

Nonprofit Fundraisers Symposium *Imagine... Innovate... Impact*

PROGRAM

(As of Feb. 2, 2024 – Schedule subject to change.)

WEDNESDAY, MARCH 20

2:00 PM – 5:30 PM

Registration Open

4:30 PM – 5:45 PM

Corporate Roundtable:

The Agency & Partner Perspective on Navigating AI

Nonprofit Roundtable:

Reframing the Case for Fundraising Investment

6:00 PM – 7:30 PM

Welcome Reception – Everyone is welcome!

THURSDAY, MARCH 21

8:00 AM – 9:00 AM

Continental Breakfast & Conversation Table

Join a Conversation Table focused on a pressing topic or challenge being faced by experienced fundraisers. Come out to hear from your peers, and to share with them your own experiences, ideas, and learnings around a specific topic, question, or challenge. Don't miss this chance to learn about what your peers are thinking! List of table topics coming soon.

9:00 AM – 9:15 AM

Opening General Session Welcome Remarks from the Co-Chairs:

- **Polly Papsadore**, President, PMG
- **John Perell**, Director of Strategy & Member Experience, Smithsonian Institution

9:15 AM – 10:30 AM

Opening Keynote

Unleash the Innovator Within

Diana Kander, A New York Times best-selling author and innovation consultant

Description: You face a volatile external environment. You encounter pressure to stay relevant to customers – you experience challenging workforce issues – and you are being asked to do a lot more with a lot less. All of this is asking YOU to be an innovator – whether or not “innovation” is in your job description. The big question is... Are you doing it the hard way or the easy way? Diana will share the key skills and habits that make innovation easier and a lot more fun. You'll walk away ready to harness the power of curiosity to unlock new possibilities and drive yourself and your team towards ambitious goals.

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10:30 AM – 10:45 AM

Refreshment Break

10:45 AM – 12:00 Noon

Breakout Session Round #1

Session Title: Innovation in the Commercial Sector: What Can Nonprofits Learn and Apply to Fundraising?

- **Mike Ross**, Co-Founder & CEO, Beanstalk Farms
- **Moderator: John Wilburn**, Account Director-Nonprofit Data, Epsilon

Description: Nonprofit leaders are constantly adapting relevant strategies from the for-profit sector, from technology to management techniques, but what about *innovation*? What learnings from B2C and B2B companies around innovation in product development, marketing and sales, customer service, and audience strategies can nonprofits apply to their fundraising and donor relationship efforts?

Session Title: AI Opportunities for Nonprofits: Leveraging AI Tools to Create Scale and Impact

- **Josh Hirsch**, Senior Strategist, Soukup Strategic Solutions, Inc.

Description: As a nonprofit leader you need to be exploring how the many AI tools available can help your operations, community, and fundraising. What are the specific tools available, what is the investment required, what are they used for, and who is using and managing them? AI tools can decrease costs, create capacity, and help initiate work products. Join this session to learn how other nonprofit leaders are using emerging tools in a cost-effective way to create scale and increase their organization's impact.

Session Title: Future-Proofing for a Historic Transfer of Wealth

- **Alison Morse**, Vice President, Philanthropic Consulting, National Philanthropic Trust
- **Kimberley Blease**, Executive Vice President, Blakely Fundraising
- **Evan Linhardt**, Vice President, Private Wealth Management, Bernstein Private Wealth Management
- **Facilitator: Tracy Malloy-Curtis, JD**, Vice President, Legacy Giving, Mal Warwick Donordigital

Description: Over the next 25 years, an estimated \$64-\$85 trillion will transfer to the next generation. Is your nonprofit ready to reach these donors and maximize these fundraising opportunities? Join this panel of experts as they lay out the scenarios, make a case for planned giving, analyze campaign trends, and cover everything your nonprofit will need to do to prepare, from staff training to updating gift acceptance policies.

Session Title: Unpack Your Organizational Culture: What is it exactly and how can you improve?

- **Mikhaela Reid**, Head of Marketing, Doctors Without Borders/Médecins Sans Frontières
- **Jessica Shatzel**, Senior Director, Head of Talent Management, Orr Group
- **Ruth McFarlane**, Chief Advancement Officer, Ms. Foundation for Women

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Description: We've all heard that culture eats strategy for lunch. But what exactly is organizational culture and why is it more important than ever? The attitudes, habits, and behaviors of a group of people define its culture.

How do you define, practice, and continuously improve your organizational culture? The daily interactions among your team members, with your program recipients, donors, clients, suppliers, and other members of your community - what you do every day – is who you are, over and above any general values statement you may posted on your website or in your employee handbook.

Our panelists will dig down into the granular details of their organizational cultures to demonstrate how culture drives productivity and operational effectiveness. They will discuss communicating all aspects of your culture down to every detail, especially in a diverse and hybrid workforce. You'll leave this session with new insights on engaging job candidates, early-in-career employees, and remote staff in your culture, and how diversity, equity, accessibility, and inclusion efforts contribute to your culture's strength and success.

Session Title: How to Run Better Meetings

- ***Sarah Newhall***, Founder & CEO, The Newhall Group, LLC

Description: Meetings seemed to have taken over the workplace. The fact is too much of a good thing can be counterproductive. Learn the fundamental techniques and “hygiene” tips to make your meetings productive, efficient, and enjoyable, whether in person or virtual. Does your meeting have a clear purpose? Is the meeting necessary? What is the ideal meeting size? Do you have a thoughtful agenda and have you shared it ahead of time? Do your meeting members offer different perspectives? Do you structure your discussions to take in and analyze opposing views? What's your follow-up plan after the meeting? We'll also explore different meeting formats and frequencies, including standing meetings, stand-up meetings, 15-minute meetings, and more. Plus, specific techniques to make your virtual meetings more energizing and less exhausting.

12:00 Noon – 1:30 PM

Buffet Lunch and Keynote Panel

Keynote Session Title: Nonprofit Transformation, The Smithsonian Institute

- ***Amanda Nelson***, Managing Director, Orr Group
- ***Robert Spiller***, Assistant Secretary of Advancement, Smithsonian Institution
- ***Becky Kobberod***, Head of Digital Transformation, Smithsonian Institution
- ***Frank Raines***, Board of Regents, Smithsonian Institution

Description: Nonprofits are reimagining themselves as our world is facing major challenges from climate change to societal change. Nonprofits must align their mission to these challenges to be relevant now and for future generations of philanthropy. Smithsonian Institution is leveraging its strategic plan to drive important conversations that affect our country and the world. Hear how this is driving organizational and philanthropic change through digital transformation and the Capital Campaign that will go public in the Fall of 2024.

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1:30 PM – 2:45 PM

Breakout Session Round #2

Session Title: Could Corporate Social Good Make Nonprofits Irrelevant?

- *John Trybus, Ph.D.*, Professor of Social Impact & Executive Director, Center for Social Impact Communication, Georgetown University
- *Tycely Williams, CFRE*, Chief Development Officer, Bipartisan Policy Center

Description: There's no denying that Americans are becoming more socially responsible, especially younger generations. We make an impact by spending our dollars with the greater good in mind: we buy electric cars that are better for the environment; we buy clothes from socially conscious retailers like Patagonia, Bomba, and Pact; we use products because corporations purchase renewable energy, use Fair Trade Certified ingredients, or donate their products to those in need. Does a consumer's broader social consciousness create a stronger culture of philanthropy ... or does it make donating to non-profit organizations seem irrelevant? Will younger donors become more philanthropic as they age, or will they find traditional giving unnecessary? How do we strengthen public trust in nonprofits? Join this session to discuss and debate how the social good movement is an asset—or a detriment—to individual giving.

Session Title: AI Risks for Nonprofits: Ethics, Policy, Data Privacy, Staff Training and More (runs twice)

- *John Robichaux*, Executive Director, UC Berkeley Coleman Fung Institute for Engineering Leadership
- *Matthew Reisman*, Director of Privacy and Data Policy, Centre for Information Policy Leadership (CIPL)
- *Warren Storey*, Senior Vice President, Product Marketing & Insight, Epsilon

Description: Join this panel discussion if your nonprofit organization is currently utilizing AI tools and grappling with issues around ethics, data privacy, organizational policy, staff training, communications to stakeholders around all these issues, and other challenges that continue to surface. Our speakers will share their experiences in effectively launching AI tools and developing the necessary policies and training to create transparency and mitigate risk.

Session Title: Driving Fundraising Innovation Within Your Nonprofit: The In-House Innovation Lead

- *Carla Warner*, Senior Director of Revenue Innovation, Share our Strength
- *Lona Stoll*, Chief Operating Officer and Executive Innovation Counsel, Conservation X Labs (formerly Chief Innovation Officer, CARE)
- *Luke Franklin*, Vice President, Membership, ASPCA

Description: One way to drive innovation in a charity is to hire or assign a person dedicated to making it happen. In this panel discussion of nonprofit innovators, learn about the genesis of the role at their organizations, what these leaders are tasked with, their methodologies around investment, setting goals and objectives, getting stakeholder buy-in, testing ideas and developing pilot programs, building teams, monitoring performance, and rolling out successful projects. Learn from their examples of success stories and lessons learned.

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Session Title: Future-Proofing Your Teams for Change and Disruption

- **Dan Diaz**, Executive Director, East Side House
- **Michael Akin**, President, LINK Strategic Partners
- **Lizabeth Wesley-Casella**, CEO, L-12 Services Corp.

Description: The people-needs of your organization are changing along with your business model. It's time to rethink your staffing models to adapt to the evolving technology and strategic opportunities ahead. This includes succession planning which is key to the continued success of your organization and often overlooked.

Hear from peers who have developed new and flexible approaches to building teams that meet the needs of a growing digital footprint and integrate strategies across fundraising disciplines. Get insights on succession planning at all levels, including senior leadership, management, and specialist roles, all geared towards better serving the mission of your organization now and in the years ahead.

Session Title: You Don't Know Me: Lessons and Updates on Data Privacy (runs twice)

- **Karen Downs**, Senior Vice President, Enterprise Business Operations, American Cancer Society
- **Elyse Wallnutt**, Founder & Principal, Agility Lab Consulting
- **Corey Cutter**, Assistant General Counsel – Privacy Officer, American Cancer Society

Description: Data privacy, donor ethics, and fundraising regulations are ever-changing. How can you manage your organization to stay in compliance while keeping fundraising going? How can you stay up to date on the latest in data privacy, donor ethics, and fundraising regulations without a law degree? Then come join our panel discussion! Learn from the panelists' experiences and get the tips and advice you need to keep your organization on the right side of regulations while still bringing in donors. Don't miss out on this opportunity to up your fundraising game!

2:45 PM – 3:00 PM

Refreshment Break

3:00 PM – 4:15 PM

Breakout Session Round #3

Session Title: Consumer Behaviors Around Money and Impact on Fundraising

- **Michael Scully**, CEO and Co-Founder, BriteVox
- **David Warren**, Principal Director, Subscribed Institute
- **Paul Finley**, Vice President, Enterprise Sales, FlexPay
- **Brad Smith**, AAP, Senior Director, Industry Engagement and Advocacy, Nacha
- **Moderator: Laura Durlington**, Director of Annual Giving, Catholic Relief Services

Description: People's behaviors and attitudes around money are evolving, sometimes rapidly, which will continue to drive changes in consumer and donor thinking and actions. How will this impact fundraising on a larger scale?

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This session will cover many different trends and impacts, including donation incentive strategies like cash prize contests, buy now/pay later offers, subscription market, and sustainer loyalty and retention strategies as these buying/giving approaches mature. Discuss evolving consumer behaviors and justifications around discretionary spending, including credit card debt trends, the rapid decline in check writing and the rise of digital payments, and the latest research on consumer trust in companies and nonprofits.

This will be a jam-packed session with lots of takeaways both strategic and tactical and will also get you to think more strategically about consumer behavior trends on an ongoing basis. Attendees will receive resources for further study.

Session Title: Where We Use AI and Where We Use Humans in Fundraising and Donor Relations

- **David Hall**, Director of Pipeline Development, USA for UNHCR
- **Pat Feeley, MBA, CFRE**, Chief Development Officer, Cystic Fibrosis Foundation
- **Moderator: Sean Olds**, Co-Founder and CEO, boodleAI

Description: As leaders we need to understand how AI is reshaping the fundraising landscape, changing workflows, and impacting donor relations now and in the future. Hear from non-profits that are navigating their way through the integration of AI to advance fundraising while avoiding pitfalls along the way. This will be an interactive dialogue with panelists who will discuss what donors expect in today's digital world, how AI can be harnessed to deliver personalized donor experiences, if donor relations chatbots are in our future, and what KPIs matter most in AI-driven donor relations.

Session Title: There's No Reward Without Risk: Case Studies in High-Risk Creative Breakthroughs

- **Yvonne Gutierrez**, Chief Strategy Officer, NARAL Pro-Choice America
- **Steve Abrahamson**, Vice President, Membership & Advocacy, National Audubon Society
- **Ellen Roeder**, Chief Development Officer, The Livestrong Foundation
- **Moderator: Hayley Berlent**, Founder & CEO, The Additive Agency

Description: There's nothing better than taking a giant risk and having it achieve everything you'd hoped it would. Whether it's a bold new storytelling direction, a unique and daring perspective on current events, design and format techniques outside an organization's comfort zone, or an integrated campaign using unexpected channels, we'll take a look at some of the most striking approaches that paid off. Panelists will discuss how their organizations made the decision to take a big creative swing – or not -- what the outcomes were, and how it has impacted their program moving forward. This session will help you build a case for taking creative risks within your own organization so you can gain the freedom to try something new and achieve bigger wins.

5:30 PM – 7:30 PM

Networking Reception Hosted by Moore

La Vie – 88 District Square, SW, 5th Floor, Washington, DC 20024

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FRIDAY, MARCH 22

8:00 AM – 9:00 AM

Continental Breakfast & Conversation Tables

9:00 AM – 10:15 AM

Breakout Session Round #4

Session Title: Next Generation of Performance Benchmarking

- **Steven Norris, CFRE**, Vice President, Inova Health Foundation
- **Megan Den Herder**, Director, Direct Response Fundraising, Wildlife Conservation Society
- **Stephanie Soriano**, Senior Vice President of Fundraising Analytics, MissionWired
- **Michal Heiplik**, President and Co-Founder, Contributor Development Partnership

Description: Are your current KPIs your best options to understand specific audience target segments like younger donors and planned giving prospects, reinforce the value of your fundraising campaigns, and manage your pipelines?

In this session, we approach the entire individual giving strategy as an ecosystem and hear from panelists who have found new non-standard metrics to better understand fundraising performance and impact.

Session Title: How Decision Science Can Power Your Fundraising

- **Thomas Kurmann**, Vice President, Resource Development, Oxfam America

Description: In this lively and interactive session, you'll explore the latest thinking in decision science and behavioral economics – fields that will change how you think about supporters and the ways they engage with your cause.

The session will draw on the work of Nobel Prize winners Daniel Kahneman and Richard Thaler. You'll see practical examples of how organizations are using decision science techniques. You'll discover what behavioral economics is and what it tells us about how we make decisions, why humans are predictably irrational and what this means for your fundraising, how to use psychology to persuade donors to give, how emotions and the subconscious impact decision-making, and much more.

Session Title: From the Frontlines: Capitol Hill Day Recap & Legislative Update

- **Mark Micali**, Vice President, Government Affairs, The Nonprofit Alliance

Description: Join TNPA's Vice President of Government Affairs, Mark Micali, and a few advocate volunteers for a lively recap of Wednesday's Capitol Hill Day: who we met with, what they shared, and a forecast for critical legislation. We will also have time to discuss other pending federal and state legislation.

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Session Title: Sustainability in Direct Mail Fundraising: How to Design Your Sustainability Road Map and Promote Your Program

- **John Stancik**, Vice President Strategy & Client Services, Grantmail Direct Marketing
- **Joel Kaufman**, Senior Account Executive, DCG ONE
- **Moderator: Polly Papsadore**, President, The PMG Group

Description: Nonprofit organizations are under pressure to be more sustainable in all aspects of their organizations. This session focuses on nonprofit direct mail programs, which use a lot of resources but offer a strong revenue return on investment and serve as a critical pipeline to major and legacy gifts.

Learn about the sustainability initiatives and environmental stewardship practices of several leading direct mail production suppliers, including printing, mailing and logistics companies that work hard to support your direct response fundraising efforts. Find out how their ongoing work and future plans can help you design your own sustainability road map and promote your direct mail program to your leadership, donors, and other stakeholders.

10:20 AM – 11:45 AM

Closing Keynote
Profitable Growth Through Sustainable Innovation
Dave Raley, Founder, Imago Consulting

Description: From the *Myths of Innovation* that leaders should avoid to the *Ancient Roots of Innovation*, and practical lessons from some of the biggest innovators in history and models to follow, Dave will guide nonprofit fundraisers on how to choose the waves to ride.

11:45 AM – 12:00 Noon

Wrap-Up by the 2nd Annual Nonprofit Fundraisers Symposium Co-chairs

- **Polly Papsadore**, President, The PMG Group
- **John Perell**, Director of Strategy & Member Experience, Smithsonian Institution