group - Consultant

Mariah Fosnight, MID, MBA, CFRE, is an expert in organizational design. Prior to Alford Group, Mariah worked at The Pittsburgh Foundation where she supported philanthropic initiatives and propelled innovative tactics for maximizing donor cultivation and stewardship. She has pursued advanced education and specialized training in project management, data visualization, writing and editing, strategic planning and donor-centric fundraising. She enjoys improving processes, maintaining data integrity and empowering teams to manage results and accomplish their goals.

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Sun, Apr 16, 2023

10:45am - 12:00pm

It Starts With a Big IDEA: Values Alignment in Fundraising

Many fundraisers are looking for practical ways to integrate IDEA principles into their fundraising programs. In this session, The Osborne Group and the ACLU will use their partnership as a case study to share key learnings and a framework for how to move from vision to implementation. Eligible for 1.25 ACFRE credits in Leadership or Management

Education Track: Leadership and Management

Audience: Strategic

#### Speakers

Donna Leonard

American Civil Liberties Union (ACLU) - Director of Nationwide Development Resources

Donna Leonard has over a decade of experience in the nonprofit sector helping organizations mobilize resources to make bold, transformative change. Currently, she is the director of Nationwide Development Resources at the ACLU, overseeing a team that drives an integrated, strategic, and highly collaborative nationwide major gifts fundraising model. The first of its kind, the unit leverages data analytics, prospect development, capacity building, and learning across 54 affiliates and the national office of the ACLU.

Laurel McCombs

The Osborne Group - Senior Philanthropy Advisor

Laurel brings over 20 years of experience to her work with The Osborne Group. Laurel works closely with clients on topics including donor engagement, development operations, board development, and more. In addition to well-received workshops for national organizations, universities, and others, Laurel has presented at AFP ICON, CASE-NAIS, and AFP Congress. Prior to joining TOG, Laurel worked with Big Brothers Big Sisters of America where she coordinated capacity-building support to agencies across the country.

Robert Osborne

The Osborne Group, Inc. - Principal

Robert brings more than 25 years of experience to The Osborne Group team. A well-known and sought-after international speaker and workshop leader, Robert works with all types of organizations and all sizes. He has conducted well-received and highly rated workshops and keynote addresses for the International Fundraising Congress, AFP, the Association of Healthcare Philanthropy, APRA, ADRP, the International Fundraising Festival, the Fundraising Institute of New Zealand, and many others.

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Sun, Apr 16, 2023

10:45am - 12:00pm

The Secrets of Successful Succession Planning (Sponsored by Lindauer)

Planning to be replaced is not an area many leaders consider. It is essential today to create a transition strategy, leveraging organizational strengths and preparing for change. In this session, we will share tales of succession success, offer tangible lessons learned, and highlight how the process creates access and equity. Eligible for 1.25 ACFRE credits in Leadership or Management

Education Track: Leadership and Management

Audience: Strategic

Speakers

Monique Moore Pryor, Esq.

St. Frances College - Chief Engagement and External Affairs Officer

Monique Moore Pryor, Esq., is an inspirational, results-oriented diversity executive with over 20 years of experience in fostering diverse, equitable, accessible, and inclusive organizations. An entrepreneur and journalist, Pryor co-founded Moms Extraordinaire, Inc., a multimedia company geared toward working mothers. Outside of work, she is a committed community activist, focusing on organizations that promote economic growth, affordable housing, and micro-city developments. She is married with two daughters and lives in New Jersey.

Michael Baker, CFRE

m3 Development - Partner & Founder

Michael J. Baker, CFRE, is a founder and partner of m3 Development, a full-service consulting firm working with non-profits and foundations. His leadership of the firm and consulting efforts has led to a great deal of success for m3 Development clients. Prior to m3 Development, Michael worked with the American Cancer Society, National Hemophilia Foundation and Boy Scouts of America. Michael has over 25 years of experience in the field of philanthropy and non-profits

Amy Wolfe, CFRE, MPPA

Mujeres Poderosas - Partner

Amy Wolfe, MPPA, CFRE, is a partner in Mujeres Poderosas, a collaboration of hard-working, determined and passionate women sharing their collective wisdom for the betterment of non-profit organizations. She has nearly twenty years of non-profit development experience. Amy serves on the boards of directors for Ag Innovations, the Modesto Rotary Club, and the League of Women Voters of Stanislaus County. She, her husband, and their daughter enjoy country life in California.

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Sun, Apr 16, 2023

11:15am - 11:45am

## What is Good Marketing? A Primer with Feathr (Learning Lab)

Looking to unlock more from your marketing? Join us to discover how Feathr helps you run highly targeted campaigns across multiple digital channels, analyze data, and optimize results in real-time. You'll see first hand examples from other nonprofits on how Feathr's Good Marketing Platform helps them increase engagement, drive conversions, and generate more revenue.

### Speakers

Brittany Clifton

Britany Clifton is a Senior Account Director at Feathr, where she consults with nonprofits on impactful ways to do their best digital marketing to fuel their missions. For 14 years, Britany's focus has been fundraising events. She has planned & marketed 100s of events. She's been a Board Member of Stop Children's Cancer & Co-Chair of their 2000-person gala.

Noah Barnett, PhD

Feathr - VP of Feathr

Noah Barnett is a veteran nonprofit fundraising and marketing professional. Currently, he serves as the VP of Marketing at Feathr, the digital marketing platform built to help nonprofits create more engaging digital experiences and expand their impact. Previously, Noah spent over a decade in nonprofit fundraising and marketing leadership roles, most recently as the CMO at Virtuous, and previously at CauseVox, World Help, HubSpot, and The Adventure Project.

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Sun, Apr 16, 2023

11:15am - 11:45am

## Are You Fit to Fundraise? Transforming Your Donation Form for Greater Giving (Learning Lab)

Are you looking to boost your fundraising efforts, bring in more donations, and better support your mission? The solution could be simpler than you think - transforming your online donation form! A well-designed form builds donor trust, improves the donor experience, and makes donating fast and easy, leading to increased gifts. In this interactive session, Donorbox experts will discuss the key elements of a successful donation form through a comprehensive "donation form fitness test." You'll leave with several actionable tips and the knowledge to get your form into shape, helping you raise more funds for your cause.

### Speakers

Jena Lynch

Donorbox - Nonprofit Advocate

As the Nonprofit Advocate at Donorbox, Jena works to help nonprofits make a bigger impact through education, resources, & fundraising tools. She brings several years of experience working in development with a focus on volunteer management, peer-to-peer fundraising, community engagement, & in-kind donations. Jena has led many webinars on effective fundraising for nonprofits, including Donorbox's Powerup: Fundraising Bootcamp and at the Nonprofit Marketing Summit.

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Sun, Apr 16, 2023

12:00pm - 12:30pm

## Accelerate Mission Impact with AI and Microsoft Cloud for Nonprofit (Learning Lab)

See the latest AI innovations from Microsoft and our OpenAI partnership. Explore how your nonprofit can use this cutting-edge tech to increase mission impact through fundraising, volunteer management, program evaluation and more.

Audience: Introductory/Foundationa

### Speakers

Nicole Bechard

As an experienced fundraising and analytics product manager, Nicole has a passion for building delightful products and helping nonprofits achieve new heights using data. As a Senior Product Manager with Microsoft Tech for Social Impact, Nicole is responsible for building innovative fundraising and marketing products designed specifically to meet the nonprofit sector's unmet needs. Prior to Microsoft, Nicole led Blackbaud's predictive analytics product portfolio

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Sun, Apr 16, 2023

12:00pm - 12:30pm

Why America Gives: Insights from 1,000 Donors (Learning Lab)

In 2022, the country faced an international humanitarian conflict, controversial legislative changes, devastating natural disasters and 40-year-high inflation rates. At the same time, giving is being defined in new ways. This session, we will explore what this means for your organization while breaking down the insights from Classy's latest Why America Gives report, which surveyed 1,000 donors to understand their motivations and how the macroclimate is shifting their giving. We'll uncover what makes someone loyal to your organization and how the evolving definition of giving outside of traditional philanthropic models affect donor behavior with nonprofits.

Speakers

Krista Lamp

Classy - Sr. Director, Brand, Events & Communication

Krista Lamp is the Senior Director of Brand, Events, + Communication for Classy, a GoFundMe affiliate and Public Benefit Corporation that enables nonprofits to connect supporters with the causes they care about. Classy's giving platform provides powerful fundraising tools so nonprofits can convert and retain donors. Since 2011, Classy has helped nonprofits raise over \$5 billion. Previously, Krista spent 10+ years at some of the nation's top public relations agencies.

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Sun, Apr 16, 2023

12:45pm - 1:00pm

Social Media and Donor Gratitude - a Perfect Match! (Learning Lab)

You don't need a plaque on the wall or a recognition society to make your donors happy. You can recognize and engage your generous folks using social media. Join Lynne as we discuss what donors benefit most from social media recognition and how you can implement simple tips to take your donor gratitude onto the next dimension online.

Speakers

Lynne Wester

Donor Relations Guru LLC - Founder and Principal

Lynne is well known resource for donor relations and fundraising expertise. She has published four books and been featured in industry publications. Lynne's philosophy is the goal of any great fundraising operation is to use strategic communications and interactions to foster the relationship between the organization and its donors. Using her expertise and hands on approach, she works with organizations to help them keep their focus donor driven, technologically savvy, and strategic.

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Sun, Apr 16, 2023

1:00pm - 1:15pm

Tips & Tools to Maximize Social Media for Your Nonprofit (Learning Lab)

Anyone familiar with using social media for nonprofits knows there are both challenges and advantages. Fortunately, there are tools and resources available for nonprofits on social media. In this high-paced and energetic session, true to form, Josh Hirsch will share some of his favorite tools that every nonprofit communication professional should have at the ready.

Speakers

Josh Hirsch, MS

Barlele - Digital Communications Consultant

Josh Hirsch has worked in the nonprofit sector since 2006 with a focus on educational philanthropy for both public charter and independent private schools. He has an extensive background in social media, digital communications, and marketing along with experience in grant research and writing, individual giving, special event planning, stewardship, and cultivation of donors.

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Sun, Apr 16, 2023

3:15pm - 3:45pm

Easy to Love: Making it Simple for Your Donors to Give (Learning Lab)

Are you making it easy for your donor to give their support? In this lesson we'll look at the options available for your donor to make single and recurring contributions, updating your payment choices to include things like Apple Pay, Venmo, PayPal, Google Pay, ACH, credit card swipers, and Text 2 Give. We'll also show you how to get to know your donors better with tools like surveys, customizable online donation forms, and a donor portal.

#### Speakers

Kimberly Perron, MBA

Kimberly is a Customer Success Instructor providing training and course development for DonorView software. She has over 15 years of experience working in administration and fundraising for a variety of non-profits supporting environmental, arts, and social service causes.

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Sun, Apr 16, 2023

3:15pm - 3:45pm

#### Preparing for the Next Level of Growth (Learning Lab)

How do you strengthen donor relationships that allow you to engage personally and at scale? This session will help you understand how your donor base is interacting with your organization, and what kind of fundraising efforts garner the most engagement, so you can facilitate deeper, more meaningful interactions. Classy and Salesforce will discuss how powerful technologies, including AI and automation, and the right donor journey help you maximize giving and advance your mission.

#### Speakers

Alissa Schovanec

Alissa Schovanec is a Customer Success Manager at Classy.org, where she helps nonprofits strategize and implement their fundraising plans according to current trends and industry best practices. She helps her clients map out the most effective ways to utilize Classy's fundraising technology to acquire, steward, and retain donors. Alissa was born in Omaha, Nebraska, but lives in sunny San Diego, California. She earned her bachelor's degree in marketing from Bradley University.

Nicole Adair

Salesforce.org - Principal Solution Engineer

Nicole Adair has worked at the intersection of nonprofits and technology for more than 20 years. As a Principal Solution Engineer at Salesforce, she helps nonprofit leaders align technology to drive their strategy and power their missions. Before joining Salesforce, Nicole was a non-profit leader for both the American Red Cross and United Way. She led teams responsible for fundraising, marketing and operations.

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Sun, Apr 16, 2023

4:00pm - 5:15pm

#### Digging for Gems: Using Portfolio Reviews and Donor Research to Get to the "YES!"

"Analysis Paralysis" can strike even the most seasoned fundraiser. Learn ways to use research to help manage portfolios to spend more time out of spreadsheets and still have a life outside of work! This interactive session will help you make informed decisions while finding new efficiencies to raise more money.

Education Track: Current and Prospective Donor Research

Audience: Applied

#### Speakers

Julie Upham, CFRE

Conservation International - Vice President, Individual Giving

Julie Naranjo Upham is the VP, Individual Giving at Conservation International. She oversees more than \$60M in revenue through the annual, major, and principal giving teams. She has lead CI's Special Events program and their global Business Councils. In addition to her CI experience, she lead the National MS Society's Major and Planned giving teams and has an MPA in Nonprofit Management. She is a mom of three, AFP-DC Board member, and an avid triathlete.

Taylor McMillan

## National MS Society - VP, Individual and Foundation Giving

Taylor McMillan is the VP, Individual Giving & Foundation Relations for the National MS Society. She is a member of the Leadership team that oversees \$180M annually and her team of 25 raises more than \$50M through midlevel, major, planned, and foundation giving. Prior to this role, Taylor lead all fundraising efforts for the Society's South Central region. She is a mom of two boys, an active mentor of fellow fundraisers, and a travel lover.

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Sun, Apr 16, 2023

4:00pm - 5:15pm

Obstacle schmobstacle! How to go over, under, around, and through to get your YES!

Come ready to play some games to hone your skills to get the elusive YES. Actor, playwright, and fundraiser B. Michael McFarland will lead you through tried and true theatre games to tap your inner actor so you never need fear an ask meeting and get more Yeses!

Education Track: Securing the Gift

Audience: Applied

### Speakers

B. Michael McFarland

HomeFirst Services - Chief Development Officer

An openly gay professional fundraiser with 30 years of experience working almost exclusively in one-person and small shops, B. Michael McFarland has extensive experience in annual giving, major giving, foundation giving, corporate relations, special events, communications, capital campaigns, strategic planning, creating development plans, board relations, and more. Over the course of his career, he has raised in excess of \$50 million for small and medium-sized organizations.

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Sun, Apr 16, 2023

4:00pm - 5:15pm

Elevate your next Event with a Phenomenal Guest Experience

Events are like any business, toiling in the battlefield of consumer attention. We'll breakdown how to elevate the event experience for your constituents. A great event starts with a unique concept and inspiring brand, we will cover the buildup, on-site experience and post event engagement to ensure a solid return.

Education Track: Securing the Gift

Audience: Applied

### Speakers

Amy Milne

Beyond Fundraising Inc - CEO, Chief Experience Officer

A former in-house event planner for some of Canada's largest charity organizations, including SickKids Foundation and Canadian Cancer Society; I am a passionate, award-winning event producer, host of the podcast - Real Talk for the Non-Profit Event Pro, marketing and fundraising expert, entrepreneur, author and speaker. Following my passion for creating life changing events, I founded Beyond Fundraising Inc. to ensure non-profit organizations nation-wide had a loud and meaningful marketing and event voice.

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Sun, Apr 16, 2023

4:00pm - 5:15pm

Don't Judge a Book by Its Cover: Unlock the Value of Every Donor

Getting to know donors as people who have unique lived experiences, values, and intentions, leads to transformational gifts. Using the story of a donor who went from a \$5,000 gift to a \$9.5 million bequest, learn how to listen for the clues that lead to the next ask.

Education Track: Relationship Building

Audience: Introductory/Foundational

### Speakers

Debbie Sokolov, CFRE, MNA

The James Museum of Western and Wildlife Art - Director of Development

Debbie Sokolov is a development professional with more than 20 years experience. She joined The James Museum of Western & Wildlife Art in 2020 as its first development professional. Professional accomplishments include a 60% increase in major giving, a successful \$4.5 million capital campaign, several transformational gifts, and obtaining over \$30 million in endowments. Debbie was featured in Tampa Bay Times about a local man who left \$64 million to local charities in his will.

Sara Leonard, CFRE, MBA

Sara Leonard Group - Consultant

Sara is a solutions-oriented advancement professional with over 30 years of experience in fundraising, board governance and volunteer management for healthcare, educational and cultural organizations. She serves on the AFP Global Marketing, Awards and Communications Committee, is a Past President of the AFP Tampa Bay Chapter and an instructor for the Nonprofit Leadership Center of Tampa Bay where she created the Fund Development Academy.

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Sun, Apr 16, 2023

4:00pm - 5:15pm

Governance as Leadership: A Guide to a Generative Thinking Board

Based on literature from authors Richard Chait and Cathy Trower, the session will explore factors of board composition, leadership, recruitment, orientation, and education and their role a governance as leadership model to offer immediate action items, an understanding of Generative Thinking and real world examples of barriers and successes.

Education Track: Volunteer Involvement

Audience: Strategic

Speakers

Julie Fink, CFRE, MA

Jefferson Health Foundation - New Jersey - Director of Development

Julie Fink is a seventeen-year veteran in nonprofit with experience in healthcare and social services. She currently is the Director of Development for Jefferson Health Foundation New Jersey. She serves as president of her local AFP chapter and a board member of an animal assisted canine therapy nonprofit. She holds her bachelors in communications from Rider University, her masters in nonprofit management and philanthropy from Bay Path University and is a certified fundraising executive (CFRE).

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Sun, Apr 16, 2023

4:00pm - 5:15pm

Faith & Fundraising: Three traditions, Unlimited Questions

Religious donors give more. What if you had Jewish, Muslim and Christian fundraising friends whom you could ask about faith and fundraising? You don't want to ask your donor, and you can't trust the internet. Bring your questions to this safe space to talk about faith and money.

Education Track: Ethics, Accountability and Professionalism

Audience: Introductory/Foundational

Speakers

Irshad Osman, CFRE, MSc

University of Toronto - Senior Development Officer

Osman (MSc, CFRE) is an Imam by training and a fundraiser by profession. He has worked and studied on three continents. Osman works as a Senior Development Officer at the University of Toronto. Passionate about inclusive philanthropy. Supporter of international, and educational causes. He has participated in the Fellowship in Inclusion & Philanthropy, Interfaith Innovation Fellowship project, and KAICIID International Inter-religious Fellowship. Speaker and advocate for social justice, true inclusion, anti-hate, anti-racism, etc.

Ann Rosenfield, CFRE, MBA, AFP Master Trainer

Temple Sinai Congregation of Toronto - Development Director

Director of Development for Temple Sinai Congregation of Toronto, Ann worked with leadership to quadruple unrestricted gifts during the coronavirus crisis. Board member of Rainbow Railroad, a LGBTQI+ refugee charity. Speaker on philanthropy across Canada and internationally including a master class for the International Fundraising Conference in Amsterdam and several courses in San Francisco. Fundraising expert interviewed by the CBC, Toronto Star, Macleans, Associated Press and other media.

Lori Guenther Reesor, MTS, DMin

Lori Guenther Reesor - Principal

Dr. Lori Guenther Reesor (B. Math, MTS, DMin) is an expert in Christian giving (although Mennonites tremble at using the word 'expert' to describe themselves!) She asked Christian donors about their giving during a church basement research tour of Canada. She is delighted that her book, *Growing a Generous Church: A Year in the Life of Peach Blossom Church* is the only theology book with an illustration of a snowblower!

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Sun, Apr 16, 2023

4:00pm - 5:15pm

Inclusive Philanthropy: Who Gives, How, and With What Impact

New research from the Lilly Family School of Philanthropy demonstrates that giving by donors of color and women is shifting the philanthropic landscape, highlighting the importance of developing a more inclusive set of philanthropic practices. This session guides participants through the research and how it can increase giving by all.

Education Track: Relationship Building

Audience: Introductory/Foundational

Speakers

LaKoya Gardner, MA

Mays Family Institute on Diverse Philanthropy - Director of Programs

LaKoya Gardner is the Director of Programs for the Mays Family Institute on Diverse Philanthropy at the Indiana University Lilly Family School of Philanthropy. The Mays Family Institute fosters a greater understanding of the ways in which underrepresented people are both inspired and informed donors by providing knowledge, education, and training. LaKoya also serves as an Associate Director of Development at the School and as a faculty member for The Fundraising School.

Jeannie Sager, MA

Women's Philanthropy Institute - Director

Jeannie Sager is Director of the Women's Philanthropy Institute at the Indiana University Lilly Family School of Philanthropy. WPI believes that gender matters in philanthropy, and that solving the world's complex problems requires perspective, leadership and generosity from women and men. WPI focuses on conducting, curating and disseminating rigorous research that grows women's philanthropy. Jeannie is a seasoned nonprofit executive with over 25 years of experience in health care, higher education, and independent school leadership.

Jacqueline Ackerman, MA

Women's Philanthropy Institute - Associate Director

Jacqueline Ackerman is the Associate Director of the Women's Philanthropy Institute (WPI), housed at the Indiana University Lilly Family School of Philanthropy. She manages all aspects of WPI's research agenda and efforts. Jacqueline joined the Lilly Family School of Philanthropy in 2012 after earning a Master's in Public Administration from the Indiana University—Bloomington O'Neill School of Public and Environmental Affairs. She was raised in Port-au-Prince, Haiti, and resides in Bethesda, MD.

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Sun, Apr 16, 2023

4:00pm - 5:15pm

Meet Today's Donors: How Self-Curated Giving Experiences Are Transforming Fundraising

The pandemic created a 24/7 on-demand, when "I want it" world. New research shows "frictionless" philanthropy matters to donors. Let's explore how to make "ease and choice" central to giving; why it matters, what motivates donors, and their expectations. We'll share case studies that transformed fundraising ease, self-curation, and personalization.

Education Track: Securing the Gift

Audience: Applied

Speakers

Nikki DeFalco

Nikki DeFalco is a National Customer Success Manager at OneCause. She brings expertise in major gifts and signature events to her role, as well as 15 years of nonprofit experience with JDRF at national, regional, and local levels.

Kelly Velasquez-Hague

OneCause - VP Marketing

Kelly Velasquez-Hague has more than 20 years of fundraising, nonprofit management, and marketing experience. Prior to starting her career in fundraising technology, Kelly worked in the nonprofit sector as a Development Director and Event Coordinator. Kelly is passionate about empowering great missions and helping nonprofits reach new donors and raise more funds for their cause.

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Sun, Apr 16, 2023

4:00pm - 5:15pm

Being A Black Male In Fundraising-The Conversation Continues

I'd rather not work with "that" person. I don't have a problem with him, but... These are things that have been said about Black Men in Fundraising. This will be a safe space to talk about real situations and the outcomes. This session is open to everyone that has experienced racism as well as anyone willing and wanting to learn how to be more aware of those situations. Come with an open mind and be ready to listen and share!

Education Track: Relationship Building

Audience: Applied

Speakers

Andre Forbes-Ezeugwu

Albright College - Development Officer

Andre Ezeugwu is currently the Founder and CEO of the advertising agency Ifodige Media Group. Over the past 13 years, Andre has worked for Beasley Media Group, Urban one, Emmis Communications, and Albright College. Helping people succeed and creating opportunities that remove as many obstacles as possible for them to achieve their goals educationally, financially, and economically is Andre's life passion and overall desire for his work.

Marcus Brewer

Change Happens - Director of Development

Marcus Brewer, a native Houstonian, has been Blessed to work in the fund and people-raising space for over 15 years. Much of his experience in fundraising has been in small shops where he's worn many hats. His experience includes foundation relations, corporate relations, strategic partnerships, government relations, marketing, admissions, and a few more. He currently serves as Director of Development for Change Happens in Houston, TX, whose mission is to "Help people empower themselves."

Ken Miller, CFRE

Denali FSP, LLC - President

A dynamic trainer, speaker and consultant, Ken Miller, CFRE is the president of Denali Fundraising & Grant Consultants, a nonprofit fundraising consultancy he founded in 2014 after a long career in development. Ken was awarded his Certified Fund-Raising Executive (CFRE) designation in 2016 and received his AFP Certified Master Trainer (CMT) certificate in 2017. In 2020 he was awarded the Outstanding Professional in Philanthropy by the AFP Alaska Chapter.

Juan McGruder, PhD

Juan was named Director of Development of Georgia Tech Ivan Allen College of Liberal Arts in October 2010. He is the former Associate Vice President for Institutional Advancement at Morehouse School of Medicine in Atlanta, GA. Juan was Director of Development and Assistant Professor of Education at Clark Atlanta University. During his tenure at Clark Atlanta, he served as Special Assistant to the President and Director of Alumni Relations. Prior, he served as Assistant

Director of the Consortium for the Advancement of Private Higher Education at the Council of Independent Colleges in Washington, DC. Juan completed a doctorate of philosophy degree (Ph.D.) in education and human development (higher education) at Vanderbilt University in 1999, where his research areas included historically black colleges and universities, institutional collaborations, and institutional advancement. McGruder earned a master's degree in education at Harvard University in administration, planning, and social policy. He also holds a master's in counseling and human development from Clark Atlanta, an Education Specialist degree in Student Affairs from Western Kentucky University, and a Certificate in Romanesque and Gothic Architecture in Britain and Europe from University of Cambridge, England. His baccalaureate degree is in political science and pre-law from Clark College.

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Sun, Apr 16, 2023

4:00pm - 4:30pm

The State of Nonprofit Marketing & Its Impact on Fundraising Success (Learning Lab)

Looking to unlock more from your marketing? Join us to discover how Feathr helps you run highly targeted campaigns across multiple digital channels, analyze data, and optimize results in real-time. You'll see first hand examples from other nonprofits on how Feathr's Good Marketing Platform helps them increase engagement, drive conversions, and generate more revenue.

#### Speakers

Noah Barnett, PhD

Feathr - VP of Feathr

Noah Barnett is a veteran nonprofit fundraising and marketing professional. Currently, he serves as the VP of Marketing at Feathr, the digital marketing platform built to help nonprofits create more engaging digital experiences and expand their impact. Previously, Noah spent over a decade in nonprofit fundraising and marketing leadership roles, most recently as the CMO at Virtuous, and previously at CauseVox, World Help, HubSpot, and The Adventure Project.

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Sun, Apr 16, 2023

4:00pm - 5:15pm

Using Data to Maximize Donor Efficiencies Leading Up to a Campaign

Kean University Foundation will present on utilizing data-driven efficiencies to maximize the outcomes with prospective principal and major donors leading into a campaign. Participants will become equipped to expedite key donors through the moves management process ultimately securing the foundational philanthropic gifts that the campaign will base its success on.

Education Track: Current and Prospective Donor Research

Audience: Strategic

#### Speakers

William Miller, CFRE

Kean University Foundation - Chief Executive Officer

Bill regularly presents at industry conferences, authors articles for nonprofit and professional publications, and serves as a guest speaker on radio segments and podcasts. He has assisted national and international organizations with major gift initiatives, annual giving programs, planning and feasibility studies, development audits, endowment programs, board training and development, corporate and foundation relations, prospect research, and campaign management. During his career, he has been involved with fund development projects that have raised over \$1,000,000,000.

Edward Ahart, MPA

Kean University Foundation - Chief Development Officer

Ed has been with the Kean Foundation since January 2021. Prior, he spent 4 years in a major gift development role at the University of Delaware as well as assisting various non-profit organizations across New Jersey throughout his career. Ed has demonstrated success establishing industry-academic partnerships that have been key elements to campaigns and regional economic development. Ed has a Master's in Public Administration from Fairleigh Dickinson University with a track in non-profit management.

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Sun, Apr 16, 2023

4:00pm - 5:15pm

Doing it All: How the Mental Load of Motherhood Impacts and Inspires How We Fundraise

Have you ever wondered how the mental load of motherhood is impact your work and the social profit sector at large? What if we could engage in authentic conversation about this topic and understand how authenticity can help inspire and impact our fundraising.

Education Track: Leadership and Management

Audience: Introductory/Foundational

Speakers

Lacey Kempinski, CFRE

Balanced Good - CFRE

Lacey Kempinski, CFRE, the founder and owner of Balanced Good. She is a graduate of McMaster University and Georgian College's Fundraising and Resource Development Program. She is a mission driven fundraiser, with nearly 15 years of experience, fueled by a passion to make an impact for the cause she is championing. As an entrepreneur and business owner, she is now focused on changing the way our sector supports parental leaves and working parents.

Donna Paramore, CFRE

Donna Paramore, CFRE is a native of New Orleans, LA and has been a professional fund raiser for more than 20 years. She is currently the Executive Director of Travelers Aid Society of Greater New Orleans, where they work to end homelessness. Donna earned her bachelor's degree at Dillard University, her Master of Applied Politics at The University of Akron and an additional Master of Management and Public Administration.

Allison Plattsmier, CFRE, Ed. D., CAP, CNP

Edgehill Neighborhood Partnership - Executive Director

Dr. Quintanilla Plattsmier has over twelve years of experience in the nonprofit sector, has worked with 75+ organizations and raised approximately \$5 million. She currently serves as Executive Director of Edgehill Neighborhood Partnership and CEO of AQP Consulting. She was the youngest recipient of AFP's Outstanding Young Professional in 2018 and is a graduate of AFP's WII Leadership Development Program. She currently chairs AFP's Emerging Leaders Mentor program.

Chris Evans, CFRE

Chris is a native New Yorker and has worked for nonprofits in Colorado, North Carolina, and most recently Texas. She fell into fundraising while interning at a mental health support center for eating disorders and earning her BA in Psychology. Her passion for serving her community doesn't stop with her fundraising career; she volunteers for Junior League of Fort Worth and is the 2023 AFP DFW Philanthropy in Action Conference Chair.

Amanda Braet, CFRE

Amanda is a Certified Fundraising Executive (CFRE) with over 18 years of fundraising experience and has completed the Non-Profit Leadership Certificate Program from Brock University. As the Director of Development & Stewardship for Women's Place, she enjoys connecting with Niagara's generous community as they lend their resources to support to women and children experiencing abuse and with their help, work towards ending gender-based violence.

Melissa Tyler

A lifelong New Orleans resident, Melissa Tyler is proud to be a New Orleanian and feels responsible for contributing to positive change in her city. The oldest of four girls and mother of one, she is a natural leader. She has lent her talents to some of the city's oldest and most recognizable charities: the New Orleans Museum of Art, the American Red Cross and Touro Infirmary and was the inaugural Development Director for the

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Sun, Apr 16, 2023

4:00pm - 5:00pm

The A – Z of Becoming a CFRE (Learning Lab)

Is it worth it? What are the tangible benefits? Is the test difficult? this interactive session to learn everything you ever wanted to know about the Certified Fund Raising Executive (CFRE) credential. We'll answer your questions plus dive into

the eligibility requirements, application tips, and all things related to the CFRE Exam. You'll leave the session with a clear understanding of how to earn the CFRE.

Education Track: Ethics, Accountability and Professionalism

#### Speakers

Ashley Gatewood, MBA, PCM

CFRE International - Communications & Marketing Director

Based in Tucson, Arizona, Ashley has been with CFRE International since January 2018. Previously, she was the events and marketing manager at the Fundraising Institute of New Zealand, where she helped bring world-class fundraising programming to the country. She has more than 15 years' experience in nonprofits and trade associations. Ashley is on a life quest to visit 100 countries and, hopefully, become fluent in French.

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Sun, Apr 16, 2023

4:00pm - 5:15pm

Building Pipeline Through Engagement

This panel discussion features experts in clinician engagement who will describe how they started from scratch, selected clinician champions and equipped them for success. Presenters will also describe how their strategic approach to events and major gifts has helped to propel their success.

Education Track: Relationship Building

Audience: Applied

#### Speakers

Trey Joyner

Piedmont Healthcare Foundation - Program Director, Finance and Operations

Trey Joyner joined the Piedmont Healthcare Foundation team in February 2016. With over 15 years of operations and financial program oversight, he provides a keen oversight of philanthropic gifts for the Piedmont Healthcare serving as financial liaison to corporate Finance, executive officers, and system/hospital leadership. Additionally, Trey plays a key role in Foundation strategic planning, project management, overall compliance, and implementation of philanthropic initiatives across the system.

Shade Mokuolu, CFRE

Providence Southern California - Major Gifts Officer

Shade Mokuolu is a Major Gifts Officer with Providence Health and Human Services since May 2021. She connects physicians and clinicians to the funding needs of the medical center and deepen their engagement with the foundation to increase grateful patient referrals. With over a decade combined experience as a Development Director at the Arthritis Foundation and New Horizons, SFV, she consistently builds mission advocates and amplifiers while generating funds.

Michael Delzotti

UK Markey Cancer Center Foundation - President & CEO

Michael Delzotti has over twenty-three years' experience as a leader in the non-profit field. Mike began his nonprofit career as the program administrator for Washington Workshops in DC then spent several years managing hospital departments and clinics in Philadelphia. Returning to philanthropy, he joined a public foundation in Los Angeles then spent time as an executive director of development at UCLA then VP of Development at Special Olympics.

Caleb Dutzer

Advancement Resources - Director, Business Development

Caleb works closely with academic, healthcare, and nonprofit organizations to develop and execute a customized and strategic approach to deepen the culture of philanthropy within each organization while supporting long-term transformation. In addition, Caleb is part of the facilitation team that delivers professional education for healthcare, academic, and nonprofit organizations. Through these engagements, he is involved in many client-focused projects and is honored to serve these organizations in a variety of ways.

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Sun, Apr 16, 2023

4:00pm - 5:15pm

"To Affinity and Beyond: Building a Caring, Engaged Community with Fundraising Intelligence" (Presented by iWave)  
Donors are people and people are complicated. There's more than one way that people support and engage with your nonprofit, but who are they and how do they respond to different messages and channels of communication? In this session we'll look at how you can know much more about your donors through the stories they tell you and fundraising intelligence that can be easily applied to deepen engagement, communicate with donors in the way they're most likely to react and respond, and build stronger fundraising results, higher retention, and develop not just donors but a thriving community championing your mission.

Education Track: Current and Prospective Donor Research

Audience: Applied

Speakers

Mary Côté

Mary has been with iWave for over 4 years as the VP of Product where she has transformed how the company develops and delivers fundraising innovation on a consistent basis since the launch of the new platform in March 2020. Prior to taking over the Product team at iWave Mary had over a decade of experience in both project and product management for a consulting firm in the Health Public sector.

Clay Buck, CFRE, AFP Master Trainer

TCB Fundraising - Founder and Principal

Clay is a thirty-year fundraising veteran and is the Founder and Principal of TCB Fundraising, a nonprofit fundraising and communications consultancy focused on building individual giving at all levels. He has served in leadership roles at a variety of nonprofits across the country and has been a senior consultant with major national firms. He has held the Certified Fund Raising Executive credential since 2010, is an AFP Master Trainer.

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Sun, Apr 16, 2023

4:00pm - 5:15pm

Fundraising Action Planning (Presented by Fundraising Academy)

A fundraising action plan creates a framework and foundation for your organization's activities and programs. Your plan will ultimately set forth how your organization will support the communities you serve day in and day out, and how your fundraising activities ensure the organization's health and growth. Planning clarifies the strategies, values, and vision of an organization. Planning engages the hearts and minds of your staff and board. Planning answers the important questions: "Why does our organization matter? What results do we expect so that we can make a difference?" A proper fundraising action plan provides a roadmap to achieve results.

Education Track: Leadership and Management

Audience: Introductory/Foundation

Speakers

Jack Alotto, CFRE, MA

Fundraising Academy at National University - Trainer

Throughout his career, Jack Alotto, MA, CFRE has served in a variety of fundraising positions in hospital, social service and the arts as development director, major gift and legacy giving manager, and foundation and corporate relations manager. Jack has taught a variety of fundraising classes at the Center for Volunteer and Nonprofit Leadership and JFK University. Jack has served on panels in Strategic Planning, Ethics in Fundraising, Cause Selling and Donor Loyalty and Donor-Centered Fundraising.

LaShonda Williams, CFRE, MPA

South Texas College of Law Houston - South Texas College of Law, Assoc. Director of Alumni Engagement & Annual Giving and Trainer, Fundraising Academy

LaShonda Williams, MPA, CFRE, serves a Trainer for Fundraising Academy, and recently joined the team at South Texas College of Law as the Associate Director of Alumni Engagement and Annual Giving, in the college's centennial year. Ms. Williams leads the charge of developing and implementing alumni engagement strategic planning and acquisition. With

nearly two decades of experience in higher education, LaShonda's mission is to secure philanthropic support for students seeking economic empowerment through education.

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Sun, Apr 16, 2023

4:00pm - 5:15pm

A Stakeholder Management Process for Ethical Fundraising

Ethical theories of management turn on whose interests are considered. In this session, we will engage a process of identifying, prioritizing, mapping claims, engaging with, and monitoring stakeholders. This pragmatic method helps fundraisers and executives ensure their fundraising efforts align their best with their organization's mission, values, and long-term strategy. Eligible for 1.25 ACFRE credits in Leadership or Management

Education Track: Ethics, Accountability and Professionalism

Audience: Applied

Speakers

Ruth Hansen, PhD

University of Wisconsin-Whitewater - Assistant Professor

Ruth K. Hansen, Ph.D. is an assistant professor of nonprofit management at the University of Wisconsin-Whitewater. Her research focuses on the theory and practice of fundraising, and equity and inclusion in resource mobilization. Ruth has more than 20 years' professional experience as a fundraiser, and is a former board member of AFP-Chicago. She speaks regularly on the topics of fundraisers, fundraising, and related issues both nationally and internationally.

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Sun, Apr 16, 2023

4:00pm - 5:15pm

The 2023 Fundraisers' Outlook: 6 Strategic Themes to Drive Your Fundraising Success (Presented by Bloomerang)

Does your organization have challenges with capacity building, board support, leadership, strategic planning, communications or budgeting? Guess what?!? You're not alone. Join us as we geek out with our panel of fundraising experts, Kishshana Palmer, Rachel Muir and others as we dive into the 2023 Fundraising Planning and Climate Study that surveyed 1,000+ small to mid-sized nonprofit organizations. Together we'll analyze the survey data to uncover ways to tackle these challenges and lay the foundation for successful outcomes in 2023 and beyond. Eligible for 1.25 ACFRE credits in Leadership or Management

Education Track: Leadership and Management

Audience: Applied

Speakers

Adrian Sargeant, MBA, PhD

Institute for Sustainable Philanthropy - Co-Director

Adrian Sargeant PhD is Co-Director of the Institute for Sustainable Philanthropy. He is one of the world's leading fundraising academics and was formerly the first Hartsook Chair in Fundraising at the Lilly Family School of Philanthropy at Indiana University. He is the author Fundraising Principles and Practice, Building Donor Loyalty and Fundraising Management: Analysis, Planning and Practice.

Ann Fellman

Bloomerang - Chief Marketing Officer

As the Chief Marketing Officer at Bloomerang, Ann is responsible for the company's overall thought leadership, brand, marketing and community outreach programs that work to strengthen relationships with customers and the broader nonprofit community. Ann brings with her more than 24 years of experience in business-to-business (B2B) marketing in the technology industry, including time spent working at a nonprofit organization.

Rachel Muir

rachelmuir.com - Keynotes, custom training & retreats

Rachel Muir founded Girlstart, a non-profit organization dedicated to empowering girls in math, science, engineering and technology. She started Girlstart in the living room of her apartment with \$500 and a credit card. Several years later she

had raised over 10 million dollars and was featured on Oprah, CNN, and the Today show. She veered away from the typical ED or CEO titles, and her business cards said, Rachel Muir, Girlstart, Fearless Leader.

Josh Meyer, MBA

Bloomerang - VP, Demand Generation

Joshua Meyer brings more than 20 years of fundraising, volunteer management, and marketing experience to his current role as the VP of Demand Generation for Bloomerang. As a member of the Bloomerang marketing team, Josh manages the organization's growth marketing efforts. Through his previous roles at the Human Rights Campaign and OneCause, he is passionate in helping to create positive change and providing nonprofits the tactics.

Kishshana Palmer, CFRE, MBA

Kishshana Palmer is an international speaker, trainer, and coach with a 20+ year background in fundraising, marketing, and talent management who helps leaders create high-performing teams. Kishshana is a NYC girl and mother of one wonderful teenage daughter. Kishshana is the epitome of your classic 90's Queens homegirl and quintessential corner office executive

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Mon, Apr 17, 2023

8:00am - 9:15am

Making the Ask- using (neuro)science in your solicitation

This interactive action learning session offers you 20 radical and flexible tools to solicit your next major gift in person, by phone and even by email. Leave old school moves management techniques behind and learn to use the latest thinking in neuroscience and behavioural science in fundraising.

Education Track: Securing the Gift

Audience: Applied

Speakers

Bernard Ross, MA

=mc consulting - Director

An internationally regarded expert on strategy and behavioral science, he's written, 8 award winning books on fundraising. Breakthrough Thinking won best non-profit book in the USA. He's advised many of the world's leading INGOs: UNICEF, UNHCR, IFRC, ICRC and MSF. He's raised money for Europe's largest scientific experiment, for the biggest refugee camp, to house the world's largest dinosaur in Argentina, and to save the last 800 great apes in Africa.

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Mon, Apr 17, 2023

8:00am - 9:15am

From the Mailbox to the Living Room – Creating an inspiring donor journey

You can bridge direct mail donor transactions into excellent 5-6 figure major donor relationships. Learn to discover shared values leading to your best major/planned giving prospects. Then easily make that sometimes-awkward transition from your annual fund--to your portfolio—to artfully presenting a major gift opportunity in their living room.

Education Track: Securing the Gift

Audience: Applied

Speakers

Timothy Logan, ACFRE, CFRE, AFP Master Trainer, MNO, FAHP, FCEP

The Tim Logan Group - Principal

Timothy D. Logan, FAHP, ACFRE, FCEP is a leader in developing innovative multichannel direct response programs for major and planned giving. He holds a Masters of Nonprofit Management (MNO) from Case Western Reserve University. Tim has over 40 years' experience in fund raising and nonprofit management including 25 years as a direct response fundraising consultant. An AFP certified Master Instructor, he is also an author on fundraising.

Nancy Gerard

Georgia-Cumberland Academy - Director of Alumni and Development

Nancy Gerard has served Georgie-Cumberland Academy as the Alumni and Development Director for two decades. Her fundraising work in the Continuing the Mission Campaign grew giving to GCA from about \$200,000 to \$21 Million in 5 years - transforming the school. Nancy taught for 25 years in secondary/higher educational settings and holds undergraduate and graduate degrees in family studies and educational leadership. Her optimism and solid donor stewardship practices drive her on-going results.

Marcy Heim, CFRE, AFP Master Trainer, CSP, PLCC  
The Artful Asker - CEO

A 30+ year major-giving, international consultant, Marcy Heim, CEO, The Artful Asker trains and coaches Leadership, Boards, and Fundraisers with mindset/method tools for transformational, multi-million, sustained generosity! Her 3-sentence Ask gets a delighted "yes." She raised major gifts at UW-Madison for 2 decades through a \$1.8B campaign before creating major giving success for her clients. An AFP Master, CASE Crystal Apple recipient, rock-band singer, and author, Marcy renews your zest for fundraising and life.

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Mon, Apr 17, 2023

8:00am - 9:15am

Implementing JEDI Strategies into Fundraising Systems: Values in Action

Implementing JEDI strategies within an organization requires intention and investment to ensure lasting change. While internal cultures are often the focus, the business of philanthropy must also be scrutinized and transformed. Learn new strategies to create equitable, anti-racist systems and processes in your organization!

Education Track: Leadership and Management

Audience: Applied

Speakers

Daniel Sims, EMPS, CNE, CDE

Daniel Sims Consulting Group, LLC - Founder and CEO

Daniel Sims is CEO of Daniel Sims Consulting Group, where he connects data-driven DEI strategies to organizations seeking transformational systemic change. Daniel has nearly 15 years' experience in fundraising, coaching, strategic planning, & DEI education. Daniel has managed over 140 campaigns, trainings, and strategic plans, raising \$425 million and training over 5,000 stakeholders. Daniel holds a Master of Public Service from the Clinton School of Public Service and is a member of (For)bes the Culture.

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Mon, Apr 17, 2023

8:00am - 9:15am

Are They Feeling The Love? Using Love Language to Build Donor Identity and Wellbeing

No two organization's donors love in the same way. Talking in donors' love language can sustainably double giving, enhance their well-being, and draw donors closer to the community they are about. Too good to be true? Philanthropic psychology is the science designed to achieve these goals. Come and see!

Education Track: Current and Prospective Donor Research

Audience: Applied

Speakers

Shoni Field

BC SPCA - Chief Development Officer

Shoni Field is the Chief Development Officer at the British Columbia SPCA. She runs a full spectrum fundraising program raising more than \$30 million annually. Shoni has been direct response fundraising for more than 23 years for a range of causes including environmental, youth, health and development organizations. When not fundraising, Shoni advocates for electoral reform and citizen engagement, plays strategy games and bakes fancy cakes.

Jen Shang, PhD

Institute for Sustainable Philanthropy - Co-Director

Jen Shang is Co-Director and Professor of Philanthropic Psychology at the Institute for Sustainable Philanthropy. Jen's research has been featured by outlets such as the BBC and the Wall Street Journal. Her research has been funded by the

Society of Judgment and Decision Making, the National Science Foundation, The Aspen Institute, the Corporation for Public Broadcasting, the Association of Fundraising Professionals, and the Hewlett Foundation.

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Mon, Apr 17, 2023

8:00am - 9:15am

Making Sense of Fundraising: A Fundraiser's Guide To What's Working in 2022 And Beyond

Our knowledge about fundraising is growing by leaps and bounds, but how do we make sense of all the different reports? In this session we'll dig deep into current trends, workshop what works best, and create a plan for you to use to implement the newest methodology in your shop.

Education Track: Current and Prospective Donor Research

Audience: Applied

Speakers

Clay Buck, CFRE, AFP Master Trainer

TCB Fundraising - Founder and Principal

Clay is a thirty-year fundraising veteran and is the Founder and Principal of TCB Fundraising, a nonprofit fundraising and communications consultancy focused on building individual giving at all levels. He has served in leadership roles at a variety of nonprofits across the country and has been a senior consultant with major national firms. He has held the Certified Fund Raising Executive credential since 2010, is an AFP Master Trainer.

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Mon, Apr 17, 2023

8:00am - 9:15am

Short staff ? Don't be Cheap... Its too Expensive !

You are having difficulty keeping your staff ? They feel overworked and underpaid ? Stop being cheap, its too expensive. Build your case for your board of trustees to support a salary increase and winning conditions to keep your team on board and loyal.

Education Track: Leadership and Management

Audience: Applied

Speakers

Karine-Iseult Ippersiel, BA

Quebec Breast Cancer Foundation - President

An authentic manager advocating collective creativity, her passion for the cause is based on her desire to positively influence the present and future of the breast Cancer cause. With her experience in events, sales, sponsorship, and philanthropy, she has developed a solid expertise while initiating numerous strategic alliances. Her awareness of others and their reality is a testament to her openness and ability to adapt. She thrives on problem solving, navigating in demanding, fast-paced environments.

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Mon, Apr 17, 2023

8:00am - 9:15am

Beyond Sponsorship: Winning Strategies for Driving Impact through Corporate Partnership Innovation

Amplify impact by moving beyond traditional event sponsorship or corporate philanthropy towards innovative, value-add corporate partnerships. Learn the mindset required to leverage these types of partnerships, and key ingredients for success. See Canadian examples including The Black Entrepreneur Startup Program, an innovative partnership between Futurpreneur Canada and RBC.

Education Track: Relationship Building

Audience: Strategic

Speakers

Shelley Mayer

Ramp Communications Inc. - Founder and President

Shelley Mayer, CM is founder & president of Ramp Communications, a certified B Corporation and award-winning creative agency. Shelley has expertise in every facet of social impact branding & advertising, and has worked with more

than 80 non-profits & social enterprises. Shelley holds a BBA degree from Wilfrid Laurier University and is a member & Chartered Marketer (CM) with the Canadian Marketing Association, where she serves as a sector expert for the CMA NFP Council.

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Mon, Apr 17, 2023

8:00am - 9:15am

Our New Normal: Fundraising in a Post-Pandemic World (Presented by Salesforce)

The CDC Foundation has been at the forefront of combatting the COVID-19 pandemic since January 2020 and saw tremendous fundraising growth from a tsunami of generosity. Learn about the organization's efforts to retain these new donors and transition them from "crisis donors" to "mission donors" – donors who continue to give because they believe in the ongoing impact and mission of the organization. Hear how the organization effectively scaled its fundraising, the steps it has taken to accommodate this exponential growth, and the innovative strategies it has adopted to sustain momentum and keep donors engaged in a post-pandemic world.

Education Track: Leadership and Management

Audience: Applied

Speakers

Laura Croft

Laura Croft holds non-profit and private sector expertise in fundraising, management, and business development. In her current role, she drives strategic direction for all revenue streams and leads a team to build innovative public-private partnerships to fight global threats to health and safety. Before joining CDC Foundation, Laura served as director of development for The Children's Museum of Atlanta leading all advancement initiatives. Her career also includes work as a major gifts officer with The

Sterrin Bird, CFRE

Salesforce - Senior Director, Nonprofit Industry Advisor

Sterrin joined Salesforce in July 2020 after spending 28 years in the nonprofit sector. A nationally recognized leader in the nonprofit community, Sterrin has nearly three decades of experience in service to philanthropy, with particular emphasis (and passion) for transformational giving. In the years before becoming a development officer herself, Sterrin was a development consultant at three major international consulting firms and eventually founded her own consulting practice in 2010.

Elizabeth Patrick

CDC Foundation - Director of Advancement Services

Elizabeth Patrick leads the CDC Foundation's advancement services team, which includes responsibility for donor and constituent data, annual giving fundraising efforts, stewardship and organizational reporting, gift compliance and research, as well as gift records management. Elizabeth has more than 20 years of experience working in nonprofits in communications and development roles in higher education, healthcare and environmental nonprofits and museums.

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Mon, Apr 17, 2023

8:00am - 9:15am

Don't Let the Donor Die at the Destination (Presented by Fundraise Up)

Your nonprofit invests heavily in messaging, imagery, value proposition, paid search and social strategies - but the ROI on your efforts is half of what it could be if the destination, the donation experience, is not converting. We'll discuss working backward in the journey to ensure a higher impact from your teams' efforts.

Speakers

Salvatore Salpietro

Fundraise Up - Chief Partnerships Officer

Salvatore Salpietro is Chief Partnerships Officer of Fundraise Up, a technology company unlocking the world's generosity potential by optimizing how people give. He leads nonprofits from understanding the platform through to installation and integration planning. Previously, he served as digital director of the Child Mind Institute as well as a co-founder of

the ISEBOX content platform. With a background in both technology and nonprofits, he understands the needs of both and bridges the gap.

Bart Lillie

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Mon, Apr 17, 2023

8:00am - 9:15am

The Future Is Digital: Learnings From The 2023 Nonprofit Acceleration Report (Sponsored by Bonterra)

Tech adoption is moving forward with lightning speed. But, what digital strategies are driving the most growth and highest ROI? Join Cameron Ripley, CEO of Community Boost, as he uncovers the latest digital marketing trends that raised over \$40M in online revenue for over 400 nonprofits in 2022.

Education Track: Securing the Gift

Audience: Applied

Speakers

Cameron Ripley

Community Boost Consulting - CEO

Cameron Ripley (he/him) is the CEO of Community Boost, a digital marketing agency that specifically helps nonprofits accelerate and scale revenue and impact. Since founding Community Boost in 2012, CBC has directly served over 1,000 nonprofits and helped raise over \$100MM. Cameron is also the founder of the Nonprofit Marketing Summit, the world's largest virtual nonprofit conference that regularly convenes over 25,000 nonprofit professionals.

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Mon, Apr 17, 2023

8:00am - 9:15am

Stewarding Planned Donors (Presented by Blackbaud)

When was the last time you reached out to your planned givers? In this advanced session, learn how to keep planned givers actively engaged with your organization so that they feel like recognized and valuable partners. Come prepared to brainstorm, share, and learn strategies that you can implement at your organization.

Education Track: Current and Prospective Donor Research

Audience: Applied

Speakers

Matt Connell

Matt Connell is a Blackbaud University Instructor at the Principal level, and the lead instructor for nonprofit organizational best practices and fundraising. Matt has been a contributor to sgENGAGE, NonprofitPRO, npEXPERTS, and the Blackbaud Community and has presented at bbcon and AFP events. As an educator to the social good sector, Matt helps to grow the expertise and advance the knowledge of those working to do the most good for the world we share.

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Mon, Apr 17, 2023

8:00am - 9:15am

Developing a Gift Acceptance Policy That Aligns With Organizational Values

"We can't accept funds from any entity that has negatively impacted our clients." This was our newly formed development department's first directive. How do we navigate funding opportunities from entities that want to invest in racial justice work while acknowledging the harm caused by their historical contributions to systemic racism? Eligible for 1.25 ACFRE credits in Leadership or Management

Education Track: Ethics, Accountability and Professionalism

Audience: Applied

Speakers

Douglas Manigault III, CFRE, MSW

State Innovation Exchange - Vice President of Development

Douglas Manigault III (he/him) has nearly a decade of experience as a movement-focused fundraiser and currently serves as the Vice President of Development at State Innovation Exchange (SiX). In this role, Douglas develops strategies for

long-term philanthropic partnerships, provides thought-leadership to the agency regarding effective donor engagement, and manages individual and institutional relationships as a leader on the Development Team at SiX.

Lejla Bajgoric

Detroit Justice Center - Associate Development Director

Lejla Bajgoric serves as DJC's Associate Director of Development. She's deeply passionate about the role fundraising can play in mobilizing community and building power for grassroots movements. Lejla has supported arts & culture and social justice spaces in greater Detroit, including the Arab American National Museum and Muslim Anti-Racism Collaborative. She was a 2020 Racial Equity Fellow with the Detroit Equity Action Lab, a program of the Damon J. Keith Center for Civil Rights.

Regina Sharma, MA

Detroit Justice Center - Development Director

Regina Sharma (she/her) is the founding Development Director for the Detroit Justice Center. A proud Detroiter with over twenty years of experience as a development professional, Regina has dedicated her career to fundraising for organizations she sees as integral to building a thriving community for all Detroiters, including serving in leadership roles at Henry Ford Health, Wayne State University, and as a founding staff member for the Detroit Public Schools Foundation.

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Mon, Apr 17, 2023

8:00am - 9:15am

ROI of Strategic Action Planning: Preparing Teams to Dramatically Increase Impact and Revenue

Is your organization considering engaging in strategic planning? Explore two case studies where strategic planning produced significant increases in both community impact and revenue. Even more importantly, these efforts are shifting existing assumptions in local communities around poverty, hunger and environmental sustainability using an equity lens.

Eligible for 1.25 ACFRE credits in Leadership or Management

Education Track: Leadership and Management

Audience: Strategic

Speakers

Teri Beckman, MA

HIGOL - CEO

With 30 years of experience in the nonprofit sector, Teri founded HIGOL, where she and her team help nonprofit leaders increase revenue and community impact by an average of 50% within twelve months. Leading various efforts in community development, she has directed fund raising efforts ranging from \$500,000 to \$15 million. She understands leadership challenges and is a strategic advisor/consultant to CEOs and their teams throughout the United States as they grow their organizations.

L. Ron Pringle

Inter-Faith Food Shuttle - CEO

With over 20 years' experience in nonprofit leadership, Ron Pringle serves his community at Inter-Faith Food Shuttle. Raised in South Carolina, Ron received a BA in Human Services from Springfield College in Charleston. He served as Assistant Chaplain in the U.S. Airforce during Desert Storm, then returned home to Charleston, beginning his career in food banking, coming to the Food Shuttle as President and CEO in May of 2020, as their first African-American CEO.

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Mon, Apr 17, 2023

9:15am - 9:45am

Accelerating Mission Impact with Microsoft's Affordable Technology Solutions (Learning Lab)

Join us to learn how Microsoft's technology can empower your nonprofit with accessible and cost-effective solutions.

From secure collaboration tools to donor management and fundraising, as well as cloud infrastructure and Surface devices, Microsoft offers a comprehensive range of options to support your mission. Learn more:

[microsoft.com/nonprofit](https://microsoft.com/nonprofit).

Speakers

## Cheryl Hairston

Cheryl Hairston is responsible for enabling nonprofits to realize and achieve their missions through Microsoft services and cloud solutions. Cheryl has twenty years of successful IT sales experience with 3 years directly dedicated to the Non-Profit industry. Cheryl holds a Bachelor of Science degree from Pennsylvania State University and professional certificates from the Wharton School of Business (Univ of Pennsylvania) and Insead International Business School (Fontainebleau, France).

## Lisa Stapleton, MBA

Lisa M. Stapleton is responsible for enabling nonprofits to realize achieve their missions through Microsoft services and solutions. Lisa brings to this assignment 20+ years of delivering results in sales, marketing and customer success management positions for such firms as Fidelity Investments, Hewlett-Packard and Cognizant Technology Solutions. Lisa was graduated from Boston College with a BA magna cum laude and from Yale University School of Management with an MBA

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Mon, Apr 17, 2023

9:15am - 9:45am

### Cultivating Donors through Travel (Learning Lab)

Learn how experiential travel can accelerate the cultivation period of donors. Spend a weekend at a magical location with your most dedicated supporters; create an unforgettable experience that builds relationships and nurtures fundraising. The costs of acquiring a new donor can be six times more than retaining an existing donor. Just as important, donors who give over multiple years give much more than those who don't. Build with current contributors by looking to the future. Long-term relationships are less transactional and more personal. The time it takes to cultivate planned giving is abbreviated by Donor Experience Engagement Program (D.E.E.P.) weekends, which optimize your fundraiser's relationship-building efforts.

### Speakers

Jason Champion

Winspire - VP Of Business Development

Chief marketer and business developer with Winspire, a global provider of luxury experiences for charity auctions and fundraisers. I am responsible for the next-stage corporate brand vision as the company's branding leader, driving performance via product and service innovation, strategic brand planning and positioning, multiplatform content marketing and communications, creative, digital campaigns, customer success, and business development.

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Mon, Apr 17, 2023

10:00am - 10:30am

### The Easy Way to Plan & Manage Golf Fundraisers (Learning Lab - GolfStatus)

Golf tournaments are a lucrative fundraising opportunity for any nonprofit. Technology makes it easier than ever to organize and manage golf fundraisers, whether you're a first-timer or veteran event planner. Hear how powerful, user-friendly technology streamlines golf fundraisers to save organizers time and raise more money for your mission.

### Speakers

Logan Foote

GolfStatus - Sales and Education Director

Logan Foote first picked up a golf club at age four, and despite thousands of attempts, he's never had a hole-in-one. He earned a bachelor's degree in business administration at the University of Nebraska-Lincoln and pursued a career in sales. Logan came to GolfStatus in 2017, where he channels his passion for golf to help nonprofits raise money.

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Mon, Apr 17, 2023

10:00am - 10:30am

### Understanding Today's Donor: How to Design Systems That Build Lasting Relationships With All Your Supporters (Learning Lab)

Today's donor is distracted. Hyper-connectivity, micro-consumption, fractured attention, and fierce competition are namesakes in our connected economy. This is now compounded due to the upheaval the 2020 global health and

economic crisis sparked with no clear end in sight. Amidst uncertainty and shifting donor expectations, how can you ensure your organization is prepared for these changes, and able to scale deeper, more personalized donor experiences?

#### Speakers

Erik Tomalis, CFRM

Virtuous - Chief Evangelist & Director of Business Development

Erik Tomalis is a proven fundraising professional that is forward thinking, people driven, but most of all results oriented. With over 20 years of professional fundraising experience, Erik made over 4,000 face-to-face donor solicitations where he has raised millions of dollars for many non-profit organizations. Through all of this, Erik understands how nonprofits can grow global generosity through Responsive Fundraising. He resides in Pittsburgh with his wife, Kate and their shetland sheepdogs (Winnie & Willett).

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Mon, Apr 17, 2023

10:15am - 11:30am

Donor Acquisition vs Donor Retention: Where to focus your money

Some will tell you to focus on acquisition. Others will tell you to focus on retention. Both are important, but do you know when you should apply time and energy to each? We are going to deep dive into the age old argument and understand when to invest in each.

Education Track: Relationship Building

Audience: Applied

#### Speakers

Kirk Schmidt, B.Math

Alberta Cancer Foundation - Director Fundraising Optimization & Business Intelligence

Kirk is a master of metrics. Combining years of fundraising and consulting with a background in mathematics, he is constantly working on new and robust ways to measure fund development to create better results. Kirk has been a fundraiser, and has managed teams in fundraising systems, donations processing, direct response, mid-level giving, monthly giving, online and social giving, merchandising, analytics, research, and volunteers.

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Mon, Apr 17, 2023

10:15am - 11:30am

Pulling the Heartstrings - Telling Your Story Effectively

Writing to raise funds is a specific skill. It's more than a standard annual appeal. We'll work together on the process of creative writing for results - the preparation, the research, the brainstorming, the plan. You'll leave with concrete ideas that can effectively change the way you communicate.

Education Track: Securing the Gift

Audience: Applied

#### Speakers

JC Patrick

JC Patrick Consulting - Principal

JC has 30 years of professional fundraising experience and an extensive background in creative writing and marketing. She specializes in writing donor communications, program analysis, and marketing plan designs. JC spent ten years as the Station Development Manager for NPR. She is a frequent presenter at industry conferences and holds a BA in Radio/TV from the University of Houston. She is currently working towards her CFRE.

Alice Ferris, ACFRE, CFRE, MBA, AFP Master Trainer

GoalBusters Consulting - Partner

Alice L. Ferris, MBA, CFRE, ACFRE, is the founder of GoalBusters, supporting small fundraising teams with development training, coaching, strategy, and implementation. For the last 30 years, she has worked extensively in fundraising for public media, rural healthcare, education, and science organizations. Alice thrives in finding creative solutions for the fundraising challenges of small organizations and teaching and training about practical and realistic tactics.

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Mon, Apr 17, 2023

10:15am - 11:30am

### How to Plan an Effective Capital Campaign Using New Tools and Technology

A capital campaign is likely the largest amount you have ever tried to raise. The good news is that there are tools, technology, and virtual resources to help you succeed. Join Amy Eisenstein to learn how to prepare an effective and efficient campaign strategy and plan.

Education Track: Securing the Gift

Audience: Applied

#### Speakers

Amy Eisenstein, ACFRE

Capital Campaign Pro - CEO

Amy Eisenstein, ACFRE is CEO and Co-Founder of Capital Campaign Pro. Her published books include Major Gift Fundraising for Small Shops and 50 A\$ks in 50 Weeks. Amy became an AFP Distinguished Fellow in 2021, an AFP Master Trainer in 2009, served as the president of AFP-NJ in 2014 and 2015, and is an active volunteer with AFP. Amy became a Certified Fundraising Executive (CFRE) in 2004 and received the ACFRE, in 2013.

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Mon, Apr 17, 2023

10:15am - 11:30am

### Visualizing Data for Prospect Identification and Donor Metrics

Data analytics is a buzz phrase that everyone is using. Visualization and dashboards go beyond the use of Microsoft Excel. Microsoft Power BI and Tableau are platforms that can increase visibility and value for your fundraising team.

Education Track: Current and Prospective Donor Research

Audience: Applied

#### Speakers

Joseph Stabb, PhD, APR, TE, ACUE

University of Tennessee, Knoxville - Assistant Professor of Practice

Joe Stabb has utilized resources to meet and exceed revenue goals with experience in marketing communications, public relations, fundraising, and nonprofit management and leadership. Joe graduated from Utica University with a B.S. in Public Relations, a M.S. from Keuka College in Management, and has a Ph.D. in Leadership and Policy from Niagara University. Stabb holds an advanced certificate, international trade and commerce (TE), accreditation, public relations (APR), and an advanced certificate, effective college teaching (ACUE).

Emily Marcason-Tolmie, MA, MFA

Skidmore College - Director, Prospect Management, Research and Analytics

Emily has worked in prospect development for nearly 15 years. She's an expert in prospect management, proactive and reactive research, analytical procedures, and trend forecasting, while focused on successfully building robust prospect pipelines, predictive donor modeling, and key fundraising metrics. She is a 2018 graduate of the Skidmore College Leadership Academy. Emily was elected president of the APRA-NY board in October 2020 after serving a term as the board's vice president and as a member-at-large.

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Mon, Apr 17, 2023

10:15am - 11:30am

### Deliberate Design for Successful Board Governance & Composition: A Case Study

Significant challenges continue to distract Boards. Board Chairs and CEOs cite problems in achieving diversity, recruiting candidates, improving fundraising, understating responsibilities and thinking strategically. This session is a case study of how one organization assessed its Board challenges and developed strategies to strengthen and diversify the Board within two years.

Education Track: Volunteer Involvement

Audience: Applied

#### Speakers

Vanessa Wise, MBA

The WNET Group - Vice President of Development

Vanessa Wise is the Vice President of Development at The WNET Group, New York's flagship PBS Station. She leads a team of 60 and is responsible for annual fundraising of \$42M in general operating dollars and \$55-65M in program support. Prior to joining The WNET Group, Wise served as Vice President of Development for New York City Center, Director of Development for The Julliard School and Senior Brand Manager at Time Inc.

Peter Hansen, CFRE

Hansen Philanthropic Solutions/Arts, Culture, & Media Philan - Principal

Peter Hansen is an accomplished fundraising executive with 35 years of experience as a chief development officer and strategic fundraising consultant for large organizations. He has raised \$500M, helped to build one of the nation's largest performing arts centers and reimagined fundraising operations for multiple institutions. Hansen Philanthropic Solutions provides strategic fundraising counsel in the arts and public media. He is a former President of AFP-NJ and serves on the AFP US Foundation for Philanthropy.

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Mon, Apr 17, 2023

10:15am - 11:30am

How to Align Donor's Heart and Mind With Our Fundraising Desires

Improve your fundraising and Donor retention by learning the top ten big secrets to seduce Donors and make their hearts beat and enlighten their minds. Philanthropy is not only about signing a check. Our next challenge is to humanize digital fundraising and networking.

Education Track: Securing the Gift

Audience: Introductory/Foundational

Speakers

Leticia Becerril-Palacios, MA, FTA

Ayuda y Solidaridad con las Ninas de la Calle, IAP - CEO

Leticia has a B.A. in International Relations from the Instituto Tecnologico Autonomo de Mexico, a Master's degree in Social Responsibility, and a Diploma of Sustainable Development. She is currently CEO of the Children's home Ayuda y Solidaridad con las Niñas de la Calle, and previously served as CEO of Worldfund Mexico in teachers' training. Since 2005, Leticia is an active member of CASE and AFP Mexico City Chapter. Actually, the Secretary of the Board.

Carlos Madrid, MA

AFP Mexico Foundation - AFP Mexico Foundation Treasurer

Carlos Madrid has more than 22 years of experience in Institutional Development and Fundraising, holds a Bachelor in Communication, and two Masters. He is an accredited consultant, and Board member for diverse institutions. Director for Development of the Hospital Infantil de Mexico (1994- 2013) and Director of the Banorte and Grumma Foundations (2006-2013); past Chairman of the Junta de Asistencia Privada del Distrito Federal (2014-2020). Actually, independent consultant mainly in Board Development and Corporate Volunteering.

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Mon, Apr 17, 2023

10:15am - 11:30am

A Narrative for Professional Fundraisers

To respond to the ever-changing context of philanthropy and fundraising in our world today, come learn what AFP Canada has developed to prepare fundraisers to be positive ambassadors for their organizations and profession. Over 500 fundraisers have already been trained on the "new narrative" to be able to share the positive impact of our profession across the charitable sector. Feedback from those who have taken this training includes "very valuable training", "important content", "brought many great points to the conversation and I plan to start approaching my work with donors differently as a result."

Education Track: Ethics, Accountability and Professionalism

Audience: Strategic

Speakers

Nancy Dossous, CFRE

McGill University Health Centre Foundation - Director, Development

Nancy Perry Dossous, CFRE is Manager, Major Gifts for the McGill University Health Centre Foundation in Montreal, Quebec. She has worked in a variety of roles over the past seven years from annual giving, stewardship, recognition events and major gifts, and through each one she has gained new insights into leveraging donor motivations to maximize engagement and support. She views philanthropy as a powerful tool for the advancement of equity.

Jennifer Johnstone

Central City Foundation - President & CEO

Jennifer Johnstone President & CEO of Central City Foundation, an organization working to improve the lives of people in need in Vancouver's inner city. CCF pursues this agenda through community-centered philanthropy rooted in a commitment to truth, justice and reconciliation. CCF owns sustainable social purpose real estate properties and builds relationships with leading community organizations to create the opportunities for investments in community-led solutions. Jennifer is currently the Chair of the board of AFP Canada.

Krishan Mehta, PhD

Toronto Metropolitan University - AVP, Engagement

Dr. Krishan Mehta is an advancement leader with extensive experience in transformational philanthropy and partnerships, capital campaigns, strategic planning, marketing and communications and stewardship. Dr. Mehta is also a researcher who studies the charitable activities of immigrants and diaspora communities in Canada. In 2021, Dr. Mehta received the Outstanding Fundraising Professional of the Year Award by AFP Toronto and he was named an AFP Distinguished Fellow in 2022.

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Mon, Apr 17, 2023

10:15am - 11:30am

Trauma-Informed Fundraising - Understanding Your Role and the Donors

Nonprofit organizations utilize trauma-informed care to promote hope, healing, and resilience to individuals, families, groups, and communities. Understanding the science of trauma-informed care, adverse childhood experiences, resilience, and DEI (diversity, equity, and inclusion) and adopting a practical trauma-informed approach to fundraising leads to meaningful conversations that foster collaboration.

Education Track: Relationship Building

Audience: Introductory/Foundational

Speakers

Lisa Temoshok

Lisa Temoshok, LMHC - Psychotherapist

Lisa has 20 years of experience working collaboratively with clients of diverse ages and cultures as a yoga and meditation instructor and psychotherapist. She specializes in PTSD and healing the traumas and losses that impact all of us through Mindfulness-based somatic therapy (MB-CBT), Eye Movement Desensitization and Reprocessing (EMDR) and Internal Family Systems (IFS). Lisa enjoys bringing these evidence-based skills to professional groups to promote creativity, ease and joy.

H. Aldervan Daly, CFRE, MFA

Rising Ground - Rising Ground

H. Aldervan Daly, CFRE, is the Executive Vice President for Institutional Advancement for Rising Ground, a 191-year-old human services organization serving 25,000 children, adults, and families throughout New York City. Aldervan shares his fundraising insight in the blog "The Thoughtful Approach To...", which offers practical advice for modern fundraisers. He earned an MFA in fundraising and marketing, from Virginia Tech and a BA from Rhodes College. He and his family live in Brooklyn, NY

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Mon, Apr 17, 2023

10:15am - 11:30am

Solving the Childcare Crisis in the Nonprofit Sector

With many women forced out of the workforce during the pandemic, how can we create inclusive workplace policies that are family-friendly and allow our employees to thrive both personally and professionally given the lack of options for working parents at this juncture?

Education Track: Leadership and Management

Audience: Applied

#### Speakers

Allison Plattsmier, CFRE, Ed. D., CAP, CNP

Edgehill Neighborhood Partnership - Executive Director

Dr. Quintanilla Plattsmier has over twelve years of experience in the nonprofit sector, has worked with 75+ organizations and raised approximately \$5 million. She currently serves as Executive Director of Edgehill Neighborhood Partnership and CEO of AQP Consulting. She was the youngest recipient of AFP's Outstanding Young Professional in 2018 and is a graduate of AFP's WII Leadership Development Program. She currently chairs AFP's Emerging Leaders Mentor program.

Chessie Biggam, CFRE, MPA

AQP Consulting - Fundraising Consultant

Chessie Hayes has been an active member of the fundraising community and implements thoughtful, strategic plans to enhance donor engagement. She was an Adjunct Professor at the University of Memphis teaching Resource Development and Nonprofit Storytelling. She received the award for AFP Global's Outstanding Young Professionals. She was awarded the Outstanding Emerging Philanthropist from her local AFP chapter. She serves as the President-Elect for AFP Memphis and on the Emerging Leaders Initiative for AFP Global.

El Cabrel Lee

El Cabrel Lee is a seasoned fundraiser experienced in building new partnerships and strategic alignment focused on revenue generation strategies, talent development, community and capacity-building. At Frontline and LRC, El partners with nonprofits and individuals on governance, program alignment, and growth initiatives, including building major gifts programs, special events, advancing investments, and capital campaigns.

Adrienne McDade Taylor, CFRE, MA, MBA

Skystone Partners - Senior Consultant

Adrienne Taylor is a Sr. Consultant at Skystone Partners. Adrienne started her career in fundraising through the AFP-Greater Cincinnati Chapter's diversity program, New Faces of Fundraising, and now serves on the leadership team. She is the 2023 Greater Cincinnati Chapter President and AFP Global Board Member. Her commitment to IDEA is what keeps her actively engaged with AFP. She is a proud mom, wife, member of Kaleidoscope Investment Group and loves theatrical makeup.

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Mon, Apr 17, 2023

10:15am - 11:30am

Outside the Box Engagement

During this presentation, participants will discover new avenues to community engagement to diversify pipeline streams and fully grasp the breadth of the opportunity. Through an international perspective, presenters will describe their approach and best practices for cultivating an 'outside the box' support base.

Education Track: Volunteer Involvement

Audience: Introductory/Foundational

#### Speakers

Jennifer Borcharding

Eastern Iowa Health Center - Director of Development and Marketing

Jennifer Borcharding is the Director of Development & Community Relations for Eastern Iowa Health Center, a Federally Qualified Health Center, in Cedar Rapids, Iowa. There she has secured over \$2M in less than 2 years to build a new dental facility, secure a free-to-patient transport bus, and support ongoing programmatic needs. Jennifer specializes in strategic partnerships, grant writing, and brand recognition. Borcharding also serves on her local school board and her state school board. With

Melissa Swindell

BC Children's Foundation - Associate Director, Corporate Partnerships

Melissa Swindells is a seasoned fundraiser with a deep passion for inspiring philanthropy in healthcare. In her current role at BC Children's Hospital Foundation, Melissa provides strategic direction to the Corporate Partnerships team. She thrives when creating meaningful opportunities for corporate partners, their employees and their customers, inspiring them to give generously to change the landscape of pediatric health care. Melissa is a proud volunteer with the AFP Greater Vancouver Chapter.

Mike Logue

KCI Canada - Partner

As one of KCI's most senior staff, Michael has had the opportunity to work with a wide array of non-profit organizations across Canada. As a result, he brings tremendous insight into the new and unique initiatives that leading non-profits are incorporating into their development strategies. Since joining KCI in 1993, Michael's proven leadership and experience in all aspects of development have been sought after by KCI's clients time and time again.

Caleb Dutzer

Advancement Resources - Director, Business Development

Caleb works closely with academic, healthcare, and nonprofit organizations to develop and execute a customized and strategic approach to deepen the culture of philanthropy within each organization while supporting long-term transformation. In addition, Caleb is part of the facilitation team that delivers professional education for healthcare, academic, and nonprofit organizations. Through these engagements, he is involved in many client-focused projects and is honored to serve these organizations in a variety of ways.

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Mon, Apr 17, 2023

10:15am - 11:30am

Digital Philanthropy: Relationship-Building through Online Fundraising Strategies (Presented by Fundraise Academy)

Donors are consistently exposed to a great number of emails and digital touchpoints. How do you rise above the noise, make your organization stand out, and showcase your cause's impact in a way that motivates donors to give? Learn how to connect with your donors through an intentional digital strategy. Analyze email communication cadence and content, learn how storytelling for specific audiences can remind donors why they connected with your organization, and implement digital plans that support growing a culture of philanthropy. With a digital strategy focused on relationship-building, turn one-time gift-givers into long-term, loyal supporters of your organization.

Education Track: Securing the Gift

Audience: Introductory/Foundational

Speakers

Jack Alotto, CFRE, MA

Fundraising Academy at National University - Trainer

Throughout his career, Jack Alotto, MA, CFRE has served in a variety of fundraising positions in hospital, social service and the arts as development director, major gift and legacy giving manager, and foundation and corporate relations manager. Jack has taught a variety of fundraising classes at the Center for Volunteer and Nonprofit Leadership and JFK University. Jack has served on panels in Strategic Planning, Ethics in Fundraising, Cause Selling and Donor Loyalty and Donor-Centered Fundraising.

LaShonda Williams, CFRE, MPA

South Texas College of Law Houston - South Texas College of Law, Assoc. Director of Alumni Engagement & Annual Giving and Trainer, Fundraising Academy

LaShonda Williams, MPA, CFRE, serves as a Trainer for Fundraising Academy, and recently joined the team at South Texas College of Law as the Associate Director of Alumni Engagement and Annual Giving, in the college's centennial year. Ms. Williams leads the charge of developing and implementing alumni engagement strategic planning and acquisition. With nearly two decades of experience in higher education, LaShonda's mission is to secure philanthropic support for students seeking economic empowerment through education.

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Mon, Apr 17, 2023

10:15am - 11:30am

Challenges and Opportunities: Trends and Innovations Impacting Fundraising Worldwide

Wake up to innovation in fundraising, donor engagement, artificial intelligence, and why channels and tools such as TikTok, Facebook, Google, LinkedIn, Instagram, Google, WhatsApp and many more digital channels and payment tools are now essential to your fundraising mix. Hear real success stories in a whirlwind tour of the planet. Eligible for 1.25 ACFRE credits in Leadership or Management

Education Track: Leadership and Management

Audience: Strategic

Speakers

Daryl Upsall, MA, MBA, FCIOF

Daryl Upsall International - President

With 38 years working with over 240 non-profits in 70 countries, Daryl is known for his leadership and innovation, pioneering digital fundraising co-creating face to face fundraising when leading Greenpeace's fundraising worldwide. President of Daryl Upsall International, Consulting & Recruitment and co-owner of Spain's leading telephone, digital and face to face fundraising agencies. He has spoken at conferences in 34 countries. Fellow of the UK Chartered Institute of Fundraising and former AFP Global Vice-Chair.

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Mon, Apr 17, 2023

10:15am - 11:30am

From Practice to Research to Practice (Sponsored by AFP Foundation for Philanthropy)

Join fundraisers turned AFP Foundation for Philanthropy award-winning scholars for a panel discussion about how their experiences and research both validate and challenge "best practices." Learn about their cutting-edge research - both recently published and in process. Your ideas and questions may inform future research projects! Eligible for 1.25 ACFRE credits in Leadership or Management

Education Track: Ethics, Accountability and Professionalism

Audience: Applied

Speakers

Ruth Hansen, PhD

University of Wisconsin-Whitewater - Assistant Professor

Ruth K. Hansen, Ph.D. is an assistant professor of nonprofit management at the University of Wisconsin-Whitewater. Her research focuses on the theory and practice of fundraising, and equity and inclusion in resource mobilization. Ruth has more than 20 years' professional experience as a fundraiser, and is a former board member of AFP-Chicago. She speaks regularly on the topics of fundraisers, fundraising, and related issues both nationally and internationally.

Lori Overmyer, CFRE, MBA

Goettler Associates - Vice President

Lori Hunter Overmyer, MBA, CFRE has more than twenty-five years of professional fund-raising experience with a focus on the arts, social, and human service organizations. Her professional expertise includes implementing annual and capital fund-raising plans, strategic analysis, major donor solicitation, and establishing development procedures to maximize effective operations and communications. She is skilled in marketing research, proposal writing, personal donor cultivation, recognition strategies and motivating board members to participate in the process. As Vice President at Goettler Associates, Inc., a nationally-known fundraising consulting firm headquartered in Columbus, Ohio, Lori offers a wealth of experience in the role of counsel. Since joining the firm in July 2005, clients have benefitted from her experience regarding board development, volunteer training and management, strategic planning, and fund raising metrics and methodologies.

Steven Fields

Vice President, Director, Corporate Community Affairs, President, The Huntington Foundation

As a member of Huntington's Community Affairs department for over 8 years, Steven has worked intimately with Huntington's Corporate Giving and Community Involvement programs. Recently, Steven was elected President of The Huntington Foundation, while also serving as the Director of Huntington's Corporate Community Affairs and Involvement program. He previously worked as a skills coach/trainer in the Customer Care and Centralized Reconcilements area of Huntington. Steven received a Bachelor of Animal Science degree from The Ohio State University, and a Master of Marketing and Communications degree from Franklin University.

Genevieve Shaker, PhD

Lilly Family School of Philanthropy IUPUI - Associate Professor

Genevieve G. Shaker, Ph.D., is associate professor of philanthropic studies and the Donald A. Cambell Chair in Fundraising Leadership at the Indiana University Lilly Family School of Philanthropy. Professor Shaker's research focuses on higher education advancement, the fundraising profession, and fundraising practice. She is the lead editor of "Achieving Excellence in Fundraising (5th edition)" published in 2022.

Dan Heist, CFRE, PhD

Brigham Young University - Assistant Professor

Dr. Heist is an Assistant Professor of Nonprofit Management at Brigham Young University. He earned a master's degree in Philanthropic Studies from the IU Lilly Family School of Philanthropy and a PhD in Social Welfare from the University of Pennsylvania. His research focuses on philanthropy and fundraising. His nine years of professional fundraising experience inform his research and teaching. He is a leading expert on donor-advised funds and co-founder of the Donor-Advised Fund Research Collaborative.

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Mon, Apr 17, 2023

10:15am - 11:30am

Leading Up: The Unique Influence of Fundraisers

The traits of successful leaders are similar to the traits of successful fundraisers who can use their unique expertise, skills, and abilities to lead within their nonprofit organizations - including leading up to the CEO and the board of directors to create a culture of philanthropy and maximize fundraising success. Eligible for 1.25 ACFRE credits in Leadership or Management

Education Track: Leadership and Management

Audience: Applied

Speakers

Bill Stanczykiewicz, Ed.D.

Indiana University Lilly Family School of Philanthropy - Senior Assistant Dean for External Relations

Bill Stanczykiewicz, Ed.D., serves as senior assistant dean for external relations at the Indiana University Lilly Family School of Philanthropy, where he directs The Fund Raising School. Bill's professional experience includes leading a youth development nonprofit for 17 years. His research expertise is in board engagement with fundraising.

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Mon, Apr 17, 2023

10:15am - 11:30am

Objection! How to Address Donors' Legacy Giving Concerns

Do you wish you could alleviate donors' deepest fears so they embrace the exciting possibility of making a transformational gift? You'll learn 5 common legacy giving concerns and build your own set of powerful messages to dissipate donor doubts and inspire them to make a gift in their will.

Education Track: Securing the Gift

Audience: Applied

Speakers

David Kravinchuk

The Common Good Fundraising - Philanthropy Firebrand

David firmly believes philanthropy's power belongs to everyone. He created The Common Good Fundraising Agency and the Western Canada Fundraising Conference to help charities empower donors-of-modest-means to express their values

-- and make the world a better place for all -- through philanthropy. David is an in-demand speaker who is regularly requested to share his unique, practical approach to fundraising at conferences and seminars across Canada and internationally.

Lynne Boardman

Harvey McKinnon Associate - Managing Director

Lynne Boardman has spent over 20 years creating successful individual giving programs for charities in both Canada and the UK. Her work has spanned health care, international development, human rights, education and environmental causes. She is currently the Managing Director of HMA, working with clients like Amnesty, Oxfam, Indspire, Covenant House, and a number of children's hospitals. She speaks, strategizes and writes about legacy fundraising whenever there is someone nearby to listen.

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Mon, Apr 17, 2023

10:15am - 11:30am

Activating an Equity-centered Development Department (Sponsored by Alford Group)

The imperative for Inclusion, Diversity, Equity, and Access in fundraising is well documented and accepted. Fundraisers play a leadership role in developing equity-centered practices that advance inclusion, ultimately creating more possibilities, for more people, to accomplish their organization's mission that makes a difference in the world. Many of us struggle, however, with the execution of IDEA practices. How do we operationalize principles? What does it mean to our daily work as fundraisers? Do our organizations have IDEA plans that work in conjunction with our development plans? And how do we measure results to know that our equity-centered development efforts are actually creating change? This interactive session will engage a panel of fundraisers and philanthropic leaders to answer these questions. You'll leave the discussion prepared to develop SMARTIE goals (strategic, measurable, ambitious, realistic, time-bound, inclusive, equitable) to more fully operationalize IDEA in your fundraising actions to advance transformational fundraising and relationships results. Alford Group is proud to sponsor the ICON2023 IDEA workshop. Join us to become an IDEA change agent. Eligible for 1.25 ACFRE credits in Leadership or Management

Education Track: Leadership and Management

Audience: Strategic

Speakers

Caroline Durham, JD

St. Charles Center for Faith + Action - Executive Director

Caroline brings thirty-plus years of justice advocacy to her role as Executive Director for the St Charles Center for Faith + Action. She comes to The Center from her role as Georgia Appleseed's Legal and Policy Director. In addition to serving as a public defender in state and federal courts for almost 30 years, she has extensive experience training advocates on how to effectively navigate criminal courts, and provide client-centered services.

Marc Barnes, PhD, CFRE

UNCF - Sr. Vice President, Principal Gifts & Strategic Impact Investment Fund, UNCF

Marc A. Barnes, Ph.D. serves as Senior Vice President, Principal Gifts and Strategic Impact Investment Fundraising at UNCF where he works directly with the President & CEO to strengthen financial support for strategic impact initiatives. In this capacity, he is responsible for strategic fundraising activities and leading a team to identify opportunities to broaden UNCF's philanthropic revenue. Most of Dr. Barnes' 23 year fundraising career has been dedicated to raising money for HBCUs.

Caitlin Scanlan

Reconcile New Orleans, Inc. | Café Reconcile - Chief Development Officer, Reconcile New Orleans, Inc.

Caitlin Scanlan is Chief Development Officer for Reconcile New Orleans (aka Café Reconcile). As a professional fundraiser for over 15 years, she has also served as Development Director at Volunteers of America and Habitat for Humanity affiliates. She is a proud Board Member for First Grace Community Alliance, New Orleans Vocal Artists (NOVA) and the Association of Fundraising Professionals Greater New Orleans and was the association's 2019 Outstanding Professional Fundraiser of the Year.

Alisha Johnson Perry, JD

Gulf Coast Community Foundation - Director of Donor Programs

Alisha Johnson Perry's first high school job was at a non-profit. Dual studies in Journalism and Spanish, a decade as a Louisiana Legislative Aide, a federal flood, and a law degree launched Alisha into her 16-year fundraising career: since 2007 she has helped raise over \$20 Million for immigrants rights and food justice through education and nutrition access. She is a Certified Fundraising Executive and is Director of Donor Programs for Gulf Coast Community Foundation.

Cory Sparks, PhD

Dillard University - Major Gift Officer

Cory Sparks is a major gifts officer at Dillard University, a historically Black liberal arts institution in New Orleans. Cory has twenty-five years of experience as a fundraiser, community organizer, and organizational development consultant. He is a past president of the New Orleans chapter. An ordained United Methodist minister, Cory holds an A.B. from Columbia University, an M.Div. from Southern Methodist University, and a Doctorate in American History from Louisiana State University.

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Mon, Apr 17, 2023

10:45am - 11:15am

What is Good Marketing? A Primer with Feathr (Learning Lab)

Looking to unlock more from your marketing? Join us to discover how Feathr helps you run highly targeted campaigns across multiple digital channels, analyze data, and optimize results in real-time. You'll see first hand examples from other nonprofits on how Feathr's Good Marketing Platform helps them increase engagement, drive conversions, and generate more revenue.

Speakers

Brittany Clifton

Britany Clifton is a Senior Account Director at Feathr, where she consults with nonprofits on impactful ways to do their best digital marketing to fuel their missions. For 14 years, Britany's focus has been fundraising events. She has planned & marketed 100s of events. She's been a Board Member of Stop Children's Cancer & Co-Chair of their 2000-person gala.

Noah Barnett, PhD

Feathr - VP of Feathr

Noah Barnett is a veteran nonprofit fundraising and marketing professional. Currently, he serves as the VP of Marketing at Feathr, the digital marketing platform built to help nonprofits create more engaging digital experiences and expand their impact. Previously, Noah spent over a decade in nonprofit fundraising and marketing leadership roles, most recently as the CMO at Virtuous, and previously at CauseVox, World Help, HubSpot, and The Adventure Project.

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Mon, Apr 17, 2023

10:45am - 11:15am

Elevate Your Fundraising Strategy with Career Intelligence (Learning Lab)

In today's fundraising landscape, employment attributes like job title, job level, and current company have emerged as essential tools for development teams. Through this "career intelligence," your organization can stay on top of key changes, such as when a donor is promoted to a C-Suite position, or a prospect is a "rising star" in their field.

Speakers

Marissa Maybee, MBA

Marissa Maybee is the Director of Nonprofit Customer Success at Windfall. She leads a dynamic team that helps Windfall customers leverage their constituent intelligence to drive fundraising outcomes. Marissa has more than a decade of experience working at the intersection of nonprofits and data strategy and holds an MBA from Georgetown University.

Kyle Curry

Kyle Curry is the Senior Director of Nonprofit Sales at Windfall, where he supports all sizes of nonprofit organizations as they explore wealth screening, AI propensity modeling and marketing lead generation. He has been working for and with

nonprofits since 2006, as a fundraiser, event director, board member, and consultative sales leader with a speciality in technology, digital strategy, and data.

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Mon, Apr 17, 2023

11:30am - 12:00pm

The Nonprofit Technology Reckoning: How We've Sacrificed Relationships In Favor of Efficiency (Learning Lab)

The philanthropic landscape has been revolutionized by the rise of new technology in the last 20 years. While tech developments in the nonprofit sector have helped fundraisers increase the volume of community communications and connections, there have also been unintended consequences. This session will explore the ways in which technology has transformed the nonprofit sector for better and for worse, and how nonprofits and technology providers can work together to chart a course forward.

Speakers

Adam Miller

Adam Miller is a social entrepreneur dedicated to driving impact at the intersection of technology and philanthropy. With his first company, Cornerstone OnDemand, Adam helped over 75 million people worldwide access education. Adam has founded, led, and serves as board member or major donor for over a dozen nonprofits. Today, as CEO of Instil, Adam continues to use technology to help nonprofits magnify their impact through strong community relationships.

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Mon, Apr 17, 2023

11:30am - 12:00pm

Experience bi-directional data integration between Salesforce Marketing Cloud and your CRM using Omatic (Learning Lab)

Learn how Salesforce and Omatic allow routine synchronization with your existing CRM and Salesforce Marketing Cloud. Nonprofits are using this technology to drive digital transformation which keeps all key data in both systems current and clean.

Speakers

Margo Dayal

Margo Dayal helps nonprofits engage with their constituents in more personalized and scalable ways as a Lead Solution Engineer at Salesforce. With more than two decades of experience in nonprofit technology, Margo brings intimate knowledge and understanding of nonprofit technology challenges and opportunities. Before joining Salesforce, Margo led digital strategy and analytics at the V Foundation for Cancer Research. Margo's expertise lies in integrated marketing and communications strategy, contact management, and marketing analytics.

Geoff Sharbrough

Omatic Software - Senior Enablement Engineer

Geoff has worked in the non-profit software industry for over 15 years with both fundraising and financial applications. Currently he is a Senior Sales Enablement Engineer and helps clients with systems integration(s) across several CRM systems and satellite applications. He is a member of the Charleston Chapter of the Surfrider Foundation.

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Mon, Apr 17, 2023

12:15pm - 12:45pm

How to Maximize Donor Potential (Learning Lab )

Discover how to maximize the lifetime value of your supporters through various campaign types. Learn about the essential elements of an effective stewardship strategy and how an all-in-one fundraising solution can unlock valuable donor insights. Gain practical knowledge on engagement strategies such as nurturing first-time supporters into repeat donors and engaging your recurring supporters at your next fundraising event. Our expert team will also discuss how to identify and cultivate your next generation of peer-to-peer fundraising leaders. Don't miss this opportunity to gain strategic insights and tools to increase the lifetime impact of your supporters.

Speakers

Elizabeth Ruikka

## Classy - Senior Director, Demand Generation

Elizabeth is a strategic marketing leader with a decade of expertise across digital and owned marketing channels. Passionate about staying up to date with the ever-changing digital landscape, Elizabeth enjoys advising nonprofits on how to maximize the impact of their online fundraising strategy. During her tenure at Classy, she has developed strong understanding of the unique challenges nonprofits face and is invested in their success.

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Mon, Apr 17, 2023

12:15pm - 12:45pm

### Markers of Philanthropy & Leveraging AI to Find Your Best Prospects (Learning Lab)

Traditional methods of connecting with your prospects have gotten us this far. But how can we do better and be more effective? What practices should we keep moving forward, and what practices should we add to our processes? In this session, attendees will walk away understanding the 6 key markers of philanthropy and how Artificial Intelligence can assist with your organization's prospecting needs. AI models are now readily available to identify those who are most likely to make a gift based on similarities to other donors. Learn the differences between AI modeling and the more traditional predictive models.

#### Speakers

Sarah Tedesco

DonorSearch - Executive Vice President

Sarah serves as the Executive Vice President at DonorSearch and helps direct operations, client success, and marketing. For the past 15 years, Sarah has enjoyed working with nonprofits of all shapes and sizes while assisting them to achieve their fundraising success. Sarah truly enjoys working on strategic plans, product development ideas, and collaborating with DonorSearch clients and partners. In addition, speaking at conferences and engaging with others in the industry is something Sarah regularly does.

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Mon, Apr 17, 2023

1:00pm - 1:30pm

### Donor Engagement: A Donor-Centric Approach to Fundraising (Learning Lab)

Is it time for a new fundraising strategy for your organization? In this lesson we'll breakdown a unique approach to develop your relationships with your donors by using data from your CRM to make informed strategic plans. The Donor Engagement Cycle concept puts your donor at the center of your fundraising strategy.

#### Speakers

Kimberly Perron, MBA

Kimberly is a Customer Success Instructor providing training and course development for DonorView software. She has over 15 years of experience working in administration and fundraising for a variety of non-profits supporting environmental, arts, and social service causes.

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Mon, Apr 17, 2023

1:00pm - 1:15pm

### Integrating Online Wills in your Legacy Offer (Learning Lab)

Donors are tech savvy than you might think and not all want paper. In this power session, learn a few do's and don'ts to make your online will writing offer succeed.

#### Speakers

Ligia Pena, CFRE

GlobetrottingFundraiser - International Legacy Consultant

Ligia is an international legacy expert, consultant and speaker with over 20 years of experience in the nonprofit sector. She is also pursuing a PhD at the University of Kent, researching national legacy marketing campaigns in the UK, Canada and Australia. She strives to share her passion for legacies with new and seasoned fundraising professionals.

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Mon, Apr 17, 2023

1:15pm - 2:30pm

## Racial Equity in the Fundraising Profession

Racial Equity in the Fundraising Profession will begin with my personal story of being the only Female of Color in my AFP Chapter and in my nonprofit organizations and how my commitment to mission and community supported me in overcoming professional racial equity challenges.

Education Track: Leadership and Management

Audience: Introductory/Foundational

### Speakers

Linh Nguyen, BA

Lumina Foundation - Vice President for Equity, Culture, and Talent

Linh leads racial equity efforts for Lumina Foundation, a private foundation in Indianapolis committed to making opportunities for learning beyond high school available to all. He works to embed equity in Lumina's grantmaking and operations and nurtures the foundation's culture to increase diversity, improve inclusion, and eliminate racial disparities. A recognized leader in impact strategy and organizational development, Linh previously served as chief operating officer at the W.K. Kellogg Foundation in Battle Creek, Mich.

Ernest Lewis, MBA

BakerRipley - Senior Director, Economic Initiatives

Ernest Lewis III has a diverse background in the areas of management, fund development, media, literacy, arts administration, and community development. Ernest has acquired varied experience in developing and shaping signature programming focusing on basic needs, disaster recovery, youth development, adult and family literacy, workforce development, and art education. Ernest served as President and CEO of the Adult Education Center in Pearland, TX until early 2022 and is currently Senior Director, Economic Initiatives at BakerRipley.

Kenneth St. Charles, MBA, PhD

Dr. Kenneth St. Charles currently serves as the Vice President for Philanthropy of the Greater New Orleans Foundation. An accomplished fundraiser primarily in the nonprofit, higher education, and secondary education arenas, he has personally raised more than \$160 million over his 30-year fundraising career. He most recently served as President/CEO of St. Augustine High School in New Orleans from 2016 – 2021.

Germaine Mitchell

DreamSpring formerly Accion - Business Partner and Government Relations Specialist

Germaine Mitchell has thirty years experience as a professional nonprofit fundraiser. Her fundraising career began in her home town of New Orleans. She served as the Director of Development for the Coalition to Restore Coastal Louisiana, Father Flanagan's Boys Town, The Little Sisters of the Poor and the YMCA's Educational Services. In 2015, Germaine relocated to Albuquerque, New Mexico to support their nonprofit organizations and community collaborative efforts.

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Mon, Apr 17, 2023

1:15pm - 2:30pm

Manage Up! Techniques for Driving Cross-Team Efficiency in Grant Seeking

Master how to manage up! Learn techniques to drive cross-team accountability, manage timelines and expectations, and host productive meetings for stronger, more successful grant proposals.

Education Track: Leadership and Management

Audience: Strategic

### Speakers

Kelly Howard

Grants Plus - Senior Advisor

As a Senior Advisor at Grants Plus, Kelly works with a portfolio of nonprofit clients from across the country to write and advise on high-quality grant proposals, research potential funding sources, and guide grant-seeking strategies. Kelly is a member of the St. Louis Regional GPA Chapter, for which she served as a board member from 2017-2022, and currently serves on the membership/marketing and chapter conference committees.

Abby Teare, MA

Grants Plus - Senior Advisor of Strategy

Abby has an extensive track record of winning grants from private, corporate, and government funders from across the country, with her largest awarded grant totaling more than six million dollars. Having served as both a grants manager and strategic advisor, Abby has unique expertise in managing the proposal development process across large, diverse teams while also leveraging her experience as a grants consultant to ensure organizations implement a smart and successful grant seeking strategy.

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Mon, Apr 17, 2023

1:15pm - 2:30pm

Allyship and Accessibility in the Disability Sector - Mistakes Made, Lessons Learned and Best Practices

How accessible is your own day-to-day work to coworkers, clients or volunteers with disabilities? Through interviews with stakeholders and colleagues with disabilities, learn from common mistakes, successes achieved and tactics derived from best practices to make your fundraising office more accessible.

Education Track: Ethics, Accountability and Professionalism

Audience: Applied

Speakers

Kirk Laughlin, CFRE, MNPL (Master of Nonprofit Leadership)

Planet Laughlin - Principal

Kirk has been a fundraiser in the Seattle area since 1994 and has worked as an ally and fundraiser for people with disabilities for over 12 years. He has led fundraising for organizations serving neurodiverse youth and serves as a board member and advisor for the largest employer of individuals who are blind, Deaf-Blind & blind with other disabilities in the country.

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Mon, Apr 17, 2023

1:15pm - 2:30pm

Are You a Buffalo or a Cow? Lessons in Turning Adversity into Trust

Cows and buffalo have different approaches to surviving storms. It's a great metaphor for fundraising professionals. It's how we respond to the storm that makes all the difference with our donors, board members, and your team.

Education Track: Relationship Building

Audience: Applied

Speakers

Tammy Zonker, AFP Master Trainer, CFRM

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

Tammy is a fundraising strategist, AFP Master Trainer, and an inspiring international speaker. In the past 20 years, she has coached, trained, and led nonprofit teams to raise more than a half-billion dollars including a single gift of \$27.1M.

Tammy is certified in Philanthropic Psychology through the Institute for Sustainable Philanthropy, and Fundraising Management through the Lilly Family School of Philanthropy at Indiana University.

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Mon, Apr 17, 2023

1:15pm - 2:30pm

The Unexpected Failure of Traditional Recognition in Social Media Fundraising – Why It Won't Work

Part of your new job (even if in an old seat) is understanding how old tools work in newly important virtual environments. Otis Fulton and Katrina VanHuss help you understand why your investment in recognition in the virtual environment may be useless.

Education Track: Securing the Gift

Audience: Strategic

Speakers

Katrina VanHuss

Turnkey - CEO & Founder

Since 1989, Katrina has led Turnkey as CEO, serving the likes of the American Cancer Society, Leukemia & Lymphoma Society, and the Alzheimer's Association. With her husband, Otis Fulton, she presents at national conferences for the likes of Blackbaud, Peer-to-Peer Professional Forum, and Nonprofit Power, and at clients' national meetings. Katrina contributes to NonProfit PRO on the "Peeling the Onion" blog. With Otis, she authored the 2017 book?Dollar Dash – the Behavioral Economics of Peer-to-Peer Fundraising.

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Mon, Apr 17, 2023

1:15pm - 2:30pm

Start Your Plan Here: Implementing a Big-League Relationship Management Program for Your Small Shop

Luck is where preparation meets opportunity. In this interactive session, you will learn how to implement (or strengthen) your ability to systematically manage your relationships with your top donors and be prepared to raise major gifts for your organization.

Education Track: Leadership and Management

Audience: Strategic

Speakers

Timothy Dougherty, MPA

Silver Hill Hospital - Chief Advancement Officer

Timothy J. Dougherty has over 30 years of experience in philanthropy. Tim currently serves as CAO for Silver Hill Hospital in New Canaan, CT. He has served in fundraising leadership roles for the Interlochen Center for the Arts, United World Colleges (in the USA and Costa Rica), Cornell University, Habitat for Humanity International and the Boys and Girls Clubs of Metro Denver. Tim earned his MPA at Syracuse University and his BS from Cornell University.

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Mon, Apr 17, 2023

1:15pm - 2:30pm

Belonging and Exclusion: Creating Space for Growing LGBTQ Donors

1 in 6 Gen Z adults are LGBT. And this number could continue to grow. For a community that continues to fight for acknowledgment and acceptance, the tools for cultivation, research, and "best practices" fail. We hope to scaffold your organization's equity journey by offering actionable insights for inclusive change.

Education Track: Leadership and Management

Audience: Strategic

Speakers

Dominic M Pepper, CFRE, MA, M Ed

CCS Fundraising - Senior Vice President

Dominic Pepper is a Senior Vice President at CCS. He leads work across networked nonprofits, human services organizations, and global NGOs. He co-chairs CCS' subject matter expert group on Gift Planning, launched Pride @CCS, and is a member for CCS's thought leadership initiative: Elevate. Prior to CCS, Dominic advised family office philanthropy with STEP's the finalist for International Boutique Firm of the Year. Dominic received a BA and M.Ed. from the University of Notre Dame.

Leah Munnelly

CCS Fundraising - Assistant Vice President

Leah Munnelly is an Assistant Vice President at CCS. Since joining CCS, she has worked within a wide range of nonprofit sectors and has extensive experience serving as interim management. Leah is well-versed in onboarding new development leadership, planning and managing large campaigns, developing leadership and major gift fundraising strategies, building annual giving and donor acquisition plans, and supporting fundraising teams by improving and implementing development processes.

Renee Colombo

The Lesbian, Gay, Bisexual & Transgender Community Center - Chief Development Officer

Renee Colombo is the Chief Development Officer at The Lesbian, Gay, Bisexual & Transgender Center in New York City. Renee has 20+ years of experience at the senior leadership for HIV/AIDS advocacy and service organizations as well as

national and local K-12 educational organizations. Her experience has focused on fund development, strategic planning, board relations and communication areas.

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Mon, Apr 17, 2023

1:15pm - 2:30pm

Fostering a Culture of Gender Inclusion in Fundraising and Nonprofit Spaces

By building awareness about how gender bias appears in nonprofits we can move from knowledge to action in order to create more equitable and safe spaces for nonprofit workers and their organizations.

Education Track: Leadership and Management

Audience: Strategic

Speakers

Saadia Ahmed

GEM Advisors and Texas Muslim Women's Foundation - Executive Director and Youth Leadership Director

Saadia graduated in International Studies from Austin College where she intensified her commitment to serving the community. She is a community and thought leader in Dallas/Fort Worth in addition to being the founder and adviser to numerous nonprofit and community initiatives. Saadia's areas of expertise include youth development program development, advocacy, community building, event planning, social media optimization, individual major giving, DEI training, and annual fund development. Saadia is fluent in English and Bengali. She

Jason Brooks

Harkness.ai - Founder, CEO

Jason is the founder of Harkness.ai, the FitBit for virtual meetings that reveals how unconscious bias and individual interactions affect meeting dynamics. He has a BA from Trinity University in Spanish, an MA in Mandarin Chinese from Valparaiso University, a member of FourthBrain's Machine Learning cohort, and an MA in Education from Harvard University Graduate School of Education. In addition to his work with Harkness, Jason is a Spanish teacher at Marantha High School.

Rachel Branaman, MA

Talem Consulting - Principal

Rachel Branaman, principal consultant for Talem Consulting, has a Master's in nonprofit management from Regis University. She worked in fundraising and executive director roles at organizations like Alley's House, Dallas Black Dance Theatre, Dallas Symphony Orchestra, and the Jewish Community Center of Dallas. As a consultant, Rachel uses an intersectional and equity-based framework to support organizational capacity building by working with organizations that serve communities of color, immigrants, refugees, religious minorities, and other impacted communities.

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Mon, Apr 17, 2023

1:15pm - 2:30pm

Philanthropic Justice: Loving Humanity in Its Fullness

In its purest form, "philanthropy" means love of humanity. "Philos" means love; "Anthropos" means mankind or humanity. Love, bell hooks reminds us, is a combination of care, commitment, knowledge, responsibility, respect, trust, justice, and equity. Do your philanthropic efforts demonstrate your organization's love for ALL of humanity? What might it mean to practice philanthropic justice in the face of egregious and blatant injustice? This session brings together a panel of experts and philanthropic practitioners working in the deep South to advance equity, and justice, and uplift the human spirit through our collective work—a deep and abiding love for all humanity. We will discuss philanthropy's role in catalyzing and fueling social justice movements, and the principles of philanthropic justice and answer your questions regarding how you and your organizations can begin to engage in the transformative work of doing philanthropic justice.

Education Track: Relationship Building

Audience: Introductory/Foundational

Speakers

Halima Leak Francis, PhD

Dr. Halima Leak Francis (she/her), Program Director of Tulane University School of Professional Advancement, is a nationally accomplished educator, practitioner, and scholar whose career spanning more than 20 years has focused on strengthening capacity, sustainability, and equitable practices within nonprofits, philanthropy, and higher education administration. She joined Tulane SoPA in 2019 to lead the development of the school's Public Administration program.

Peter Davis, MA

Southwise Consulting - CEO

Peter Davis is CEO and Principal at Southwise Consulting where he offers business strategy, communications and fundraising services. As a nonprofit leader in the Greater New Orleans area, he has worked to build strategic initiatives and cultivate relationships with individual and corporate philanthropic partners for various organizations including Jericho Road, New Orleans Youth Alliance and OPEN New Orleans. Peter earned his graduate degree from Northwestern University in Organizational Leadership and Nonprofit Management and his Bachelor's

David Robinson-Morris, PhD

The REImaginelution, LLC

Dr. David Robinson-Morris is an author, philosopher, social justice and human rights advocate-activist, educator, philanthropist, community organizer, DEI practitioner, and administrator. Dr. Robinson-Morris is the Founder & Chief Reimaginationist at The REImaginelution, LLC, a strategic consulting firm working at the intersections of imagination, policy, practice, and prophetic hope to radically reimagine diversity, equity, and inclusion (DEI) toward racial justice and systemic transformation by engendering freedom of the human spirit; and catalyzing the power of the

Chantelle Pierre, MSW

Chantelle Pierre Consulting

Chantelle Pierre brings over 25 years of experience in education and nonprofit leadership to strengthen communities. She is the founder of Chantelle Pierre Consulting, which offers fundraising and leadership development services that promote racial equity within organizations. A go-to strategist for organizations experiencing leadership transitions, she has led teams to produce goal-shattering results. She has raised seven-figure, multi-year gifts used to resource historically excluded, Black-led grassroots organizations and educational institutions serving vulnerable populations.

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Mon, Apr 17, 2023

1:15pm - 2:30pm

New Donors, Demographics & Opportunities: Reimagining Donor Engagement in the Post Pandemic World

See the latest trends, research and insights driving our understanding of the emerging motivations and needs of donors today! Understand and apply how these insights enable us to build strategic journeys that inspire, with examples from USA for UNHCR's community partnership program that is delivering real growth!

Education Track: Current and Prospective Donor Research

Audience: Strategic

Speakers

Kimberley Blease

Blakely - Executive Vice President, Strategic Solutions and Consultancy

When it comes to building high-value donor relationships, Kimberley's original thinking is unparalleled. With over 35 years of experience Kimberley is a fundraiser and marketer who helps not-for-profit organizations raise the bar on the experience their donors receive. As EVP Strategic Solutions & Consulting at Blakely Inc. she brings vision and proven strategy to her clients and to the teams she leads. Kimberley is an active mentor with AFP & Tony Elischer Foundation.

Rachel Hunnybun

Blakely Inc. - Director, Strategic Solutions

Rachel is a fundraising professional with over a decade of experience working for UK charities in Individual Giving & Supporter Experience. Through her role at Blakely Inc. she now works with US and Canadian charities and is passionate about helping charities deliver a great donor experience. She speaks internationally, served as a commissioner for the UK's Commission on Donor Experience and is an active member of the institute of fundraising.

Lacey Stone, MA

USA for UNHCR - Senior Director of Partnerships

Lacey's experience includes more than 15 years as a development and strategic partnerships professional. She has worked with both nonprofit and corporate organizations to increase funding and awareness and to develop and grow strategic partnerships. Currently, Lacey serves as Senior Director of Partnerships with USA for UNHCR, focused on bringing new, private sector corporate, foundation, civil society, and community partners to the organization, and managing complex relationships that provide a range of support and resources.

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Mon, Apr 17, 2023

1:15pm - 2:30pm

Making the Ask Authentically

Knowing how to make an ask is a fundamental tool that many fundraisers lack confidence and experience in, leaving us distracted by gimmicks, events and 'yet another' campaign. In this session you will get practical tips for an ask, and practice your ask, while eliminating fears along the way.

Education Track: Relationship Building

Audience: Introductory/Foundational

Speakers

Leya Petrovani Miller, BA

Aperio Philanthropy - Senior Director, Client Services

Leya Petrovani Miller is a career fundraiser experienced in building new revenue strategies, talent development, capacity-building, and community-centric fundraising. At Aperio, Leya partners with nonprofits on strategic growth initiatives, including building major gifts programs and advancing growth and capital campaigns. Prior to joining Aperio, Leya led middle- and major- giving efforts at The Bowery Mission as a Senior Development Officer. Previously, she served as a fundraiser for The Ethical Culture Fieldston School and Wheaton College.

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Mon, Apr 17, 2023

1:15pm - 2:30pm

Interested in the ACFRE Credential?

Are you interested in applying for the Advanced Certified Fundraising Executive certification? This lively and informative session will explain the ACFRE process and provide an opportunity for you to ask questions of ACFRE Certification Board members.

Education Track: Leadership and Management

Audience: Introductory/Foundational

Speakers

Leah Eustace, ACFRE

Leah Eustace, ACFRE, is President and Head Paddler at Blue Canoe Philanthropy, where she specializes in fundraising strategy, coaching, cases for support, and storytelling. She's also a member of The Case Writers, a small group of writers and designers who work with some of North America's most impactful nonprofits. Leah is the Past Chair of the ACFRE Credentialing Board, an AFP Master Trainer, a Stability Leader and holds a Certificate in Philanthropic Psychology (Distinction).

William Bartolini, ACFRE, PhD

An AFP Master Fundraising Teacher, coach, and counselor in philanthropy, Bill Bartolini (PhD, ACFRE) has been a professional fundraiser for 40 years, recently retiring from Ohio State where he solicited gifts of \$5M+. He's worked for several universities, including George Washington, Northeastern, Kent State, Ball State, and a variety of nonprofits. Bill's PhD dissertation at Kent State asked, "What do People Think and Feel when You Ask them for Money?"

Alphonse J. Brown, ACFRE

Alphonse J. Brown, Jr is the principal consultant for Docere Consulting, Inc.—a company he founded in July 2003. The company's mission is to teach its clients how to achieve sustainability using new technology and proven fundraising methods through the use of annual fund, capital campaigns, special events and major donor solicitation. Alphonse is a

graduate of The University of Texas at Austin, an Advanced Certified Fundraising Executive (ACFRE), and an AFP Master Trainer.

Audrey Kintzi, ACFRE

Audrey is the Vice President, Emerita for Advancement and the Executive Director of the M. A. in Philanthropy and Development Program at Saint Mary's University of Minnesota. Ms. Kintzi has been working in the development field for over 35 years and is a certified AFP Master Trainer and holds a Certificate in Philanthropic Psychology (with Distinction) from the Institute for Sustainable Philanthropy.

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Mon, Apr 17, 2023

1:15pm - 1:30pm

Supporting Your Mission with LinkedIn (Learning Lab)

For many organizations, LinkedIn is underutilized when compared to some flashier socials yet it is the one that could have great impact on your organization. A quick look at three things LinkedIn can do to help your organization and three cautions to be aware of.

Speakers

R. Scott Fortnum

Children's Health Foundation - President & CEO

Scott is President & CEO of Children's Health Foundation in London, Ontario and has been a fundraiser since 1990 with major organizations across Canada. A frequent speaker on leadership and ethics Scott has an MA in Philanthropy and Development Graduate Business Diploma from Wilfrid Laurier University. A CFRE from 1995-2022 and in 2011 became the 92nd person to earn the ACFRE. Scott is a Certified Healthcare Executive (CHE) and holds the ICD.D.

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Mon, Apr 17, 2023

1:15pm - 2:30pm

Elevating Your Organization's Vision

In this interactive presentation, participants will learn the keys to crafting a compelling vision and aligning this with donors' passions to drive meaningful philanthropy. Through expert perspectives on elevating the vision so that it resonates with donors, participants will gain insights into how they can help their organizations tell an inspiring story.

Education Track: Leadership and Management

Audience: Applied

Speakers

Mark McCampbell

Advancement Resources - Senior Vice President

With over 4 decades of experience in a wide range of development leadership positions, Mark has worked with leaders in healthcare, higher education, arts, human services, and faith-based institutions to help organizations prepare and take steps towards the next level of growth. He is active in various fundraising professional organizations, community nonprofits, and boards.

Anamaria Repetti

UT Health San Antonio - Vice President for Development and CDO

Anamaria Repetti is Vice President and Chief Development Officer at UT Health San Antonio. Anamaria has more than 25 years of experience in healthcare and higher education fundraising, most recently serving as the Managing Senior Executive Director of Development at UC San Diego, where she developed and implemented a national fundraising program in support of UCSD's recently completed \$3 Billion Campaign for UC San Diego, including recruiting and managing a 50-member national campaign cabinet.

Shade Mokuolu, CFRE

Providence Southern California - Major Gifts Officer

Shade Mokuolu is a Major Gifts Officer with Providence Health and Human Services since May 2021. She connects physicians and clinicians to the funding needs of the medical center and deepen their engagement with the foundation

to increase grateful patient referrals. With over a decade combined experience as a Development Director at the Arthritis Foundation and New Horizons, SFV, she consistently builds mission advocates and amplifiers while generating funds.

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Mon, Apr 17, 2023

1:15pm - 2:30pm

Subscription GivingSM - A New Revenue Stream to Your Fundraising Strategy (Presented by Bonterra)

Acquiring new donors can be an expensive proposition, even for the most resource-rich nonprofits. In this session, nonprofits will learn how to create and manage sustaining donor programs with Subscription GivingSM—a modern twist on repeat and recurring contributions.

Education Track: Securing the Gift

Audience: Introductory/Foundational

Speakers

Kimberly O'Donnell, CFRE, MA, ACC

Bonterra - Chief Fundraising and Engagement Officer

Kimberly is a seasoned nonprofit tech leader. Having worked as an executive director, chief philanthropy officer, fundraising consultant, and tech advisor, she has spent 25+ years blending fundraising and marketing principles to scale dollars raised and strengthen supporter engagement. She was an adjunct professor for 11 years at Georgetown and George Mason Universities where she taught nonprofit leadership. A certified executive coach, Kimberly currently leads Bonterra's coaching program and hosts the popular Accidental Fundraiser podcast.

Kate Ayers

ReEstablish Richmond - Executive Director

Kate joined ReEstablish Richmond in 2013. She previously worked as a special education teacher for 11 years, while also serving as a volunteer mentor for refugees in the Richmond community. Kate is currently the Chair of the Office of New Americans Advisory Board, and her dedicated efforts continue to build a supportive, trustworthy community for refugees and new immigrants living in Richmond.

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Mon, Apr 17, 2023

1:15pm - 2:30pm

Donor Magnetism: How to Create Messages that Attract and Retain Donors (Presented by DonorPerfect)

This session will explore effective communication strategies for capturing donors' attention and cutting through the noise in today's crowded and competitive fundraising landscape. Attendees will learn how to craft compelling messages that resonate with donors, using persuasive storytelling and emotionally engaging imagery. A key focus of this session will be on understanding the impact of storytelling on donor engagement and how storytelling is strengthened with the use of donor personas. Attendees will walk away from this session understanding their organization's unique donor personas and how to create messages that stand out in order to increase donor engagement and drive impact for their organization.

Education Track: Relationship Building

Audience: Applied

Speakers

Julia Gauckebach

Julia Gackenbach has spent over a decade working locally and globally with nonprofits. This has sharpened her skills to raise funds, care for donors and communicate impact. Her experience tied in with her desire to create community through a mission gives her unique passion to work with all types of organizations. Julia now uses that enthusiasm and expertise to lead communication strategies from DonorPerfect to industry practitioners.

Mallory Erickson

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

Mallory Erickson is an executive coach, fundraising consultant, and host of the podcast What the Fundraising, aimed at supporting nonprofit leaders to fundamentally change the way they lead and fundraise. Through her signature framework, the Power Partners Formula™, Mallory provides unique tools to help nonprofits fundraise more from

foundations, corporate partners, and individuals. As of 2022, she had trained over 60,000 fundraisers using her unique win-win framework.

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Mon, Apr 17, 2023

1:15pm - 2:30pm

Building Bridges: How to Engage Your Supporters with Peer-to-Peer Fundraising (Presented by Qgiv)

Over the last three years you had to learn how to go virtual almost overnight and then had to navigate hybrid event experiences on top of your never-ending to do list. Donor expectations have changed, and different generations are looking to engage with your organization in new ways. Events and the way you connect with donors have been forever changed. Your donors want truly engaging opportunities and more meaningful connections where they feel they are a part of your mission, making a significant and direct impact. Peer-to-peer fundraising can help deliver that empowering experience to your supporters in innovative and exciting ways. All while bridging the gap, connecting donors directly to the crucial funds your organization needs to thrive.

Education Track: Securing the Gift

Audience: Applied

Speakers

Wendy Mercurio

Qgiv - Content and Education Specialist

Wendy Mercurio is the Content and Education Specialist at Qgiv. As a former Development Officer and Development Director, Wendy draws upon her nonprofit experience to create informative and inspiring content for the Qgiv audience and beyond. Wendy's professional efforts have focused on fundraising events, corporate relations, donor acquisition, and donor relations.

David Hawa

Islamic Relief USA - Director of Marketing and Communications

David Hawa is a communications professional with more than 25 years of experience in advertising, marketing, project management, video production, graphic design, public relations, and web design. He holds a communications degree from George Mason University and is certified in fundraising management (CFRM) from the Lilly School of Philanthropy, Indiana University.

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Mon, Apr 17, 2023

1:15pm - 2:30pm

Cultivating Fundraisers: Innovative Approaches for Building Your Team

Talented and skilled fundraisers are in more demand than ever. This workshop provides research-based tools to use when cultivating fundraisers from recruitment and screening to interviewing and selection, including from a diversity, equity, inclusion, and justice perspective. Join with peers and researchers to bring creative approaches to this essential activity. Eligible for 1.25 ACFRE credits in Leadership or Management

Education Track: Leadership and Management

Audience: Applied

Speakers

Sarah Nathan, PhD

Middletown Community Foundation - Executive Director

Sarah K. Nathan, Ph.D. is a self-described "pracademic" who has spent her entire career in the nonprofit sector as a fundraiser, educator, volunteer, and leader. Today she leads the Middletown Community Foundation in Ohio. Dr. Nathan served five years as the Associate Director of The Fund Raising School where she managed all aspects of the curriculum designed for fundraising practitioners. She is a proud graduate of the IU Lilly Family School of Philanthropy.

Genevieve Shaker, PhD

Lilly Family School of Philanthropy IUPUI - Associate Professor

Genevieve G. Shaker, Ph.D., is associate professor of philanthropic studies and the Donald A. Cambell Chair in Fundraising Leadership at the Indiana University Lilly Family School of Philanthropy. Professor Shaker's research focuses on higher

education advancement, the fundraising profession, and fundraising practice. She is the lead editor of "Achieving Excellence in Fundraising (5th edition)" published in 2022.

Joyce Rogers, JD

Indiana University Foundation - Executive Vice President

Joyce Q. Rogers, J.D., is EVP for Development at the Indiana University Foundation (IUF). Joyce is responsible for providing strategic oversight of the development function to uphold IUF's mission of maximizing private support for Indiana University (IU). Joyce, an IU alumna, also served as VP, working closely with the Office of Diversity, Equity, and Multi-cultural Affairs. Prior to this, Joyce served in senior leadership roles at Ivy Tech Community College and Indiana Black Expo, Inc.

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Mon, Apr 17, 2023

1:45pm - 2:15pm

Best Practices for Retention and Acquisition Using Direct Marketing, Strategy, & Analytics (Learning Lab)

With over 17 years of experience in direct marketing and data analytics, Chad will share his experience with trends and best practices focusing on using donor lifecycle, segmentation, propensity scoring, and analytics to guide fundraising efforts that highlight acquisition and retention.

Speakers

Chad Carpenter

Teuteberg Incorporated - Vice President of Sales

Chad Carpenter is the Vice President at Teuteberg Inc. and has 20 years of experience in donor development. His expertise lies in developing strategies to grow donor databases. Utilizing data segmentation and analytics to guide decisions is at the core of ensuring successful campaigns. Chad has a passion for non-profits and enjoys using his skills to make a difference.

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Mon, Apr 17, 2023

2:30pm - 3:00pm

How to Maximize Giving Day Success (Learning Lab)

Launching or Amplifying a Giving Day can be challenging. To reach your audience, break through the noise of competition, and truly excite donors, you need to coordinate your message, channels and peer volunteers to have maximum impact. From direct mail, email communications to texting and social media, your coordinated strategy is key. Hear what we've learned from over \$500M in Giving Days, and the key steps you need to break records on your special day.

Speakers

Greta Daniels, CFRE

Ruffalo Noel Levitz - Senior Vice President

Greta Daniels is a fundraising professional with more than fifteen years of experience in philanthropy. She has extensive expertise in donor engagement strategies, university advancement and development, and annual giving. In her current role, she works with universities, hospitals and non-profit orgs of all shapes and sizes to maximize donor giving through data-driven omnichannel campaigns that meet immediate fundraising goals while also increasing long-term donor pipeline.

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Mon, Apr 17, 2023

2:30pm - 3:00pm

The Future of Fundraising Events: How to Raise More and Stress Less in 2023 (Learning Lab)

Givebutter's Director of Community & Partnerships Floyd Jones dives into key strategies for nonprofits seeking to raise more with fundraising events, whether in-person, fully virtual, or hybrid format. Floyd's high-energy, interactive presentation features real-world examples from changemakers across the country, highlighting best practices and user-friendly technology for making your nonprofit fundraising events, including auctions, a smashing success.

Speakers

## Floyd Jones

Floyd is the Community & Partnerships Director at Givebutter, a fundraising platform that has powered over \$500M in donations for a million changemakers worldwide. He spearheads the growth strategy of the Community Team by leveraging partnerships, sponsorships, strategic campaigns, and special events. Floyd's career has been dedicated to building social impact communities and has raised over \$1M for grassroots organizations. His work has been recognized by notable brands such as ESPN, NIKE, and Whole Foods.

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Mon, Apr 17, 2023

3:00pm - 4:15pm

Becoming an antiracist learning community

Recognized as an IDEA Champion by AFP Global in 2020 and 2021, AFP Triangle began focusing on finding innovative ways to work with other chapters, organizations, and thought leaders to continue to advance our own learning and understanding to become an antiracist learning community.

Education Track: Volunteer Involvement

Audience: Introductory/Foundational

## Speakers

Amy Smith, CFRE

Conservation Trust for North Carolian - Director of Philanthropy

Amy Smith leads the philanthropy department at Conservation Trust for NC (CTNC) and works to conserve land for resilient, just communities throughout North Carolina. A graduate of N.C. State University in Raleigh, Amy currently serves as President of the AFP Triangle NC Chapter and spends much of her time supporting the IDEA Committee. Amy lives in Raleigh with her husband, Aaron, and son, AJ.

## Casey Therrien, MSc

Triangle Land Conservancy - Associate Director of Philanthropy

Throughout her decade plus of fundraising, Casey Therrien (She/Her), has worn many hats from prospecting, to database management, to managing the annual fund, writing grants, and managing budgets. Casey currently serves as the chair of the Scholarships Committee and as the Treasurer for AFP Triangle and with the AFP Global Diversity Scholarships Task Force because she believes inclusion, diversity, equity, and access are essential to effective fundraising.

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Mon, Apr 17, 2023

3:00pm - 4:15pm

Breaking the Generational Divide - A Key to Legacy Success

The session breaks down the differences and similarities between generations from a socioeconomic, political, and cultural perspective; what makes every generation special and how to start a legacy conversation. The goal is to look beyond today and start planning for the future by engaging with the legacy donors of tomorrow.

Education Track: Relationship Building

Audience: Strategic

## Speakers

Ligia Peña, CFRE, AFP Master Trainer, PhD candidate

GlobetrottingFundraiser - International Legacy Consultant

Ligia Peña, CFRE is an international legacy consultant at GlobetrottingFundraiser focusing on developing gifts in wills strategy and marketing. She's also a Ph.D. candidate at the University of Kent, researching national legacy marketing campaigns. As an AFP Master Trainer, she's trained countless fundraisers around the globe. She's a sought-after and seasoned international presenter who enjoys sharing her knowledge and empowering nonprofits professionals to think differently about legacies by daring to be creative and innovative.

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Mon, Apr 17, 2023

3:00pm - 4:15pm

How to Create an Integrated and Inclusive Development and Communications Plan

Relationships are at the core of fundraising and effective communications strengthen relationships. It's crucial to integrate your development and communications initiatives in strategic and inclusive ways. This session will help attendees walk away with an effective plan that can help strengthen engagement, raise revenue, increase productivity, and advance equity.

Education Track: Relationship Building

Audience: Strategic

#### Speakers

Jonathan Meagher-Zayas, CFRE, MSW, MPA, CDP

Equity Warrior Strategies LLC - Owner & Chief Strategist

Jonathan Meagher-Zayas is a Queer Latinx Millennial nonprofit strategist dedicated to addressing equity issues, building capacity, engaging the community, motivating new impact leaders, and getting stuff done. Jonathan wears many professional hats including fundraiser, nonprofit strategist, coach, trainer, adjunct professor and macro social worker. He is the Owner & Chief Strategist of Equity Warrior Strategies LLC, a consulting company that provides leadership development, community engagement, and equity strategy services to the social impact sector.

Gerianne Puskas, CFRE, MBA, AFP Master Trainer, CNPM

Lollypop Farm - Vice President of Development and Communication

Gerianne Puskas is the VP of Development and Communications for Lollypop Farm near Rochester, NY. She has over 25 years of experience in fundraising, non-profit management, strategy design and implementation. She has served in various positions with local and national nonprofit agencies where she focused on diversifying fundraising portfolios; building and developing new teams; marketing; and managing regional and national accounts. She is a CFRE, AFP Master Trainer, and an Award-Winning Marketing Expert.

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Mon, Apr 17, 2023

3:00pm - 4:15pm

How You Can Gather Focus Group Data That Will Drive Your Work

Focus Groups are a powerful research method used to gauge impact and drive change. As a Fundraiser, you already possess many of the skills needed to adopt this strategy. Come to watch a live focus group, learn additional tools, and leave ready to conduct your own focus group.

Education Track: Current and Prospective Donor Research

Audience: Applied

#### Speakers

Kacey Jones, CFRE, MA

Kacey Jones is a seasoned grant writer, programmatic evaluator, and development professional with more than two decades of experience as a qualitative researcher. She conducted an impact assessment of a USAID-sponsored scholarship program for girls in Guatemala, has published on the effectiveness of community gardening and literacy programs in Mali, West Africa, and teamed with Tribal College faculty and students to secure long-term STEM funding at Chief Dull Knife College on the Northern Cheyenne Reservation.

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Mon, Apr 17, 2023

3:00pm - 4:15pm

How We're Transforming Our AFP Chapter Through a Commitment to IDEA

Join AFP Southern Arizona board members to learn about how they're transforming their chapter through a commitment on IDEA. This panel session will examine the AFP Southern Arizona as a case study in implementing IDEA followed by interactive discussion and participant brainstorm about IDEA in their own chapters and organizations.

Education Track: Ethics, Accountability and Professionalism

Audience: Applied

#### Speakers

Anton Russell

Beginning with my roots in storytelling at 8-years old, through poetry, through emceeing, through mediating & mentoring I have honed my focus as a fundraiser of the most excellent form – in-kind donations of people’s time & energy. This centers my intentions in every human moment I interact with as a writer, an intimate partner, a single father, a friend, a Co-Executive Director, a community workshop facilitator & a Teaching Artist.

Valerie Sipp, MA

Living Streets Alliance - Manager of Operations

With a masters in Contemporary Art with a focus on human behavior and interactions, I have worked in Tucson non-profits for nearly eight years, most recently becoming the Operations Manager at an advocacy organization. My IDEA (Inclusion, Diversity, Equity, Access) journey began four years ago through a local collaborative group before I became the AFP IDEA Committee co-chair for two and a half years where I assisted in the revamping of the committee.

Edna Meza Aguirre, CFRE, JD

Arizona Center for Womens Advancement - Development Director

A first-generation Tucson native, Edna is fluently bilingual and bicultural, with Spanish as her first language and learning English at age seven. Edna self identifies as BIPOC/Latinx, and she is governed by the tenet that representation is crucial. She brings a unique background of law, teaching, political and not for profit fundraising to her 20 year career.

Elise Christmon

The Nature Conservancy - Digital Production Manager

After being forged in the fires of the nonprofit art sector at MOCA Tucson, I accepted a fundraising role at the Sonoran Institute and fell in love with environmental justice, leading to my current role in Membership at The Nature Conservancy. I have served on the board of the Association of Fundraising Professionals, Southern AZ chapter since 2019, establishing the BIPOC Nonprofit Workers support group and assisting in the chapter's groundbreaking IDEA work.

Julie Ragland

As an anthropologist and social change maker, my vision is to create a world where everyone can live and thrive in liberation and love. Through my involvement in AFP over a long development career. I became heavily involved in IDEA work in our chapter and community. My identities as mother, capoeira martial-arts instructor, visual artist, poet, dancer, animal lover, and breast cancer survivor allow me to connect with others in meaningful ways.

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Mon, Apr 17, 2023

3:00pm - 4:15pm

Laissez les bons temps rouler! Building Your Organization’s “Dream Team” to Secure that Big Gift

Large shop? Small shop? Learn ways to better engage program teammates, volunteer leaders, and your executives to help secure truly transformational gifts and have fun along the way. This interactive session will help you deepen donor engagement and find new ways to grow revenue while building trust on your team.

Education Track: Securing the Gift

Audience: Applied

Speakers

Julie Upham, CFRE

Conservation International - Vice President, Individual Giving

Julie Naranjo Upham is the VP, Individual Giving at Conservation International. She oversees more than \$60M in revenue through the annual, major, and principal giving teams. She has lead CI's Special Events program and their global Business Councils. In addition to her CI experience, she lead the National MS Society's Major and Planned giving teams and has an MPA in Nonprofit Management. She is a mom of three, AFP-DC Board member, and an avid triathlete.

Taylor McMillan

National MS Society - VP, Individual and Foundation Giving

Taylor McMillan is the VP, Individual Giving & Foundation Relations for the National MS Society. She is a member of the Leadership team that oversees \$180M annually and her team of 25 raises more than \$50M through midlevel, major,

planned, and foundation giving. Prior to this role, Taylor lead all fundraising efforts for the Society's South Central region. She is a mom of two boys, an active mentor of fellow fundraisers, and a travel lover.

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Mon, Apr 17, 2023

3:00pm - 4:15pm

It's Deductible! Keeping the IRS and Your Donors Happy

Do your eyes glaze over when you hear, "IRS"? In this highly interactive session, learn about gift substantiation, disclosures, and acknowledgement all while having fun! Participants will leave better prepared to solicit and steward gifts with confidence.

Education Track: Ethics, Accountability and Professionalism

Audience: Applied

Speakers

Nancy Brown, CFRE, MSA

Winona Community Foundation - Executive Director

Brown has been in the fundraising profession for more than 25 years working in higher education, healthcare, charitable estate planning, consulting, and community foundations. She presents frequently to local AFP chapters, nonprofit groups, and was an instructor in the Master's in Philanthropy and Development programs at LaGrange College and Saint Mary's University. She has volunteered at all levels of AFP including global board service and chapter president.

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Mon, Apr 17, 2023

3:00pm - 4:15pm

A (Cis) Man's Place Is in This Session: No, Really, Come to This Session

Do you get a sense that womxn in the field have a heavy load to bear? Feel like some men are making all men look bad? Wondering what YOU could do/not do about it? You don't have to be that guy any more. Come learn how to help seed change.

Education Track: Ethics, Accountability and Professionalism

Audience: Applied

Speakers

Heather Hill, CFRE, AFP Master Trainer, CNM, Q3 Leadership Coach

Chapel & York - Executive Director, US Foundation

Heather is a seasoned nonprofit leader with two decades of nonprofit experience and an extensive background in leadership and management, fundraising, marketing and communications, grant seeking, strategic planning and analytics. A highly rated international speaker and a passionate thought leader and volunteer, Heather has received multiple awards for her work (including for her "#thanksGivingTuesday" initiative) and is also Chair of Rogare, the international fundraising think tank.

Cherian Koshy, CFRE

Merit America - Vice President of Development

Cherian Koshy is a Certified Fund Raising Executive (CFRE), Chartered Advisor in Philanthropy (CAP), & AFP Master Trainer. Cherian is the Vice President of Development at Merit America, a nonprofit organization that is closing the opportunity gap at scale by preparing talented workers in low-wage roles for well-paying careers - breaking the cycle of poverty, and building a new pathway to the middle class for tens of millions of Americans.

Tycely Williams, CFRE, Executive Master's, Certificate in Philanthropic Psychology

Bipartisan Policy Center - Chief Development Officer

Over the past twenty-five years, Tycely has inspired investments of more than \$150 million dollars for social good. She currently serves as Chief Development Officer for The Bipartisan Policy Center. Additionally, she leads the AFP global Inclusion, Diversity, Equity, and Access Committee; chairs the governing boards of three organizations, and teaches Fundraising and Leadership at The Pennsylvania State University. Tycely is a Certified Fundraising Executive and holds an Executive Master's in Leadership from Georgetown University.

Ashley Belanger, Certificate in Philanthropic Psychology & Certified Quadrant 3 Leadership Coach

Ashley Belanger Consulting - Owner & Principal Sparkplug

After 10 years as a founding ED, Ashley's dedicated to being the person she wished she'd had. She loooooooves applying research and theory to co-create change alongside clients pursuing justice. She holds a Certificate in Philanthropic Psychology and is a Certified Quadrant 3 Leadership Coach. She serves as a Council Member and contributing author for Rogare, the global fundraising think tank. In her practice, she provides strategic counsel, one-on-one coaching, and expert donor communications.

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Mon, Apr 17, 2023

3:00pm - 4:15pm

Ten Ways To Support Mental Health and Wellbeing At Work

As a mental health care crisis continues to impact our country, companies are faced with employees coping with stressors to their mental health and well-being. This workshop will explore how to augment traditional ways to support the mental health. Included in the ten ways to bolster mental health are wellness programs, EAP programs, coaching and the use of technology and apps.

Education Track: Leadership and Management

Audience: Applied

Speakers

Linda McGhee, JD, PhD

McGhee and Associates, LLC - Clinical Psychologist

Linda McGhee, (she, her, hers) is a clinical psychologist who received her undergraduate degree from the University of Michigan and doctorate in psychology and law degree from George Washington University. She completed the Diversity and Inclusion Program at Cornell University. Dr. McGhee owns a private practice in Chevy Chase MD. She writes and speaks nationally on equity in mental health, self-care for leaders and diversity in companies.

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Mon, Apr 17, 2023

3:00pm - 4:15pm

Road Map for Big Donors: Secrets From How Raise Millions Dollars

How to achieve fundraising goals increasingly audacious in the current scenario? Come and see how it is possible to reach millions of dollars when you build the perfect road map for big donors. The session will provide practical tools on how to engage and cultivate strong relationships with philanthropists.

Education Track: Relationship Building

Audience: Strategic

Speakers

Flavia Lang, MBA

Tools4Change Brasil - Managing Partner

Flavia is a curious and creative fundraising entrepreneur who helps NGOs to connect and develop meaningful relationship with individual donors. With entrepreneurial vision, creative leadership to inspire and engage teams to overcome challenges and goals, empowerment management style, the desire to turn the impossible possible, and a successful record in opening, restructuring, expansion and exponential growth of NPO. She is also a cofounder of Woman in Fundraising Brazil.

Ana Flavia Godoi, MBA

Women in Fundraising - Founder and CEO

She is the founder of Women in Fundraising, providing hands-on, comprehensive fundraising leadership for female fundraisers around the world. For 12 years she was on Brazilian Fundraising Association's board. Ana has over 25 years of experience in fundraising for non-profits and foundations, focusing on strategic and development planning, major and corporate gifts. During pandemic, she raised 36 millions dollars and helped more than 500 NGOs to develop better negotiation techniques.

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Mon, Apr 17, 2023

3:00pm - 4:15pm

### Understanding Donor-Advised Fund Giving Patterns and How to Customize Your Solicitation Strategy

Join Dr. Dan Heist for insights from his latest academic research on donor-advised funds (DAFs). Session participants will explore the various patterns that donors use when giving through a DAF. After learning how to recognize those patterns, we will discuss effective solicitation strategies for the different types of DAF donors.

Education Track: Securing the Gift

Audience: Strategic

#### Speakers

Dan Heist, CFRE, PhD

Brigham Young University - Assistant Professor

Dr. Heist is an Assistant Professor of Nonprofit Management at Brigham Young University. He earned a master's degree in Philanthropic Studies from the IU Lilly Family School of Philanthropy and a PhD in Social Welfare from the University of Pennsylvania. His research focuses on philanthropy and fundraising. His nine years of professional fundraising experience inform his research and teaching. He is a leading expert on donor-advised funds and co-founder of the Donor-Advised Fund Research Collaborative.

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Mon, Apr 17, 2023

3:00pm - 4:15pm

### A Culture For Philanthropy

A strong infrastructure is essential to support a thriving referral-based medical philanthropy (RBMP) program. Join a panel of experts to learn operational principles that help ensure each component of the RBMP program is appropriately tracked, measured, and ultimately grown for the greater success of the institution and its vision.

Education Track: Current and Prospective Donor Research

Audience: Strategic

#### Speakers

Mark McCampbell

Advancement Resources - Senior Vice President

With over 4 decades of experience in a wide range of development leadership positions, Mark has worked with leaders in healthcare, higher education, arts, human services, and faith-based institutions to help organizations prepare and take steps towards the next level of growth. He is active in various fundraising professional organizations, community nonprofits, and boards.

Michael Delzotti

UK Markey Cancer Center Foundation - President & CEO

Michael Delzotti has over twenty-three years' experience as a leader in the non-profit field. Mike began his nonprofit career as the program administrator for Washington Workshops in DC then spent several years managing hospital departments and clinics in Philadelphia. Returning to philanthropy, he joined a public foundation in Los Angeles then spent time as an executive director of development at UCLA then VP of Development at Special Olympics.

Shashea Adams-Guess

UT Southwestern Medical Center - Associate Vice President of Planning and Advancement Services

Shashea L. Adams-Guess is Associate Vice President of Planning and Advancement Services at UT Southwestern Medical Center where she leads strategy development and operations for the philanthropic arm of the institution to help expand its base of support and drive pipeline growth. As a member of the Office of Development and Alumni Relations executive leadership team, she serves as trusted advisor to the Vice President, providing counsel on organizational structure, climate, and culture.

Caleb Dutzer

Advancement Resources - Director, Business Development

Caleb works closely with academic, healthcare, and nonprofit organizations to develop and execute a customized and strategic approach to deepen the culture of philanthropy within each organization while supporting long-term

transformation. In addition, Caleb is part of the facilitation team that delivers professional education for healthcare, academic, and nonprofit organizations. Through these engagements, he is involved in many client-focused projects and is honored to serve these organizations in a variety of ways.

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Mon, Apr 17, 2023

3:00pm - 4:15pm

Stewarding Sustaining Donors (Presented by Blackbaud)

Did you know that sustained givers increase the giving to your organization by as much as 300% over the course of 2 years. In this advanced session, learn strategies for engaging and retaining sustaining donors. Come prepared to brainstorm, share, and learn strategies that you can implement at your organization.

Education Track: Securing the Gift

Audience: Applied

Speakers

Rich Waldmann

Rich Waldmann is a Blackbaud University Instructor and has been working in the nonprofit & K-12 sectors for 15 years in a variety of roles: Database Administration, Event Management, Major Giving and most recently serving as the Director of Development for a performing arts center. Rich has presented at BBCon, Blackbaud K-12 User Conference and several roadshows across the U.S. sharing his experience and expertise from his years on the ground in non-profit fundraising

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Mon, Apr 17, 2023

3:00pm - 4:15pm

The Promise and Perils of ChatGPT for the Nonprofit Sector (Presented by DonorSearch)

ChatGPT has seemed to take the nonprofit by storm in 2023 and quickly gained 100 million users in 6 weeks. By most accounts, the technology that ChatGPT represents is impressive and for many nonprofits, ChatGPT represents one of the first practical exchanges of information between AI and humans. But with great technology comes great responsibility. This presentation will discuss the short and long-term advantages of AI technologies like ChatGPT and provide insights on how your nonprofit can evaluate the benefits of this technology.

Education Track: Ethics, Accountability and Professionalism

Audience: Introductory/Foundational

Speakers

Nathan Chappell, ACFRE

DonorSearch AI - Senior Vice President

As a thought leader, public speaker, author and inventor, Nathan is one of the world's foremost experts on the intersection between Artificial Intelligence and philanthropy. Nathan serves as Senior Vice President of DonorSearch AI, where he leads AI deployments for many of the nation's largest nonprofit organizations. Nathan's subject matter expertise has been featured in several publications, including Fast Company, University of Notre Dame and the Association of Healthcare Philanthropy.

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Mon, Apr 17, 2023

3:00pm - 4:15pm

Avoiding Campaign Calamities (Presented by Carter)

Preparing for and completing a successful campaign requires great planning and execution. In addition, it is also vitally important that you avoid some "campaign calamities" which can compromise a campaign's success. Please join Steve Higgins, CFRE for a robust conversation that will ensure you are positioned for campaign success!

Education Track: Securing the Gift

Audience: Applied

Speakers

Steve Higgins, CFRE

Carter - President & CEO

Steve serves as the President & CEO of Carter, a global consulting company specializing in fundraising, governance and organizational planning. Prior to co-founding Carter in 2011, Steve spent six years as a Senior Vice President of Ketchum. Steve is a Past President of Indian River County's, Association of Fundraising Professionals (AFP), and has served on AFP Global's Committee on Directorship. A graduate of Elon University, Steve resides in Vero Beach, FL.

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Mon, Apr 17, 2023

3:00pm - 4:15pm

HEARD: How to Become a Better Leader - and Fundraiser - Through Active Listening

Do you often find conversations at work frustrating or even counter-productive? Have you ever wondered if there was a better way? Attend this fast-paced and interactive session to learn how to actively listen your way to success for more productive and rewarding relationships with your boss, staff, colleagues and/or donors. Eligible for 1.25 ACFRE credits in Leadership or Management

Education Track: Leadership and Management

Audience: Applied

Speakers

Martha Schumacher, ACFRE, CFRE, MInstF

Hazen and HILT - President

Martha H. Schumacher is President of Hazen Consulting and the Hazen Institute for Leadership Training (HILT), creating global strategies to elevate social impact and philanthropy. Her current and recent clients include American University, Best Buddies International, Campaign for Tobacco-Free Kids, and National Geographic Society. Martha is a past AFP Global Chair. She lives in Alexandria, Virginia with her husband Casey and their sweet yet energetic rescue dogs Gage and Josie.

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Mon, Apr 17, 2023

3:15pm - 3:45pm

The 360 Degree DonorView (Learning Lab)

Are you able to see all your donor's giving, engagement, and interaction patterns? Do you have a plan for tracking, reporting, and analyzing the data you collect? In this lesson we'll examine the elements you need to create a complete picture of your donors and what you can do with the data to improve your fundraising. We'll show you how a CRM software like DonorView can help you achieve your goals and improve your donor's experience as well.

Speakers

Kimberly Perron, MBA

Kimberly is a Customer Success Instructor providing training and course development for DonorView software. She has over 15 years of experience working in administration and fundraising for a variety of non-profits supporting environmental, arts, and social service causes.

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Mon, Apr 17, 2023

3:15pm - 3:45pm

Articulating your Aspiration (Learning Lab)

Many organizations are wondering when they will receive the mysterious call asking them "if you were to receive a transformative gift, how would you spend it?". Is your organization ready to answer that call? The Big Ask – Before you ask for a transformational gift or you start your campaign, you need to have a strategy in place. Preparing your case for support is key. Your organization needs to establish a clear vision and be able to articulate that vision at any time.

Questions to consider: What do you have planned? How are the next few years going to look? How will you use this money?

Speakers

Ashley Franks

Ashley is a nonprofit strategist in PNC Institutional Asset Management as part of the Nonprofit Strategy and Solutions team. In this role, she helps enhance nonprofit client relationships through direct engagement by providing customized guidance. Using her knowledge of the nonprofit sector, she works directly with market teams and nonprofit clients in

variety of areas including investments, governance and operational best practices, distribution strategies and philanthropic planning.

Tisha Hyter

Tisha is a senior nonprofit strategist in PNC Institutional Asset Management as part of the Nonprofit Strategy and Solutions team. In this role, she helps enhance nonprofit client relationships through direct engagement by providing customized guidance. Using her knowledge of the nonprofit sector, she works directly with market teams and nonprofit clients in variety of areas including investments, governance and operational best practices, distribution strategies and philanthropic planning.

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Mon, Apr 17, 2023

4:00pm - 4:30pm

Learn About AFP 360 with Korn Ferry Advance Program (Learning Lab)

Speakers

Joshua Daniel

Korn Ferry - Coach and Associate Principal

Josh Daniel is a Coach and Associate Principal consultant with Korn Ferry out of Austin, TX. Josh has been supporting the career coaching offering for AFP360 members and specializes in supporting members in job search strategy, navigating professional transitions, and career advancement. Josh's career is supported by a Master's Degree in Organizational Behavior studies and a professional certification in Executive Coaching from the University of Texas at Dallas.

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Mon, Apr 17, 2023

4:00pm - 4:30pm

Leveraging The Donor Journey: Insights and Best Practices for Growth (Learning Lab)

How deeply connected are you to your patron's experience? How often do your donors engage with your organization? Not just your top patrons, but the myriad who connect with you once or twice annually? Are you controlling their journey and leading them to a transformational engagement, or are you tapping the surface and missing core relationship-building opportunities? This webinar session will reveal how adopting a patron journey strategy drives lifelong customer engagement, show how innovative touch strategies produce rich patron connections, and how listening to your base and connecting with their pain points can create emotional relations that drive growth. Join Robert Friend, a seasoned executive in the nonprofit community and an Enterprise Solutions Executive with Eventgroove as he outlines the story and strategies behind Customer Journey Management and Mapping, an absolutely critical management play as we navigate growing our capacity amidst the backdrop of a financially-challenged landscape.

Speakers

Robert Friend

Robert Friend is a global fundraising, sales, marketing and communications professional. He brings decades of leadership in the nonprofit and commercial arts, entertainment, and technology industries with a successful track record in strategic marketing, innovative fundraising, sales growth, events planning & management, and financial business operations. Robert is a Senior Enterprise Solutions Executive with Eventgroove focused on organizational problem-solving and delivering "best-in-class" solutions for long-term, sustainable growth and success to the nonprofit marketplace.

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Tue, Apr 18, 2023

8:00am - 9:15am

Getting Your Organization Prepared Before Launching Any Campaign

Preparation before you launch any campaign is the key to sustainable campaign success. The 5 MUST areas to address are: 1) Board 2) DEI&A and Community Engagements Programs; 3) Staff; 4) Budget; and 5) Bandwidth to do regular AND Campaign fundraising activities. Let's get you ready for your next campaign!

Education Track: Leadership and Management

Audience: Strategic

Speakers

Michael Baker, CFRE

m3 Development - Partner & Founder

Michael J. Baker, CFRE, is a founder and partner of m3 Development, a full-service consulting firm working with non-profits and foundations. His leadership of the firm and consulting efforts has led to a great deal of success for m3 Development clients. Prior to m3 Development, Michael worked with the American Cancer Society, National Hemophilia Foundation and Boy Scouts of America. Michael has over 25 years of experience in the field of philanthropy and non-profits

Laura Fredricks, JD

THE ASK - CEO and Founder

Laura Fredricks, JD, is the Billion Dollar ASK Maker Powerhouse, who as CEO and Founder of THE ASK®, and an international consultant, trains and coaches individuals, nonprofits and businesses on How to ASK and GET exactly what you want. Her best-selling book: "THE ASK: For Business, For Philanthropy, and Everyday Living" has helped hundreds of boards, fundraisers, attorneys, business owners, entrepreneurs, teenagers, artists, and philanthropists get their Best Life Possible, through THE ASK.

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Tue, Apr 18, 2023

8:00am - 9:15am

How to Prioritize (Way!) Better in Fundraising

Even on the best of days, fundraising can feel like an impossible puzzle. So many GOOD things to do, but which is BEST? In this interactive presentation, fundraising coach Derik Timmerman will share his practical methods for discerning and prioritizing as a fundraising professional, even under extreme pressure.

Education Track: Leadership and Management

Audience: Applied

Speakers

Derik Timmerman, PhD, CFRE

Sparrow Nonprofit Solutions - Founder

Derik Timmerman, CFRE is the Founder of Sparrow Nonprofit Solutions, a nationwide consulting firm helping nonprofits maximize their world-changing impact. Prior to founding Sparrow, Derik was a management consultant at McKinsey & Company and a US Army Intelligence Officer with two combat deployments to Iraq. Derik earned his Bachelor's from the US Military Academy at West Point, a Masters from Liberty University, and is completing a PhD in Philosophy in Spring 2023.

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Tue, Apr 18, 2023

8:00am - 9:15am

Moving Beyond Bricks and Plaques: New Perspectives on Building Inclusive Naming and Recognition Practices

Our exploration of naming and recognition policies will address the nonprofit sector's inherent power dynamics. This session will look into the shift toward inclusivity and community-based approaches. We will reflect on organizations' naming and recognition practices, as well as the understanding of the community's needs, interests, and opinions.

Education Track: Ethics, Accountability and Professionalism

Audience: Applied

Speakers

Melissa Berliner

A Gen Xer, Melissa brings 19 years of development experience to her work as a Vice President for Campbell & Company. She has helped clients close significant gifts from Gen Xers and has a proven ability to quickly identify and address challenges facing organizations. Prior to coming to Campbell & Company, Melissa managed multi-million dollar fundraising programs at the Columbia Art Museum, Victory Gardens Theatre, and Steppenwolf Theatre. She is the President-Elect of AFP Chicago.

Sarah Marino, MBA

Campbell & Company - Vice President, Fundraising

Sarah Marino brings a tailored approach to each engagement and an appreciation for the uniqueness of every cause and community in her work at Campbell & Company. In her 20 years of direct development experience, she has managed multi-sector, high-value partnerships as well as a national major gifts team. Sarah holds an MBA from the University of San Francisco. She serves as Campbell & Company's manager of Diversity, Equity, Inclusion, and Access.

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Tue, Apr 18, 2023

8:00am - 9:15am

Staffing Your Fundraising Operation: Structure, Attract & Retain

This fundraising staffing workshop explores the various options to staff your organization's fundraising operation, structuring the position in a way that's most likely to attract top talent and what you can do as a manager to keep your fundraising staff happy and serving your organization for the long term.

Education Track: Leadership and Management

Audience: Applied

Speakers

Chad Barger, CFRE, AFP Master Trainer, CNP

Productive Fundraising - Chief Strategist & Owner

Chad Barger, CFRE, CNP is a sought-after nonprofit fundraising speaker, master trainer and coach. Chad owns the firm Productive Fundraising which specializes in teaching the latest research-based fundraising tactics and making them approachable for small, community-based nonprofit organizations. He shares actionable nonprofit fundraising tips and free resources at [productivefundraising.com](http://productivefundraising.com).

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Tue, Apr 18, 2023

8:00am - 9:15am

Looking Overseas for Fundraising Opportunity at Home!

Join us for a world tour of fundraising...that will help you to find opportunity in your home market! By comparing fundraising trends and best practice across international fundraising markets, it is possible to see the gaps, potential upcoming pitfalls and areas of opportunity at home.

Education Track: Leadership and Management

Audience: Strategic

Speakers

Emily Bracken, MA

Daryl Upsall International - CEO, Consulting

Emily is the CEO of the Consulting division of Daryl Upsall International, an international leader in supporting fundraising growth through the development of fundraising strategies, program assessments and international expansion planning. She has worked with organizations present in more than 50 countries across Asia, Europe, Africa and the Americas. Her work is focused on gathering a range of local perspectives and specific organizational needs in order to create local solutions based on global best practice.

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Tue, Apr 18, 2023

8:00am - 9:15am

Board Engagement & Fundraising: Evidence-Based Practices that Work!

Fundraising is a primary responsibility of nonprofit boards of directors. However, fewer than half of nonprofits report having boards fully engaged with charitable giving. A recent study using BoardSource data and interviews with successful nonprofits identifies six practical strategies for achieving 100 percent board participation in charitable giving and fundraising.

Education Track: Leadership and Management

Audience: Applied

Speakers

Bill Stanczykiewicz, Ed.D.

Indiana University Lilly Family School of Philanthropy - Senior Assistant Dean for External Relations

Bill Stanczykiewicz, Ed.D., serves as senior assistant dean for external relations at the Indiana University Lilly Family School of Philanthropy, where he directs The Fund Raising School. Bill's professional experience includes leading a youth development nonprofit for 17 years. His research expertise is in board engagement with fundraising.

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Tue, Apr 18, 2023

8:00am - 9:15am

Building Donor Loyalty: What Is New From Research

What factors actually drive donor loyalty and retention? Are the factors that drive how donors expect to behave, the same factors that drive how they actually behave? What are the implications for how we should be managing loyalty? This session will unveil our new longitudinal research on exactly these issues.

Education Track: Relationship Building

Audience: Strategic

Speakers

Adrian Sargeant, MBA, PhD

Institute for Sustainable Philanthropy - Co-Director

Adrian Sargeant PhD is Co-Director of the Institute for Sustainable Philanthropy. He is one of the world's leading fundraising academics and was formerly the first Hartsook Chair in Fundraising at the Lilly Family School of Philanthropy at Indiana University. He is the author Fundraising Principles and Practice, Building Donor Loyalty and Fundraising Management: Analysis, Planning and Practice.

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Tue, Apr 18, 2023

8:00am - 9:15am

"Fundraising is life" how to reenergize yourself and your fundraising

"Please put on your oxygen mask before helping others" We've all heard this before, well, this session IS your oxygen mask. Join Clay and Lynne to explore how the human side of fundraising has changed in recent years and how to respond to these upheavals. We have faced more than a pandemic; we have faced racial and social injustice, the great resignation, civil conflict, working from our living rooms and much more. Regardless of how we perform the tasks and execute strategies, fundraising is a relationship-based profession. WHY we choose our profession and that we choose ourselves as much as we choose to serve others is essential. Using the framework of Recognize, Reveal, and Reframe we will build a model for attendees to follow and build upon. This interactive session, complete with workbook, allows the attendee and the speakers to connect over common experiences and will help guide positive future outcomes.

Education Track: Relationship Building

Audience: Applied

Speakers

Lynne Wester

Donor Relations Guru LLC - Founder and Principal

Lynne is well known resource for donor relations and fundraising expertise. She has published four books and been featured in industry publications. Lynne's philosophy is the goal of any great fundraising operation is to use strategic communications and interactions to foster the relationship between the organization and its donors. Using her expertise and hands on approach, she works with organizations to help them keep their focus donor driven, technologically savvy, and strategic.

Clay Buck, CFRE, AFP Master Trainer

TCB Fundraising - Founder and Principal

Clay is a thirty-year fundraising veteran and is the Founder and Principal of TCB Fundraising, a nonprofit fundraising and communications consultancy focused on building individual giving at all levels. He has served in leadership roles at a variety of nonprofits across the country and has been a senior consultant with major national firms. He has held the Certified Fund Raising Executive credential since 2010, is an AFP Master Trainer.

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Tue, Apr 18, 2023

8:00am - 9:15am

## What Funders Want (Presented by Bonterra)

Bonterra surveyed hundreds of funders across the country to find out what they look for from nonprofits when making grant decisions. We'll discuss key takeaways from this fundraising and grant data with a funder and a nonprofit, and we'll focus on how nonprofits can put themselves in the best position to win grants.

Education Track: Current and Prospective Donor Research

Audience: Applied

### Speakers

Benjamin Miller, MS

Bonterra - SVP of Data Science and Analytics

Ben Miller is an entrepreneur drawing upon degrees in mathematics and systems engineering to advance applied data science in the nonprofit sector. He is the SVP of Data Science and Analytics at Bonterra and has helped raise billions of dollars from tens of millions of donors for thousands of organizations over his career. Ben serves on the Research Council for the AFP and is the chair of the Fundraising Effectiveness Project.

Nicole McPhail

Darwin Pivot - Managing Partner of Social Impact

Nicole has spent most of her career at the intersection of Social Impact and innovation, helping companies think differently about designing, implementing, and measuring their Social Impact programs using her unique background in Corporate Social Responsibility, behavioral science, and human-centered design. She has seen the industry from many perspectives as an in-house CSR practitioner for Intuit, a CSR consultant for some of the world's biggest brands, and during her time in Not for Profit.

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Tue, Apr 18, 2023

8:00am - 9:15am

## 4 Pillars of Social Media Engagement for Fundraisers (Sponsored by Bonterra)

With increased digital donations, social media is rising as a powerful tool to build relationships with your current donors and attract new ones. In this session, attendees will learn 4 ways to build deeper relationships with social media followers and convert them into long-term supporters.

Education Track: Securing the Gift

Audience: Applied

### Speakers

Josh Hirsch, MS

Barlele - Digital Communications Consultant

Josh Hirsch has worked in the nonprofit sector since 2006 with a focus on educational philanthropy for both public charter and independent private schools. He has an extensive background in social media, digital communications, and marketing along with experience in grant research and writing, individual giving, special event planning, stewardship, and cultivation of donors.

Julia Campbell

J Campbell Social Marketing - Digital Storytelling & Social Media

Julia Campbell is on a mission to make the digital world a better place. Through speaking, training, and consulting, she shows social purpose organizations how to use social media and storytelling to build communities, showcase impact, and advance their causes. Her passion is to get organizations and change makers to stop spinning their wheels and start getting real results using digital tools.

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Tue, Apr 18, 2023

8:00am - 9:15am

## 2023 Top Nonprofit Challenges and How to Overcome Them (Presented by OneCause)

The fundraising landscape has dramatically changed in the past three years, and the problems nonprofits are facing have shifted repeatedly. In the 2023 Fundraising Outlook Study, 900 nonprofit professionals shared the top challenges facing

their nonprofits, which are shifting away from pandemic-related planning and recovery to donor-focused themes. This session examines those challenges and offers practical tips and strategies to help you overcome them

Education Track: Leadership and Management

Audience: Introductory/Foundational

#### Speakers

Emily Newberry

OneCause - VP of National Accounts

Emily Newberry is the VP of National Accounts at OneCause. She's passionate about technology and the impact it has on people, organizations, and communities. She works directly with national nonprofit organizations and their leaders to understand challenges and opportunities and collaborate on ways to engage donors and use technology to meet fundraising and stewardship goals.

Karrie Wozniak, MA

OneCause - Chief Marketing Officer

Karrie brings 20 years of experience in marketing, brand management, advertising, and sales to her role as Chief Marketing Officer of OneCause. As one of the early-stage executives, she played a key role in building the nationwide sales team, event consulting, client success & overall marketing. Karrie previously held management positions at Ford Motor Company and Dominion Enterprises before joining OneCause (then BidPal) in 2009.

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Tue, Apr 18, 2023

8:00am - 9:15am

MID-LEVEL DONORS: KEY STRATEGIES IN STEWARDING, ENGAGING, SOLICITING AND UPGRADING (Presented by Catapult Fundraising, Inc.)

Join Shannon for an in-depth discussion on fundraising best practices for your mid-level donors. Shannon will discuss strategies and fundraising methodologies on how to best engage these prospects and move them up the giving pyramid.

Education Track: Securing the Gift

Audience: Applied

#### Speakers

Gwen Paxon, ACFRE

Catapult Fundraising, Inc. - Vice President of Client Services

For over 20 years, Gwen has been passionately working in development on both the consulting and institutional sides. She brings a wealth of knowledge from her extensive experience to the clients she works with. Gwen's ability to identify areas of opportunity helps the programs she manages reach their maximum potential. Gwen holds a MA in Philanthropy and Development from Saint Mary's University in Minnesota and an MBA from North Park University. Gwen served as a board member of the AFP Las Vegas Chapter and currently serves as president of the AFP New Jersey Chapter.

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Tue, Apr 18, 2023

9:15am - 9:45am

Segmenting for success: How to Build a Detailed Engagement Plan for Your Donors (Learning Lab)

Floyd Jones, Director of Community & Partnerships at Givebutter, shares the steps for creating a donor engagement strategy that will sustain your organization year-round, breaking down the vast possibilities for donor segmentation, showcasing the best tools for donor management and data tracking, and featuring real-life examples of optimized personalized communications that any nonprofit can put into action.

#### Speakers

Floyd Jones

Floyd is the Community & Partnerships Director at Givebutter, a fundraising platform that has powered over \$500M in donations for a million changemakers worldwide. He spearheads the growth strategy of the Community Team by leveraging partnerships, sponsorships, strategic campaigns, and special events. Floyd's career has been dedicated to building social impact communities and has raised over \$1M for grassroots organizations. His work has been recognized by notable brands such as ESPN, NIKE, and Whole Foods.

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Tue, Apr 18, 2023

10:00am - 10:30am

### Making the Most of Your CRM for Moves Management (Learning Lab)

Learn how to utilize the features in your CRM software and apply them to your major gifts fundraising strategy. Your CRM will need tools to support identifying the best prospects, performing the research to qualify them, tracking your cultivation strategies, soliciting the donation, then stewarding the gift to ensure your donor feels appreciated and knows the gift supports their personal mission.

Speakers

Kimberly Perron, MBA

Kimberly is a Customer Success Instructor providing training and course development for DonorView software. She has over 15 years of experience working in administration and fundraising for a variety of non-profits supporting environmental, arts, and social service causes.

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Tue, Apr 18, 2023

10:00am - 10:30am

### Board Optimization (Learning Lab)

As boards evolve to become ambassadors, fundraiser and thought leaders for your organization, do you have the right infrastructure, people and policies to help your board thrive for your organization? Topics addressed could include: Governance Gift acceptance policy Board investment policies Succession planning Board strength for sustainability during adverse times Diversity

Speakers

Ashley Franks

Ashley is a nonprofit strategist in PNC Institutional Asset Management as part of the Nonprofit Strategy and Solutions team. In this role, she helps enhance nonprofit client relationships through direct engagement by providing customized guidance. Using her knowledge of the nonprofit sector, she works directly with market teams and nonprofit clients in variety of areas including investments, governance and operational best practices, distribution strategies and philanthropic planning.

Tisha Hyter

Tisha is a senior nonprofit strategist in PNC Institutional Asset Management as part of the Nonprofit Strategy and Solutions team. In this role, she helps enhance nonprofit client relationships through direct engagement by providing customized guidance. Using her knowledge of the nonprofit sector, she works directly with market teams and nonprofit clients in variety of areas including investments, governance and operational best practices, distribution strategies and philanthropic planning.

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Tue, Apr 18, 2023

10:15am - 11:30am

### Pathway to Philanthropist: How FIU is Redefining Charitable Giving

FIU's Pathway to Philanthropist program (P2P) progressive gift tactics empower mid-level capacity donors to advance an institution today and in the future. P2P's financially inclusive approach leverages their capacity, passion and enthusiasm into more impactful gifts focusing on endowment funding, alumni participation, donor retention, engagement, and irrevocable planned gift pipelines.

Education Track: Securing the Gift

Audience: Applied

Speakers

Livia Souza

FIU Foundation - Associate Director, Estate & Planned Giving

Livia Souza leads major gift officers through FIU's Office of Estate & Planned Giving in its Next Horizon Campaign and is co-team lead for women's initiatives under FIU's Office of Inclusive Philanthropy. Previously, Livia worked as a fiduciary

financial advisor managing a book of business of more than 350 clients and providing financial planning services for university employees in South Florida. She studied Finance and Economics at Florida State University.

Laura Padron

FIU Foundation - Associate Vice President, Development

Laura Padron, Associate Vice President, Development, leads FIU's Next Horizon Campaign with major gift officers across Academic Colleges and Schools, Athletics, and Student Affairs, as well as Estate and Planned Giving and Research and Prospect Management areas. Previously, Laura served at UM's School of Business, spearheading its role in UM's \$1.6B campaign. Before academia, Laura directed the prestigious Presidential Scholars in the Arts and YoungArts programs at the National Foundation for Advancement in the Arts.

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Tue, Apr 18, 2023

10:15am - 11:30am

Donor Advised Funds, Community Foundations, and You: Working Together to Grow Philanthropy

Do donor advised funds frustrate or excite you? Learn how to collaborate with your community foundation to bring more money not just your mission but to your community as a whole. DAF is NOT a four-letter word.

Education Track: Relationship Building

Audience: Applied

Speakers

Nancy Brown, CFRE, MSA

Winona Community Foundation - Executive Director

Brown has been in the fundraising profession for more than 25 years working in higher education, healthcare, charitable estate planning, consulting, and community foundations. She presents frequently to local AFP chapters, nonprofit groups, and was an instructor in the Master's in Philanthropy and Development programs at LaGrange College and Saint Mary's University. She has volunteered at all levels of AFP including global board service and chapter president.

Jeremy Wells, CFRE, MA

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

Jeremy R. Wells, MA, CFRE, serves as Senior Vice President at the Saint Paul & Minnesota Foundation, one of the largest community foundations in the country. Wells is an adjunct faculty member at the University of St. Thomas and a frequently requested speaker in philanthropy. Wells is a former AFP Global Board Member, former AFP PAC Chair, and was also selected as a 40 Under 40 recipient by the Minneapolis/St. Paul Business Journal in 2018.

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Tue, Apr 18, 2023

10:15am - 11:30am

Purposeful Organization Growth

Tragic Growth and Operational Success requires the right mindset, leadership approaches and sustaining performance at the excellence level. This session will expose new learnings in these regards.

Education Track: Leadership and Management

Audience: Strategic

Speakers

Nowshad (Shad) Ali, CFRE, CPVA, CPBA, TriMetrixHD

On Purpose Leadership Inc. - President and CEO

President & CEO of On purpose Leadership Inc since January 2000 Director of Development - The Lung Association, Ontario Director of Development - Osteoporosis Canada Senior Manager Corporate Development - Diabetes Canada

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Tue, Apr 18, 2023

10:15am - 11:30am

Mystery, Tragedy, Fantasy, Adventure. . . Are You Telling Your Board the Right Fundraising Story?

Is your fundraising story one of adventure or does it read like ancient history? The fundraising “stories” we tell our board members can be outdated, confusing, or even fantastical. In this session, you will identify your current fundraising story and explore how to change it for maximum impact.

Education Track: Volunteer Involvement

Audience: Applied

#### Speakers

Amberlie Phillips, MPA

Pathway Associates - Managing Partner

Amberlie Phillips, MPA, is a managing partner at Pathway Associates. She has over twenty years of nonprofit experience and is an expert in large scale fundraising programs and major gifts program implementation. She successfully led the development programs at both YWCA Utah and the Utah Food Bank to record-breaking fundraising success and raised major gifts for San Diego State University. She brings a practical, results-oriented approach to her work with staff and boards.

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Tue, Apr 18, 2023

10:15am - 11:30am

Innovation, Scientists, Experiments, and Pilot Projects....Oh My! Fundraising for Research

Are you struggling with how to fundraise for research? Join this interactive session to explore strategies and tools to increase philanthropy for innovation and experimentation. Learn how to inspire donors with the excitement of investing into discoveries and transformation that advance the mission of your nonprofit.

Education Track: Securing the Gift

Audience: Strategic

#### Speakers

LAUREN COOLER, JD

Lauren Cooler, Esq, has more than 20 years of experience in fundraising. In New York City, she served as a Director of Major Gifts for Memorial Sloan-Kettering, including creating their grateful patient program; Director of Development for The Mount Sinai Medical Center; Director of Major Gifts for NYUStern; and Assistant Vice President for CCS Fundraising. In 2015, Lauren relocated to Los Angeles where she worked as Senior Director of Development for the University of Southern

Terry Pearl, MBA

360 Philanthropy Group LLC - Principal & Founder

Terry Pearl is a leading strategist in fundraising, strategic planning, capital campaigns, corporate/foundation relations, and board development, and has raised more than \$175 million for nonprofits. She has consulted with diverse partners such as American Society for the University of Haifa, Hadassah, Hackensack Meridian Health, and the YWCA of NYC. Prior to consulting, she led fundraising teams for Newark Beth Israel Medical Center, The Headstrong Project, NYU Langone Medical Center, and Mount Sinai Health.

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Tue, Apr 18, 2023

10:15am - 11:30am

Responsive Nonprofits: How To Build Resilient Teams & Drive Sustainable Growth

Most fundraising teams are built on predictability and efficiency in a world where change is constant and experimentation is a must, resulting in a disconnect between supporter expectations and fundraising strategy. Hear how leaders are adopting responsive mindsets to close the gap, exceed fundraising goals, and build resilient teams.

Education Track: Leadership and Management

Audience: Applied

#### Speakers

Erik Tomalis, CFRM

Virtuous - Chief Evangelist & Director of Business Development

Erik Tomalis is a proven fundraising professional that is forward thinking, people driven, but most of all results oriented. With over 20 years of professional fundraising experience, Erik made over 4,000 face-to-face donor solicitations where he has raised millions of dollars for many non-profit organizations. Through all of this, Erik understands how nonprofits can grow global generosity through Responsive Fundraising. He resides in Pittsburgh with his wife, Kate and their shetland sheepdogs (Winnie & Willett).

Beth Fisher

Mel Trotter - Chief Advancement Officer

Beth Fisher is an author, speaker, business leader, cancer-survivor, and marathoner with a passion for helping others overcome. After spending over twenty-five years in corporate sales, Beth now serves as the Chief Advancement Officer for Mel Trotter Ministries. She continues to be passionate about helping others understand the real narrative of human sameness and unconditional love.

Gabe Cooper

Virtuous - CEO & Founder

Gabe Cooper is the founder and CEO of Virtuous Software, the only responsive fundraising platform that helps nonprofits easily create personalized donor experiences at scale that build better donor relationships. Previously, he was in leadership at a large nonprofit and co-founded an innovation consultancy. His drive stems from a passion to create market-defining software and help charities reimagine generosity. He frequently writes and speaks about empowering nonprofits to grow generosity through technology.

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Tue, Apr 18, 2023

10:15am - 11:30am

Planned Giving for People Who are New to Planned Giving

No matter how much you know about planned giving, everyone leaves knowing a bunch more with ideas you can use right away. We will look the subject with humor and fun (yes, really) and you will feel comfortable with the subject and leave confident you can use planned giving easily.

Education Track: Securing the Gift

Audience: Introductory/Foundational

Speakers

Wayne Olson, JD

Shriners Children's - Senior Director, Planned Giving

Wayne Olson heads planned giving for one of the largest healthcare systems in the country. With more than 20 years experience in fundraising, Wayne has worked with donors and other gift officers to raise hundreds of millions of dollars in philanthropic support. He is a frequent trainer, educator and speaker to international conferences and seminars. He is the author of six books, and writes for Crescendo Interactive.

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Tue, Apr 18, 2023

10:15am - 11:30am

2022 Fundraising Effectiveness Project: Using AFP's Donor Giving Data to Improve Your Fundraising Results

This session will report on national donor retention statistics from the AFP's Fundraising Effectiveness Project now in its 17th year of donor retention analysis. Results from more than 20,000 nonprofits can be used as national benchmarks and realist guidelines for improving performance.

Education Track: Leadership and Management

Audience: Introductory/Foundational

Speakers

Benjamin Miller, MS

Bonterra - SVP of Data Science and Analytics

Ben Miller is an entrepreneur drawing upon degrees in mathematics and systems engineering to advance applied data science in the nonprofit sector. He is the SVP of Data Science and Analytics at Bonterra and has helped raise billions of

dollars from tens of millions of donors for thousands of organizations over his career. Ben serves on the Research Council for the AFP and is the chair of the Fundraising Effectiveness Project.

Jim Greenfield, ACFRE

J.M. Greenfield & Associates - J.M. Greenfield & Associates

Jim Greenfield served as a senior fundraising executive providing leadership at eight major colleges and hospitals in his 50-year career. He also is author and editor of ten books and numerous articles on fundraising management and performance evaluation.

Nathan Dietz, PhD

Do Good Institute - University of Maryland - Associate Research Scholar

Nathan Dietz, Ph.D. is a Senior Researcher at the Do Good Institute at the University of Maryland, College Park. His work with DGI focuses on social capital, volunteering, charitable contributions, civic engagement and social entrepreneurship. While working with the Growth in Giving Initiative, he has coauthored two Spotlight reports published by the Giving Institute, sponsors of the annual Giving USA report on American philanthropy.

Alice Ferris, ACFRE, CFRE, MBA, AFP Master Trainer

GoalBusters Consulting - Partner

Alice L. Ferris, MBA, CFRE, ACFRE, is the founder of GoalBusters, supporting small fundraising teams with development training, coaching, strategy, and implementation. For the last 30 years, she has worked extensively in fundraising for public media, rural healthcare, education, and science organizations. Alice thrives in finding creative solutions for the fundraising challenges of small organizations and teaching and training about practical and realistic tactics.

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Tue, Apr 18, 2023

10:15am - 11:30am

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: Leadership and Management

Audience: Applied

Speakers

Chessie Biggam, CFRE, MPA

AQP Consulting - Fundraising Consultant

Chessie Hayes has been an active member of the fundraising community and implements thoughtful, strategic plans to enhance donor engagement. She was an Adjunct Professor at the University of Memphis teaching Resource Development and Nonprofit Storytelling. She received the award for AFP Global's Outstanding Young Professionals. She was awarded the Outstanding Emerging Philanthropist from her local AFP chapter. She serves as the President-Elect for AFP Memphis and on the Emerging Leaders Initiative for AFP Global.

Adrienne McDade Taylor, CFRE, MA, MBA

Skystone Partners - Senior Consultant

Adrienne Taylor is a Sr. Consultant at Skystone Partners. Adrienne started her career in fundraising through the AFP-Greater Cincinnati Chapter's diversity program, New Faces of Fundraising, and now serves on the leadership team. She is the 2023 Greater Cincinnati Chapter President and AFP Global Board Member. Her commitment to IDEA is what keeps her actively engaged with AFP. She is a proud mom, wife, member of Kaleidoscope Investment Group and loves theatrical makeup.

Dzenan Berberovic, CFRE, MA

Avera Health - Chief Philanthropy Officer

Dzenan Berberovic serves at Avera Health as their Chief Philanthropy Officer. He served in several committee roles in his local AFP Chapter. In 2022, he will have the honor of serving the South Dakota Chapter as President. After being named

AFP's Young Professional in 2018, he served on the Next Generation Task Force, ICON Education Committee, and AFP Global's Nominating Committee. He enjoys his role on the AFP U.S. Foundation for Philanthropy Fundraising Board.

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Tue, Apr 18, 2023

10:15am - 11:30am

Peer-to-Peer Fundraising: How to mobilize your donors and build a thriving community (Presented Givebutter)

Interested in peer-to-peer fundraising or eager to improve your P2P campaigns? This interactive workshop will dive into the four key elements of a successful grassroots peer-to-peer (P2P) fundraising campaign: setting intentions, storytelling, segmentation, and supporter mobilization. Givebutter's Floyd Jones will share real-world campaign examples, highlight best practices and technology for optimized P2P fundraising, and facilitate individual reflections and small group breakout discussions, full-group share-outs, and Q&A. Participants will leave with individualized game plans for their own P2P campaigns.

Education Track: Relationship Building

Audience: Applied

Speakers

Floyd Jones

Floyd is the Community & Partnerships Director at Givebutter, a fundraising platform that has powered over \$500M in donations for a million changemakers worldwide. He spearheads the growth strategy of the Community Team by leveraging partnerships, sponsorships, strategic campaigns, and special events. Floyd's career has been dedicated to building social impact communities and has raised over \$1M for grassroots organizations. His work has been recognized by notable brands such as ESPN, NIKE, and Whole Foods.

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Tue, Apr 18, 2023

10:15am - 11:30am

Marketing + Fundraising: A Collaborative Framework That Builds Community & Funding Growth (Presented by Feathr)

Today, people trust corporations more than nonprofits and participation in giving has decreased by 24% in the last two decades. This challenge combined with change as a constant, rising competition, and competing priorities for resources drive many nonprofits to simply opt out of doing marketing. Join this session to explore The Good Marketing framework which decouples fundraising and marketing, while unlocking supporter and funding growth through community-first thinking.

Education Track: Leadership and Management

Audience: Introductory/Foundational

Speakers

Noah Barnett, PhD

Feathr - VP of Feathr

Noah Barnett is a veteran nonprofit fundraising and marketing professional. Currently, he serves as the VP of Marketing at Feathr, the digital marketing platform built to help nonprofits create more engaging digital experiences and expand their impact. Previously, Noah spent over a decade in nonprofit fundraising and marketing leadership roles, most recently as the CMO at Virtuous, and previously at CauseVox, World Help, HubSpot, and The Adventure Project.

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Tue, Apr 18, 2023

10:15am - 11:30am

Recession-Proofing Your Mission to Attract, Retain, and Grow Donors (Presented by Microsoft)

While individual giving increases year after year, the number of donors is decreasing. This means recession-proofing for nonprofits is the only way to continue missions uninterrupted in uncertain times. Your donors are increasingly digital natives who expect personal, relevant, and timely communications that connect them to the impact of their mission.

With limited resources and budget, how are you building lifetime giving into your plans? In this session, we will explore ways to apply marketing, data, and AI to move from single transactions with donors to lasting engagement. ?

Education Track: Leadership and Management

Audience: Applied

## Speakers

Nicole Bechard

As an experienced fundraising and analytics product manager, Nicole has a passion for building delightful products and helping nonprofits achieve new heights using data. As a Senior Product Manager with Microsoft Tech for Social Impact, Nicole is responsible for building innovative fundraising and marketing products designed specifically to meet the nonprofit sector's unmet needs. Prior to Microsoft, Nicole led Blackbaud's predictive analytics product portfolio

Devi Thomas

Devi Thomas, Global Head of NonprofitSolutions, Microsoft Philanthropies, Tech for Social Impact Named one of 2022's Top Women in Communications, Devi is a social impact visionary and go-to-market leader who has 20+ years of experience overseeing communications, global campaigns, nonprofit and product marketing using data-driven market insights to help NGOs and nonprofits meet the challenges of operating today.

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10:15am - 11:30am

Cognitive Impairment in Donors: Are You Prepared?

We are on the precipice of the largest transfer of wealth in human history, with over \$35,000,000,000,000 being dispersed in the coming years. As we age, rates of dementia and other cognitive impairment increases, creating ethical and legal issues for fundraisers when they encounter this with donors. Are you prepared? Eligible for 1.25 ACFRE credits in Leadership or Management

Education Track: Ethics, Accountability and Professionalism

Audience: Applied

## Speakers

Anthony Pomonis, CFRE

Cognitive Empowerment Consulting Group, LLC - Co-founder

Anthony Pomonis, CFRE has spent two-plus decades helping individuals unlock meaningful experiences in their lives. He served as a major gift officer for the University of Illinois and thereafter at the University of Illinois Foundation. Anthony graduated with his B.A. from the University of Illinois at Urbana-Champaign in 2002 and spent fifteen years opening five regional restaurants. He is the co-founder of the Cognitive Empowerment Consulting Group, LLC.

Tara Adams, JD, Ed.M.

Cognitive Empowerment Consulting Group, LLC - Co-founder

Tara Adams has spent her professional career dedicated to education, serving in roles within higher education administration at the Northwestern Pritzker School of Law and the University of Illinois College of Law at Urbana-Champaign in addition to the Judicial Education division of the Illinois Courts. Tara also raises funds as a board member for the Lincoln Park Zoo in Chicago, Illinois. She is the co-founder of the Cognitive Empowerment Consulting Group, LLC.

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Tue, Apr 18, 2023

10:15am - 11:30am

Houston, we have a problem. Ten Reasons Why You Need a Crisis Management Plan.

A good crisis management plan is like insurance. You hope the plan will never be used, but when the need arises, you'll be grateful you have a plan in place. In this session, learn the essential elements of creating a comprehensive plan for your organization. Eligible for 1.25 ACFRE credits in Leadership or Management

Education Track: Leadership and Management

Audience: Strategic

## Speakers

Shelly Maharry, MPA

Community Foundation of Johnson County - President and CEO

Shelly Maharry, MPA is the President and CEO of the Community Foundation of Johnson County, located in Iowa City, Iowa. Prior to her work in philanthropy, she was the Director of Service Excellence and Patient Relations for the

University of Iowa Health Care System. In this role, Shelly advised leadership on the response to adverse events and unexpected patient care outcomes.

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Tue, Apr 18, 2023

10:15am - 11:30am

The Roots Run Deep: Disrupting Institutional Racism & Unethical Behavior As a Leader

Now that you've realized your organization has a history of racism and a culture of unethical behavior, what do you do? What happens when employees, board members, and major donors oppose the disruption of those systems? Learn how to dig deep and strategically uproot these weeds in your organizational culture. Eligible for 1.25 ACFRE credits in Leadership or Management

Education Track: Leadership and Management

Audience: Strategic

Speakers

Christina Allen, JD

FamilyTime Crisis & Counseling Center - Chief Executive Officer

Christina Allen became the Chief Executive Officer of FamilyTime Crisis & Counseling Center in June 2020 and refused to allow the COVID-19 pandemic to prevent her from providing transformational leadership. She has made tremendous strides while leading with equity, fidelity, and integrity. Christina holds a Bachelor of Arts from The University of Texas and a Doctor of Jurisprudence from The University of Texas Law School. She is a member of the AFP Greater Houston chapter.

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Tue, Apr 18, 2023

10:15am - 11:30am

To Infinity and Beyond Moves Management

Do you think fundraising metrics are outdated? Join us to reimagine the fundraising process to meet donor expectations and improve retention! This session will provide tangible ways to incorporate an "infinite donor loop" into your relationship strategies and reimagine metrics that provide mutual benefits to fundraisers and donors alike! Eligible for 1.25 ACFRE credits in Leadership or Management

Education Track: Leadership and Management

Audience: Strategic

Speakers

Benjamin Mohler, ACFRE, CFRE, MA

GivingThree - Chief Executive and Principal Consultant

Ben Mohler is the chief executive and principal consultant of GivingThree. Prior to this he has served in key advancement roles at Kentucky Community and Technical College System, Eastern Kentucky University, University of North Carolina at Charlotte, Cedarville University, and University of Texas at Austin. He completed the philanthropy and development graduate program at Saint Mary's University of Minnesota and has obtained his CFRE, ACFRE, and currently serves on the board of AFP Global.

Andrew Polter, MA, CFRE

University of Cincinnati Foundation - Senior Director of Development, College of Medicine

Andrew Polter, MA, CFRE, serves as Senior Director of Development for the University of Cincinnati Foundation. In this role, he oversees all alumni fundraising for the institution's College of Medicine. Polter most recently served as Director of Development for the UC Foundation, and Associate Director of Development at Eastern Kentucky University. He has additionally served in development roles at Miami University, Boston Lyric Opera, Cincinnati Symphony Orchestra, and the Chautauqua Institution.

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Tue, Apr 18, 2023

10:45am - 11:15am

Learn About AFP 360 with Korn Ferry Advance Program (Learning Lab)

## Speakers

Joshua Daniel

Korn Ferry - Coach and Associate Principal

Josh Daniel is a Coach and Associate Principal consultant with Korn Ferry out of Austin, TX. Josh has been supporting the career coaching offering for AFP360 members and specializes in supporting members in job search strategy, navigating professional transitions, and career advancement. Josh's career is supported by a Master's Degree in Organizational Behavior studies and a professional certification in Executive Coaching from the University of Texas at Dallas.

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Tue, Apr 18, 2023

11:45am - 12:00pm

Updating Your Gift Acceptance Policy for Our Increasingly Digital World (Learning Lab)

Gift Acceptance Policies are a must-have for every organization. But you haven't updated yours since you last looked at your Rolodex? We gotchu. Learn about digital-specific fundraising topics that you want to ensure you are addressing in your Policy.

## Speakers

David Tinker, CFRE, AFP Master Trainer, FAFP

Achieva - Vice President of Advancement

Dave Tinker is Vice President of Advancement at Achieva and is a consultant with Goalbusters. Dave has worked in education, health, and disability nonprofits throughout the Midwest and Mid-Atlantic regions. He was named to the first class of Distinguished Fellows of AFP (FAFP). He is an AFP master trainer and CFRE. In 2013 Dave was honored as AFP Western Pennsylvania Chapter's Outstanding Fundraising Executive and currently serves on several AFP International committees.

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Tue, Apr 18, 2023

12:00pm - 12:15pm

Current Trends in Social Media: What Do We Pay For & What Should We Ignore (Learning Lab)

Meta Verified, Twitter Blue, Snapchat Plus - it seems as if all the big, formerly free, social media platforms are now offering pay-to-play services. What does it mean? What are the implications for the social media landscape? And what are the benefits? Nonprofit digital marketing expert Julia Campbell will walk you through the 3 most critical changes to the social media landscape in the past year, the pros and cons of Meta Verified for Facebook and Instagram, and how data privacy laws continue to affect social media reach and visibility.

## Speakers

Julia Campbell

J Campbell Social Marketing - Digital Storytelling & Social Media

Julia Campbell is on a mission to make the digital world a better place. Through speaking, training, and consulting, she shows social purpose organizations how to use social media and storytelling to build communities, showcase impact, and advance their causes. Her passion is to get organizations and change makers to stop spinning their wheels and start getting real results using digital tools.