

# LEADING PHILANTHROPY

## Agenda At A Glance | September 25, 2024

\*Early Development Professional Friendly

Registration: Grand Lobby (at bar)  
Exhibitors: South Ballroom  
Breakfast: South Ballroom

7:30 AM - 8:30 AM	Registration Opens: Breakfast & Networking with Exhibitors	
8:45 AM - 9:00 AM	Welcome and Opening Remarks	South Ballroom
9:00 AM - 10:00 AM	Keynote: <b>Marcy Heim presents Inspire! Connect! Shine ON!</b>	South Ballroom
10:00 AM - 10:15 AM	Break	

10:15 am - 10:45 am	<b>Donor Recognition as a Fundraising Tool Presented by: Karen Singer ; Center Ballroom</b>				
	<b>Franklin Room 1</b>	<b>Franklin Room 2</b>	<b>Franklin Room 3</b>	<b>North Ballroom A</b>	<b>North Ballroom B</b>
10:15 am - 11:15am	<b>The Psychology of Fundraisers</b> presented by: Victoria Wheeler, Momentum	<b>Seeing and Being Seen: The Heart of Philanthropic Culture in Small Shops</b> presented by: Stephen Eberle, Ignatian Volunteer Corps	<b>Get the Meeting and Make It Count: A Guide to (Re-)Qualifying Individual Major Gift Prospects</b> presented by: Lisa Vaccarelli, Delta Plus Partners	<b>Practical Applications of Artificial Intelligence for the Not-for-profit Community</b> presented by: Robert Lane, Lane Services, LLC	<b>Beyond Philanthropy Podcast Live Building Impact Together</b> Presented by: Founders Valerie Johnson and Monique Curry-Mims
11:15 am - 10:45 am	<b>Speed Networking &amp; Refreshment Break with Exhibitors</b>				
10:15 am - 10:45 am	<b>Tax Benefits of Giving During Life and Death Presented by: Sophia Duffy, JD, CPA, AEP®, AVP &amp; James Karthaus, CFP®, CLU®, CHFC®, MA , Center Ballroom</b>				
11:30am - 12:30pm	<b>Be the Change: Motivating Board Members to Fundraise</b> presented by: Mojdeh Keykha, Women's Resource Center	<b>Generative AI in Grant Writing and Fundraising: Practical Uses and Ethical Concerns</b> presented by: Jax Giltzes, Big Brothers Big Sisters Independence	<b>Understanding Endowments: Foundations for Nonprofit Sustainability</b> presented by: Monika Collins, Foundation for Delaware County & Jason Arbacheski, Chester County Community Foundation	<b>5 Ways That Donors Are Changing: And We Must Change With Them</b> presented by: Brian Gawor, JGA & Lisa Greer, Author	<b>Development and Marketing Un-siloed: How Cross-Departmental Collaboration Advances Overall Organizational Goals</b> presented by: Jessica Abel & Orel Uzdavinis, Arden Theatre Company
12:30pm - 1:30pm	<b>Lunch (South Ballroom)</b>				
1:30pm - 2:30pm	<b>Data-Driven Programs: Using Your Own Data to Build More Efficient and Effective Campaigns</b> presented by: Jesse Park, Amplifi & Liz Trout, Christopher & Dana Reeve Foundation	<b>Creating Your Unique Legacy Proposition</b> presented by: Tracy Malloy-Curtis, Mal Warwick Donordigital	<b>From Policy to Philanthropy: Understanding Evolving Legal Frameworks for Charitable Giving.</b> presented by: Emily Wells, CCS Fundraising	<b>Epic Solicitation Fails: What We Learned From Them and How To Avoid Them</b> presented by: Barbara O'Reilly & Katherine Sprissler-Klein, Windmill Hill Consulting	<b>Revving up your Revenue: Tactics for Small to Mid-Sized Teams</b> presented by: Liz Helfner and Renee Archawski, Shultz & Williams
2:30pm -	<b>Speed Networking &amp; Refreshment Break with Exhibitors</b>				
2:45pm - 3:45pm	<b>Gratitude - Your Planned Giving Program's Superpower</b> presented by Kelly Grafton and Greg Wilson, Shultz & Williams	<b>AI for Development Writing</b> presented by: Sarah Pitta Hudson Ferris	<b>Making the Whole Place Shimmer: Turning Fundraising Events into Gold</b> presented by: Leslie Bluestone & Louisa Kopp, Community College of Philadelphia	<b>A Swift Shift Accelerated: Millennial and Gen-Z Impact on Giving and Philanthropy 2.0</b> presented by: Travis Coley, Whitepenny & Amy Henry, Flashlight Insights	<b>Ask for Anything Artfully</b> Presented by: Marcy Heim
4:00pm - 5:00pm	<b>Closing Reception and Meet &amp; Greet with Marcy Heim (Streetlight Bar)</b>				