



AFP Conference Program

9:00 a.m.

Making the Most of the Great Wealth Transfer & What Steps to Take This Year | Presented by Patrick Schmitt, Co-Founder, FreeWill | *Domain: Donor Research* **ROOM: SALON HI** - Over the next few decades, there will be a historic shift of wealth as older Americans transfer an estimated \$30 to 70 trillion to younger generations as part of the Great Wealth Transfer. In this session, learn what this means for fundraisers and the fundraising strategies nonprofit leaders can adopt in 2024 to prepare for this epic change.

Maximize Stewardship Opportunities in Your Special Event Process | Presented by Heidi Price, Principal, Heidi Price Design | *Domain: Securing the Gift (Special Events)* **ROOM: SALON CD** - Taking advantage of opportunities for stewardship throughout the planning process can enhance your event and create a memorable guest experience for all. Hear vignettes highlighting engagement opportunities throughout planning along with event follow up that ensures successful relationship development, goal achievement and future support by key stakeholders.

Leading with Impact: Trends in the New Landscape of Staffing and Volunteerism in Campaigns
Presented by Sarah Iwanski, Director of Development, The Preservation Society of Newport County; Kim Stone, Director of Development, The Rashi School; Carly Renshaw, AVP, CCS Fundraising; and Kate Villa, Managing Director, CCS Fundraising | *Domain: Securing the Gift (Campaign focus)* **ROOM: WELLESLEY (THIRD FLOOR)** - As campaigns become regular occurrences rather than “once in a generation” opportunity to go above and beyond, what has changed in recent years? Join us for a conversation about campaign, staffing, and volunteer trends informed by CCS’s hot-off-the-press 2024 Pulse Survey results. We will be joined by panelists Kim Stone, Director of Development at The Rashi School, and Sarah Iwanski, Director of Development at The Preservation Society of Newport County, both brilliant leaders that have leveraged these trends resulting in highly successful campaigns.

What We Can Learn from Corporate Social Responsibility (CSR) | Presented by Rebecca Leonard, Managing Director, Purposeful Group and Executive Advisor/Teaching Fellow | *Domain: Corporate and Foundation Relations* **ROOM: SALON JK** - CSR, ESG, CSRD, TCFD, DEIB... these acronyms have become primary for corporations’ social impact strategies and programs, as has the political debate around them. Learn how to navigate the challenges and capitalize on opportunities to get more from your corporate partnerships.

Leaders who Engage their Fundraisers, Retain their Fundraisers | Presented by Anne Lang, Leadership and Organizational Development Consultant and Partner, Leadership Partners | *Domain: Talent Management* **ROOM: SUFFOLK (THIRD FLOOR)** - Besides being comedians, what do Jimmy Fallon, Ellen DeGeneres, and Steve Harvey have in common? And what does that have to do with Employee Engagement? Come find out what the research tells us about what engages employees and helps you retain them.

AI in Fundraising: How to Leverage Artificial Intelligence for Success | Presented by Josh Hirsch, Senior Strategist, Soukup Strategic Solutions | *Domain: Marketing & Comms. Annual Fund* **ROOM: SALON AB** - In today's rapidly evolving digital landscape, organizations are seeking innovative ways to maximize their fundraising efforts. Artificial intelligence has emerged as a game-changer, revolutionizing the world of fundraising and empowering nonprofits to achieve remarkable results. Applicable to anyone in fund development and marketing and communications.

Estate Planning: Tales from the Trenches | Presented by Patricia Annino, Esq., Partner, Rimon Law | *Domain: Planned Giving, Estate Planning* **ROOM: SIMMONS (THIRD FLOOR)** - Join Patricia Annino, Esq., a nationally recognized authority on estate planning, planned giving and taxation. Patricia is a speaker, podcast host, and respected author of several books and articles including *Women and Money: A Practical Guide to Estate Planning*. Ms. Annino's session will offer relevant content on planned giving and the opportunity to apply what you have learned to address real planned giving scenarios with tested strategies.

10:15 a.m.

The Powerful Partnership between Major Gifts & Prospect Research | Presented by Nancy Downer, Assistant Vice President of Principal & Major Gifts, Dana-Farber Cancer Institute and Robby West, Senior Associate Director, Analytics, Dana-Farber Cancer Institute | *Domain: Donor Research, Securing the Gift* **ROOM: WELLESLEY (THIRD FLOOR)** - Learn how a strategic partnership between philanthropy research and major gifts teams can enhance portfolio management and result in larger gifts. This session will cover how Dana-Farber analyzes portfolio sizes, solicitation rates, and outreach metrics.

Why Branding Matters in Fundraising – how aligning your organization's values, aspirations, and desires drives giving | Presented by Daren Bascome, Managing Director, Proverb and Rebecca Sisson, Senior Strategist/Brand Engagement, Proverb | *Domain: Securing the Gift (Case for Support)* **ROOM: SALON CD** - Your brand is so much more than a logo or a tagline. In this session we will dive into defining your brand, and how understanding and aligning with your audiences' values and aspirations can not only build community and brand equity but also drive deeper engagement.

Where Do I Begin? Building a Prospect Pool Toward Major Giving | Presented by Mary Flynn Myers, Co-Founder, Campaign for Catholic Schools and Vice President of Strategy and Development; Marie Louise Greenidge, Interim Head of School and Director of Development, Mother Caroline Academy and Education Center; Paula White, Chief Development Officer, Women's Lunch Place; and Julie Rafferty, Principal, Rafferty Communications Strategies (Moderator) | *Domain: Securing the Gift* **ROOM: SALON AB** - Where do you find new potential major gift prospects? How do you find potential large donors nobody else is finding? And how do you create a culture of philanthropy in your organization so everyone feels invested in helping to identify and steward major gift prospects? Get tips you can use right away from veteran fundraisers who have achieved success in organizations large and small raising more money from a wider variety of large donors.

Women in Philanthropy | Presented by Luciana Bonifacio, Chief Development Officer, Save the Children *Domain: Leadership and Management* **ROOM: SALON HI** - Join Luciana's session to learn about the inspiring power of women's voices and women's united philanthropy. Learn how your nonprofit can adapt this strategy for greater impact. Ms. Bonifacio will share how engaged women philanthropists founded the 100 Strong initiative, how it has evolved and why this sisterhood has succeeded in creating transformative change for children around the world!

Live Polling the Present: Harnessing Real-Time Insights for Fundraising in 2024 | Presented by Matthew Weber, Principal and SVP of Product and Marketing, Development Guild DDI | *Domain: Leadership and Management* **ROOM: SUFFOLK (THIRD FLOOR)** - 2024 promises to be another year of rapid change and unforeseen headlines that will inevitably impact the fundraising landscape. Dive into the most pressing

current events in real-time, powered by live polling, analytics, and cutting-edge AI. While it's impossible to predict the exact topics we'll face months ahead, what we can guarantee is an adaptive, dynamic, and highly interactive session that capitalizes on the collective knowledge of attendees. This session won't just reflect the news, it will position fundraisers to be ahead of the curve, leveraging today's headlines for tomorrow's fundraising success.

Where Have All the Mentors Gone? | Presented by Don Hasseltine, Senior Vice President and Senior Search Consultant, Aspen Leadership Group and David Woodruff, CFRE, Consulting Partner, Marts & Lundy | *Domain: Leadership and Management* **ROOM: SIMMONS (THIRD FLOOR)** - If you are a Millennial or Gen Z fundraiser, this may be the question you are asking. Forces are at work making mentors harder to find and experienced staff less likely to serve in that capacity. The scarcity of mentors poses an enormous threat to professional development. This program will focus on emerging best practices being deployed to counteract today's trends, restore the value of mentoring, and provide advice to those in search of mentors. The session leaders welcome participation from senior and junior professionals alike and look forward to a lively and critically relevant conversation.

Lessons on Leadership - How to Build, Retain and Develop Inclusive Teams | Presented by Denella J. Clark, President and CEO, Boston Arts Academy Foundation; Maureen Flores, CDO, Boston Symphony Orchestra; Morgan Herman, EVP, Development, Cure Alzheimer's Fund; and Paula Sakey, Executive Director, Boston Public Library Fund (Moderator) | *Domain: Talent Management* | **ROOM: SALON JK** - Unlock the keys to effective leadership and team development through this engaging panel of non-profit fundraising leaders. Gain invaluable insights into fostering a culture of inclusivity, cultivating strong teams, and implementing strategies for long-term retention. Audience participation is encouraged as we reflect on how we can equip ourselves with practical tools and knowledge to navigate the complexities of team dynamics.

11:30 a.m.

Keynote Presentation | Presented by Amir Pasic, the Eugene R. Tempel Dean of the Indiana University Lilly Family School of Philanthropy (Grand Ballroom) followed by lunch in the Grand Ballroom

1:20 p.m.

From Cold to Gold: Using Data-Driven Decisions and Creative Engagement Opportunities to Strengthen the Middle of the Donor Pipeline | Presented by Charlotte Ennen, AVP, CCS Fundraising and Patrick Gotham, AVP, CCS Fundraising | *Domain: Donor Research* **ROOM: SALON CD** - Transform your approach to donor pipelines by using qualification protocols and data to identify and cultivate emerging major donors, leveraging innovative engagement strategies to build meaningful connections that lead to significant and lasting support. Participants will come away with tangible tips on how to implement qualification protocols to yield the most impact and how to create tailored and meaningful opportunities to bring prospects closer to your organization.

Perspectives on Major and Transformational Gifts from a Foundation Executive | Presented by Jeremy Cramer, CEO, Exponential Philanthropy | *Domain: Securing the Gift* **ROOM: SALON AB** - Off-the-record conversation with a former fundraising executive turned Philanthropic Advisor. Jeremy Cramer will offer perspective on what it means to create the greatest philanthropic experience for a donor, what the expectations are of a major gifts professional in today's marketplace / how organizations should be investing in professional development of fundraisers, the importance of leveraging art and science to optimize fundraising, and what due diligence looks like on a development team before a foundation will invest.

Forward Focus: Adapting Events for Tomorrow Presented by Liz Page, CFRE, Principal, Liz Page Associates and Amanda Harless, CMP, Executive Producer, Liz Page Associates | *Domain: Securing the Gift (Special Events focus)* **ROOM: SALON JK** - How are you evolving your gala-style events to meet the needs and challenges of today and tomorrow? Explore the changing world of post-pandemic fundraising events with the seasoned team at Liz Page Associates. This session will feature insights recently collected from our development community and will set the stage for our conversation. Be prepared to contribute, connect with peers, discuss your specific challenges, and co-create solutions to shape your events.

Attracting and Retaining Diverse Talent with the Challenges of a Changing World | Presented by Melanie O'Keefe, Senior Consultant, Development Guild DDI and Tracy Marshall, Senior Vice President, Principal, Development Guild DDI | *Domain: Talent Management* **ROOM: SIMMONS (THIRD FLOOR)** - The non-profit sector is teeming with opportunities to attract and retain diverse talent. From community engagement to the crafting of DEI statements, and the showcasing of DEI programming, this session will address best practices to engage and attract diverse voices during the hiring process. We'll also examine the critical resources, training, and the role your employees can play to ensure a welcoming and inclusive environment for your new hires.

Unleashing AI's Potential in Your Fundraising Experience: A Pragmatic Approach to Navigating Promise and Pitfalls | Presented by Anne Hager, Principal, Fundraising Levers | *Domain: Technology, Donor Relations* **ROOM: SALON HI** - In today's ever-evolving landscape, understanding AI is not just an advantage; it's a necessity. Ignorance will risk losing out in a competitive landscape and becoming irrelevant to a donor base that expects highly personalized interactions. If you're committed to embracing the opportunities of AI without losing the human touch, this workshop will serve as your compass and demonstrate relevant use cases.

Trust and Accountability: Current Ethical Challenges | Presented by Mary Doorley Simboski, ACFRE, Managing Director, Changing Our World | *Domain: Ethics* **ROOM: SUFFOLK (THIRD FLOOR)** - The fundraiser's role is to strengthen relationships between organizations and their stakeholders. This interactive session explores the challenges of this responsibility through scenarios and live polling. Mary Doorley Simboski, ACFRE is a leader in the nonprofit sector, educator, and frequent national speaker on philanthropy and ethics, and brings more than 35 years in development to her role. She teaches at Boston University and Bay Path University and serves on AFP's Ethics Committee.

Challenging Conventional Thought in Fundraising | Presented by Elsa Gomes Bondlow of Ripple Acts and Amy Kingman of Amy Kingman Consulting | *Domain: Leadership and Management* **ROOM: WELLESLEY (THIRD FLOOR)** - Candid fireside chat on philanthropic gatekeeping and innovative fundraising strategies. Meet two dynamic and irreverent philanthropic consultants that challenge conventional wisdom. Delve into the intricacies of engaging with high net-worth donors, navigating donation vehicles like Donor Advised Funds (DAFs), networking, building authentic relationships, and overcoming barriers to access. Debunk outdated philanthropic myths and address power dynamics within foundations, emphasizing the importance of diverse perspectives and community-centered approaches.

2:35 p.m.

Prospect Research for Fundraisers | Presented by Emily Donohue, Senior Director, Prospect Management and Research, UMass Boston | *Domain: Donor Research* **ROOM: SUFFOLK (THIRD FLOOR)** - This session is an overview of prospect development: what it is, how it can help fundraisers, and how you can do some basic research in a small shop with no prospect development staff.

Direct Mail Fundraising Best Practices: A Data-Driven Refresher on How to Improve Annual Fund Results | Presented by Sarah Gnerre, CFRE, VP of Philanthropy and Gary Henricksen, President, Five Maples Development Communications | *Domain: Securing the Gift (Annual Giving)* **ROOM: SALON AB** - Reviews compiled, anonymized results from Five Maples' client mailings including all sizes of fundraising shops. Examines what to measure and why; how retention rates for new and returning donors compare to other organizations' retention rates; how donors across organizations respond to elements in your donor communications from appeals, reply forms, and donor newsletters; and how frequently donors expect to hear from your organization.

Relationship Building in Fundraising: Stories of Meaningful and Lasting Donor Connections | Facilitated by Cathi Ianno, Director of Advancement, Global Arts Live and Stephanie Truesdell, Director, Institutional Advancement, Catholic Memorial | *Domain: Securing the Gift (Relationship-building)* | **ROOM: SALON CD** - An interactive discussion about facilitating relationships and making unique connections for your donors that best meet their needs and your organization's goals. Bring your own success stories, as well as tough cases where you'd like a fresh perspective.

The Inside Scoop on Job Seeking and Recruiting | Presented by Lisa Vuona, Managing Partner, Boyden and Anne Norton, Director of Development, Major Gifts, Harvard University | *Domain: Managing Your Career* **ROOM: SALON HI** - From Application to Offer: Myths and Musts for Your Job Search and a conversation about moves management for your career AND tips for hiring managers to recruit the best talent. What do you need to know? How can you recruit and identify key talent? What should you stop doing immediately?

Fundraising in a Small Shop: Practical Tips to Bring in the Most Money | Presented by Melissa Cording, Director of Development, Bridge Over Troubled Waters | *Domain: Small Shop, Leadership and Management* **ROOM: SALON JK** - Small shops have big dreams with small budgets and few resources. Prioritization, efficiency, and strategy are key – all while making sure you are paying close attention to your donors' individual needs. Learn how to plan your time and approach donors in a meaningful way that leads to better relationships and bigger gifts.

Strategic Planning Process and the Case for Support: Lessons and Case Studies | Presented by Maribeth Canning, Principal, Maribeth Canning Consulting, AHP Fellow, Adjunct Faculty Northeastern University, former CDO, VP and AVP MaineGeneral Health, Lahey Health & Dana Farber Cancer Institute | *Domain: Strategic Planning, Small to Mid-Shop, Leadership and Management* **ROOM: WELLESLEY (THIRD FLOOR)** Where does strategic planning and the case for support intersect? How can we leverage strategic planning and the process of writing a compelling case for support to build joint ownership around impact and philanthropy? Learn how these powerful processes create shared responsibility and higher engagement in this interactive session.

It Takes an Organization to Raise Funds: Why Fundraising is Everyone's Job and Where to Start Presented by Jerrell Cox, CEO, United South End Settlements; Ken Phillips, Author, NGO Futures LLC; and Alida Zweidler-McKay, President, ZM Coach | *Domain: Leadership and Management* **ROOM: SIMMONS (THIRD FLOOR)** - In this hands-on workshop, we'll look at why fundraising needs to be everyone's job and what you can do to engage your colleagues, your organization's leadership, and your board members in generating the financial support needed to make your mission a reality. Hear direct experiences from our speakers and then apply them to your own situation, so you walk away with clear next steps.

3:45 p.m.

Building Blocks of an Effective Advancement Services Team | Panelists Kerri Saucier, AVP, Advancement, Boston University and Anne Norton, Director of Development, Major Gifts, Harvard University, with Melissa Cording, Director of Development, Bridge Over Troubled Waters (Moderator) | *Domain: Donor Research,*

Advancement Services **ROOM: SALON JK** - For nonprofits seeking to build, or rebuild, an effective and independent advancement services team, including pointers on best structures and key building blocks.

Making the Ask: Everything You Wanted to Know But Didn't Want to Ask | Presented by Stephanie Truesdell, Director, Institutional Advancement, Catholic Memorial | *Domain: Securing the Gift* **ROOM: SALON CD** - This is an interactive session that covers the skills you need to make a successful solicitation. Learn about the steps that precede an ask, how to make an effective ask, and how to manage objections. Participants will learn from cases that went well and those that didn't and take part in role play to develop and hone their solicitation skills.

Trends in DAF Donor Philanthropy | Presented by Jyothsna Buddharaju, Founder, Buddha Philanthropy and Carlos Byrne, CAP, Head of DAF Services, BNY Mellon Wealth Management | *Domain: Corporate and Foundation Relations, Planned Giving* **ROOM: SALON HI** - Many donors are increasingly turning to DAFs as their giving vehicle. While occasionally criticized for their lack of transparency DAFs have only gained in their popularity and are here to stay. Participants will come away with a better understanding of DAFs, motivations of DAF holders and will learn a few tips on how best to respond to this type of giving.

Get to Yes! with a Donor Activation Framework: Unlock your Data and Unleash your Expertise with MapMoveMeasure™ Beth Saunders, Founder & Chief Strategist, Beth Saunders Associates & Janet Stolfi Alfano, Exec. Director, Diaper Bank of CT *Domain: Securing the Gift, Annual Giving, Small Shop* **ROOM: WELLESLEY (THIRD FLOOR)** - MapMoveMeasure™ provides a data-informed strategic approach to developing longer-term relationships with supporters by harnessing your expertise to create new ways for donors to contribute more and for non-donor supporters to become donors. The framework also includes a guide for measuring engagement so you can more easily get to 'Yes!' by having the right offer for the right people at the right time. This session introduces the vision map and engagement pyramid components, provides the opportunity to start building the framework, and gives space for peer-peer conversations that spark new ideas for increasing supporter engagement.

Maximize The Power of Volunteer Fundraising Presented by Katherine Bahrawy, M.Ed, Associate Director, Event Fundraising, Dana-Farber Cancer Institute and Sarah Eldredge, Assistant Director, Event Fundraising, Dana-Farber Cancer Institute | *Domain: Volunteer Management* **ROOM: SALON AB** - Katherine Bahrawy & Sarah Eldredge from Dana-Farber and the Jimmy Fund's Community Fundraising program will walk you through their tips, tricks, and lessons learned from managing a high performing community fundraising program. Katherine and Sarah will share their insights on program strategy, relationship-building, and retention.