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LEADING PHILANTHROPY 2022

INnovations in Philanthropy

September 22, 2022



LEADINGPHILANTHROPY.ORG

Welcome to Leading Philanthropy 2022!



On behalf of the Greater Philadelphia, Southern New Jersey, and Eastern Pennsylvania chapters of the Association of Fundraising Professionals, I'm thrilled to welcome you to the second annual and first in-person Leading Philanthropy conference. The conference committee and I are so grateful to have all of us in the same room together after such a long time apart. The last several years dramatically disrupted all of our lives and required us all to become nimble innovators in our work. With that in mind, the committee decided on our theme—innovation in philanthropy. Today, you'll hear from dozens of fundraising practitioners and experts on how they met and adapted to the challenges before them and how we might move forward into a new world that needs our skills now more than ever. And if the last several years have taught us anything, one of the most important skills we have to generate change is our ability to connect with and inspire one another—make sure you get to know as many people doing great things in fundraising as you can today.

Thank you to the committee and boards for all their hard work and commitment to making this conference a success. Thank you to our conference sponsors. And thank YOU for being here with us in the space to learn about, connect with, and celebrate the impact our work has the potential to create.

Elizabeth Marafino Fiola, MA, MS, CFRE
Leading Philanthropy Planning Chair



Dear Friends,

I am pleased to extend my warmest greetings to everyone attending the second annual Leading Philanthropy Conference.

Our conference theme is innovation in philanthropy, and we are thrilled to have Kia Jarmon as our keynote speaker. Kia is an expert in guiding leaders and organizations on a pathway of improvement leveraging the intersection of community, culture, crisis, and communication. We also have a fantastic lineup of speakers for you today ready to share their wisdom and knowledge. Our hope is to inspire and engage each of you.

I would like to commend our planning committee for putting together a program that provides valuable learning and networking opportunities for everyone in attendance. A special thank you to Liz Marafino Fiola, chair of Leading Philanthropy, for her outstanding leadership in guiding our efforts. On behalf of the Greater Philadelphia chapter, I would like to extend special recognition to our conference hosts Southern New Jersey and Eastern Pennsylvania AFP chapters. Lastly, the utmost gratitude to all our conference and chapter sponsors.

I am confident that you will benefit from this conference and will leave inspired to put what you have learned into practice.

With Warmest Regards,
Doris Parent, MBA
President, AFP - Greater Philadelphia Chapter

Join a Committee!

There is no better way to advance your career, learn new fundraising practices, give back to the development profession, share your skills, meet some cool people and have fun, than by volunteering on AFP-GPC Committees! Committees are always accepting new members. To get involved right away, complete the Committee Interest Form with the QR code at right.



Volunteer with AFP-GPC: Get Involved! Get Experience! Get Connected!

LEADING PHILANTHROPY September 22, 2022

AGENDA AT A GLANCE

7:00am - 8:00am	Registration Opens: Breakfast & Networking with Exhibitors					FOYER
8:00am - 8:30am	Welcome and Opening Remarks					GRAND BALLROOM
8:30am - 9:30am	Keynote: Shifting Philanthropy From Charity to Justice					GRAND BALLROOM
9:30am - 9:45am	Break: How to Get the Most Out of Your First Conference					GRAND BALLROOM
BREAKOUT SESSIONS BEGIN						
	Leadership IN Action GRAND BALLROOM	Philanthropy IN Practice ANNENBERG	Prosperity IN Equity SHUBERT	Initiative IN Professional Development FORREST	Technology IN Motion WALNUT	
9:45am - 10:45am	The Importance of Board Diversity and its Impact on Your Organization and Fundraising ...	Unlocking the Power of DAFs ...		5 Ways to Get More Done Before Lunch •	Turning Insight into Action: Using Data to Drive Your Fundraising Strategy •	
10:45am - 11:00am	Speed Networking & Refreshment Break with Exhibitors					FOYER & GRAND BALLROOM
11:00am - 12:00pm	Cultivating Black Leadership and Why It Matters	Fearless Gift Planning ...	Empowering Volunteers as Fundraisers ..	I'm New and I Want to Be Good ..	Ready for Your Next Video for Your Mission? Questions to Answer Before Getting Started •	
12:00pm - 1:00pm	Lunch					GRAND BALLROOM
1:00pm - 2:00pm	50,000 Ft View of Changes in Philanthropy •	Stories from the Road - Major Gifts ...	Harnessing the Power of Public Relations to Increase Fundraising Results ..		Smarter, Faster, Stronger: Leveraging Fundraising Intelligence to Elevate Your Strategy •	
2:00pm - 2:30pm	Speed Networking & Refreshment Break with Exhibitors					FOYER & GRAND BALLROOM
2:30pm - 3:30pm	Our Leadership is Talking About a Campaign. Now What?	Innovation in Special Events •	Integrate or Ignore: Lessons from Community Centric and Donor Centric Voices •	Grants for Newbies: Are You Ready for Grants? What You Need to Know Before You Apply ..	What We Learned From 2021: Major Gifts & AI ...	
3:30pm - 4:00pm	Closing Remarks					GRAND BALLROOM
4:00pm - 6:00pm	Reception					FOYER

Content Level: •••• Advanced
 ••• Mid-career to Advanced
 •• New to Mid-career
 • All

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Debra Bond-Gorr
Chief Development Officer,
Centennial Infant and Child
Centre Foundation

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Conference Tracks

Leadership | **Philanthropy** | **Prosperity** | **Initiative** | **Technology**

Content Level: Advanced ... Mid-career to Advanced .. New to Mid-career · All

Thursday, September 22, 2022

7:00am:

Registration Opens

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7:00am – 8:00am:

Breakfast & Networking
with Exhibitors

FOYER

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UNIVERSITY
College of Professional Studies

8:00am – 8:30am:

Welcome and Opening Remarks

Speaker:

Doris Parent, MBA, President of AFP-GPC and
Chief IDEAS Officer at The Philadelphia Orchestra
and Kimmel Center, Inc.

8:30am – 9:30am:

Keynote Shifting Philanthropy
From Charity to Justice

GRAND BALLROOM

Speaker:

Kia Jarmon

Rev. Dr. Martin Luther King, Jr. said, “Philanthropy is commendable, but it must not cause the philanthropist to overlook the circumstances of economic injustice, which make philanthropy necessary.” Impactful philanthropy requires us to go beyond “charity” for the sake of feeling and looking good. Instead, we must look towards justice which gives space for historical perspective and a framework that rights historic wrongs. Opening speaker Kia Jarmon will charge participants with understanding the importance of justice and liberation in their philanthropic efforts.

9:30am – 9:45am:

Break: How to Get the Most
Out of Your First Conference

Speakers:

Jax Gitzes, MA, Big Brothers Big Sisters,
Independence
Liz Marafino Fiola, MA, MS, CFRE, Villanova
University

9:45am – 10:45am:

Breakout Sessions

**The Importance of Board Diversity
and its Impact on Your Organization and
Fundraising ...**

GRAND BALLROOM

Speakers:

So Jung, MSSP, Schultz & Williams
Jeremy Hildago, Schultz & Williams
Michael Ticzon, CFRE, Comcast NBCUniversal

Learn how board composition can affect your fundraising tactics. Board composition and nonprofit board diversifying is key in helping an organization succeed in achieving its mission, vision and goals. These will be the sub topics presented on:

- 1) Considerations when creating a diverse board.
- 2) Defining diversity in board composition and how that can improve fundraising tactics.
- 3) Recruitment strategy of BIPOC high net worth individuals.
- 4) Engaging case studies to differentiate a diverse board versus a homogenous board.

Unlocking the Power of DAFs ...

ANNENBERG ROOM

Speaker:

Jason Arbacheski, CAP, Chester County Community Foundation

Donor-advised funds (DAFs) have become a growing source of charitable giving in recent years, with payout rates of over 23 percent, far higher than many of America's largest foundations. In fact, McKenzie Scott, former spouse of Amazon founder Jeff Bezos, is able to maximize her philanthropic clout by routing her money through a DAF, rather a foundation (the strategy often employed by previous generations of billionaires).

This course will explain the basics of a DAF, the tax advantages for the donor, and will explain the difference between a private foundation, commercial DAF, and community foundation, along with the latest proposed federal legislation which could impact DAFs in the future. Finally, this course will emphasize how critical it is to identify and engage professional advisors, who are hugely important in the philanthropic planning discussion. Join us for a packed course filled with all you wanted to know about DAFs and how they can benefit your organization.

5 Ways to Get More Done Before Lunch •

FOREST ROOM

Speaker:

Sarah Ohanesian, SO Productive

You are busy! There is an endless to-do list, and your attention and time get spread thin. Imagine if you got out from under your never-ending lists, always knew what to work on next, and reduced your stress!? Learn how to manage your to-dos, set your day up for maximum efficiency, combat distractions, and fight burnout. In this jam-packed session, Sarah will break down simple and actionable steps that make a big impact. Walk away with 5+ easy-to-implement ways to get more done immediately. Hands-on exercises ensure you leave this session equipped to get the right things done before lunch.

Turning Insight into Action: Using Data to Drive Your Fundraising Strategy •

WALNUT ROOM

Speakers:

Jeff Vogel, DonorPerfect

Julia Gackenbach, DonorPerfect

As a nonprofit professional, you know general information about most of your donors. You know that Dawn likes to get mail and that Paul would rather chat on the phone. But do you know general trends and preferences when it comes to your donor base as a group?

In this session, DonorPerfect experts will use real examples to illustrate how data leads to insights, which leads into strategy and action. We will show how gift and donor data can transform your understanding of segments of your supporters, and how that can unlock new strategies to engage with your best supporters and build your community. We will also couple the data information with real fundraising tips and tricks to help you apply data knowledge in everyday development strategies.

10:45am – 11:00am:

Speed Networking & Refreshment Break with Exhibitors

Sponsored by:



Capital Campaign Toolkit
Everything You Need for a Successful Campaign

11:00am – 12:00pm:

Breakout Sessions

Cultivating Black Leadership and Why It Matters

GRAND BALLROOM

Speaker:

Sophia Peake, MPA, Youth Sentencing & Reentry Project

Despite many DEI efforts, Black Leadership is on the decline. It's been two years since America had a racial awakening and many institutions have since taken deep dives into DEI efforts, however, Black professionals continue to report not feeling like they can

bring their full selves to work- what gives? Studies show that diversity in leadership teams increases revenue and improves innovation and outcomes. In the nonprofit sector, having more Black leaders in senior roles lead to increased empathy and an understanding of community needs and where to prioritize funding in order to help populations who are historically marginalized and oppressed.

This presentation puts an emphasis on the importance of cultivating Black leaders and is for organizations who seek to radically shift their cultural landscape and improve diversity challenges. It's for white professionals in Leadership who seek to become [more] culturally aware, and for Black professionals who seek to deepen their leadership journey- no matter where they are- by leaning into being their authentic selves. After this session, you will know how to:

- Help institutions do better at cultivating and retaining Black leadership
- Help organizations go beyond the lip service of diversity, equity, and inclusion
- Empower Black and brown professionals to express their authenticity, own their voice and their power, and be unapologetically true to themselves while embodying leadership — no matter where they are in their career journey.

Fearless Gift Planning ••• **ANNENBERG ROOM**

Speakers:

Kelly Grattan, PhD, MBA, CAP, CFRE, Schultz & Williams
Gregory Wilson, MS, CAP®, CFRE, Schultz & Williams

We all know the best time to launch a robust planned giving program is the day your organization receives its 501(c)(3) status, and we're also very aware that most organizations are long past that time with little to show on the planned giving front. Embracing an "it's never too late" mentality, it's time to face planned giving head-on, with a fearlessness that will jump start even the most nascent planned giving program. In this session, we'll show you the basics PLUS some of the latest,

most innovative approaches, tools, and resources and why you don't need to be fluent in CLTs and CGAs to make this happen for your organization.

Empowering Volunteers as Effective Fundraisers •• **SHUBERT ROOM**

Speaker:

Leigh Ann Bridges, MA, Villanova University

This program will explore the innovative ways that volunteers can interact with donors differently than advancement staff can, and how you can capitalize on that unique relationship to close more major gifts. We will discuss how to identify the best volunteers to fundraise for your organization and give them the tools they need to successfully help build your major gifts program. You'll learn how to identify your volunteers' strengths and make the best use of their skills and time, how to train and empower them as fundraisers, and develop actionable tasks for volunteers to work on. We'll look at best practices to maximize the benefits of your volunteers' efforts and avoid the headaches that sometimes come with volunteer management.

I'm New and I Want to Be Good •• **FOREST ROOM**

Speaker:

Mark Chilutti, CFRE, Magee Rehab – Jefferson Health

Everybody was new once, and often look back later in our careers and say "I wish I knew this sooner." By attending this session, you will learn key tips from a seasoned fundraiser that will move you forward faster. You'll hear about the things you need to learn about your organization, key words and phrases that sound much better than "I'm a fundraiser," and "please make a donation." We'll discuss and develop your "elevator speech," discuss the importance of relationship building, the value of AFP and having a mentor, and more! It will be fast, fun, and engaging, and you will leave with the confidence that is needed to help you better engage with donors and prospects, and the skills to achieve success quicker.

Ready for Your Next Mission Video? Questions to Ask Before Getting Started • WALNUT ROOM

Speakers:

James Copes, Tolsma Productions
Richard Tolsma, Tolsma Productions

Video is an essential fundraising tool. Whether as part of a social media campaign, on your organization's website, or at an event (live OR virtual!) an effective video can make a huge difference in showing impact and raising money. Regardless of whether you plan to hire professionals—or produce your video internally—it's very important that you and your team can answer a few questions before you embark on your next video storytelling project. During this session we'll discuss the "whats/whys/hows" you should consider long before the cameras come out, and cover information that will help you avoid many of the most common pitfalls.

12:00pm – 1:00pm:

Lunch

1:00pm – 2:00pm:

Breakout Sessions

50,000 Ft View of Changes in Philanthropy •

GRAND BALLROOM

Speakers:

Craig Weinrich, Council of New Jersey Grantmakers
Tynetta Brown, Philanthropy Delaware
Mariah Casias, Philanthropy Network of Greater Philadelphia

Believe it or not, the world of philanthropy is changing. Concepts like trust-based philanthropy, equity in grantmaking, multi-year general operating dollars, re-evaluating evaluations, adapting to COVID, disasters, and racial justice, and more are permeating staff and even boards of grantmakers. Lead by staff of three local philanthropy-supporting organizations (Council of New Jersey Grantmakers, Philanthropy Network of Greater Philadelphia, and Philanthropy Delaware), this panel will talk about trends, innova-

tions, and disruptions that have begun to change the grantmaking world. In a safe, and brave space, let's talk about the big trends in philanthropy that fundraisers should know about, so you can engage your funders in new ways, and begin to share power.

Stories from the Road – Major Gifts ••• ANNENBERG ROOM

Speaker:

Julie Fink, MS, CFRE, Jefferson Health New Jersey

Storytelling is a key strategy for fundraising. Stories bring the data to life, they demonstrate cause and effect and they convey relatable messages. So let's hear some stories – stories as a major gift officer. Gain an understanding of the donor engagement process through the narratives of successfully secured major gifts and those that felt flat. This interactive session will offer insight into a prospect vs. a suspect, timing of the ask, navigating meetings that go off track, when a prospect “ghosts” you, and much more.

Harnessing the Power of Public Relations to Increase Fundraising Results ••

SHUBERT ROOM

Speakers:

Liz Hefner, CFRE, Schultz and Williams
Aleah Conlin, MA, Slice Communications

We all know that earned media has the power to lift your organization above the noise. Develop innovative skills, gain best practices, and discover new strategies to ensure that your press releases and media alerts make it to the editor's desk by knowing what is newsworthy and what media is most aligned to communicate your story. We have seen the power wielded by influencers, trust reporters, or valued media outlets in the last decade. Harness this power to lift fundraising results by gaining mentions, event spotlights, or campaign support. Through innovation and applying IDEA principles as a disruptive thought leader raise more funds by adding earned media as one more channel of donor communication above and beyond direct marketing, digital engagements, and event activation. You will

learn from a seasoned fundraising professional and an earned media expert during this workshop. They will provide you with tools, skills, and resources to move beyond the PR basics and have a meaningful impact on your fundraising results.

Smarter, Faster, Stronger: Leveraging Fundraising Intelligence to Elevate Your Strategy •

WALNUT ROOM

Speaker:

Jeremy Davies, iWave

The philanthropic landscape has changed over the past couple years. BIG DATA and TECHNOLOGY are no longer nice-to-haves, but must-haves to achieve your fundraising goals. Have you been able to make the pivot? Are you using technology to identify and engage donors with greater precision and personalization? Join us as we discuss the changing landscape and philanthropic trends that are fueling prospect development and the intelligence you need to elevate your fundraising strategy.

2:00pm – 2:30pm:

Speed Networking & Refreshment Break with Exhibitors

2:30pm – 3:30pm:

Breakout Sessions

Our Leadership is Talking About a Campaign. Now What? ••••

GRAND BALLROOM

Speakers:

Chris Polito, CCS Fundraising
Ken Gosier, CCS Fundraising

It has happened to all of us. Leadership – Executive Director, Board Chair, Head of School, CEO – comes to you with exciting news. Your organization is going to do a campaign. Maybe the campaign will support a "wish list" of priorities. Maybe the campaign will support a new building or program. Perhaps Endowment is the priority. Regardless of what the goal or priorities may be, we know that the first thing to do is to facilitate a Feasibility and Planning Study. Join Chris Polito and Kenold Gosier from CCS Fund-

raising to discuss how to effectively conduct a campaign planning phase to best position your organization for a successful campaign.

Innovation in Special Events •

ANNENBERG ROOM

Moderator:

Valerie Johnson, MBA, CFRE, Pathways To Housing PA

Speakers:

Egypt Graham, MBA, DES, Planning 2 Perfection
Annette Jeffrey, Project HOME

Are your special events struggling, or are you looking for inspiration on how you can creatively update your special events? Join us for a panel discussion moderated by Valerie Johnson, Co-Host of Beyond Philanthropy, with local nonprofit professionals who have come up with innovative special events over the last few years to address the pandemic, the move to virtual events, and other struggles that have faced those hosting fundraising events.

Integrate or Ignore: Lessons from Community Centric and Donor Centric Voices •

SHUBERT ROOM

Speaker:

Robbe Healey, MBA, NHA, ACFRE, FAFP,
Aurora Philanthropic Consulting

Fundraising staff are continuously inundated with advice about how to interpret the organization's missions to maximize fundraising effectiveness.

We are told success requires we:

- tell better stories.
- customize our messages.
- focus on donor priorities.
- focus on community needs.
- commit to diversity, equity, and inclusion in a way that demonstrates our genuine commitment to meaningful DEI, not tokenism.

Who is telling us? How do we listen to so much advice, when some of it is telling us to take opposite approaches? Can you pause long enough to consider all the advice and thoughtfully integrate what will work in your shop today?

Leadership | Philanthropy | Prosperity | Initiative | Technology

Content Level: ••• Advanced •• Mid-career to Advanced •• New to Mid-career • All

Grants for Newbies: Are You Ready for Grants? What You Need to Know Before You Apply ••

FOREST ROOM

Speaker:

Jax Gitzes, MA, Big Brothers Big Sisters, Independence

New to the world of grants? Whether you are brand new to fundraising, or just new to grant funding, this session is for you. Come learn how to prepare your organization for grant funding, where to find the right opportunities, and how to secure and manage your grants from start to finish, with tips and tricks from a seasoned grants professional along the way. In this session we'll cover all the basics of the grants world and give you actionable next steps to take. So come join us and get started raising funds today.

What We Learned From 2021: Major Gifts & AI •••

WALNUT ROOM

Speaker:

Megan Grosskopf, DonorSearch

2021 presented several unique challenges, and the philanthropy trends reported in Giving USA highlighted some dramatic

changes, especially regarding major gifts. In this presentation, we will discuss what we learned from 2021 and how the emerging technology, including AI, is most effective for analyzing this new data so that organizations are focused on the right donors. Attendees will walk away with new insights on philanthropy from 2021, an understanding of how AI works for prospect research strategies, and how to implement it effectively.

3:30pm – 4:00pm:

Closing Remarks

GRAND BALLROOM

Speaker:

Doris Parent, MBA, President of AFP-GPC and Chief IDEAS Officer at The Philadelphia Orchestra and Kimmel Center, Inc.

4:00pm – 6:00pm:

Closing Reception

Sponsored by: **Schultz & Williams**



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The M. Jane Williams Professional Development Award was first announced by L. Scott Schultz, President of Schultz & Williams, at the 2018 National Philanthropy Day Gala Awards Breakfast. Established in memory of Jane Williams, the Award is awarded annually by AFP-GPC to mid-career fundraising professionals in need of financial support for advanced training, conferences, certification, or other professional development activities. The M. Jane Williams Award propels the awardees' careers forward, and in turn, they pick up in small ways where Jane left off by serving the greater Philadelphia philanthropic community.

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Speakers:



Jason Arbacheski, CAP
Chester County
Community Foundation



Leigh Ann Bridges, MA
Villanova University



Tynetta Brown
Philanthropy Delaware



Mariah Casias
Philanthropy Network of
Greater Philadelphia



Mark Chilutti, CFRE
Magee Rehab –
Jefferson Health



Aleah Conlin, MA
Slice Communications



James Copes
Tolsma Productions



Jeremy Davies
iWave



Julie Fink, MS, CFRE
Jefferson Health
New Jersey



Julia Gackenbach
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Jax Gitzes, MA
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Ken Gosier
CCS Fundraising



Egypt Graham, MBA, DES
Planning 2 Perfection



**Kelly Grattan, PhD, MBA,
CFRE, CAP®**
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Megan Grosskopf
DonorSearch



**Robbe Healey, MBA,
NHA, ACFRE, FAFP**
Aurora Philanthropic
Consulting

Speakers Continued



Liz Hefner, CFRE
Schultz & Williams



Jeremy Hidalgo
Schultz & Williams



Kia Jarmon



Annette Jeffrey
Project HOME



Valerie Johnson, MBA, CFRE
Pathways To Housing PA



So Jung, MSSP
Schultz & Williams



Sarah Ohanesian
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Craig Weinrich
Council of New Jersey Grantmakers



Gregory Wilson, MS, CAP®, CFRE
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Use the QR Code below to learn about each speaker!

Schultz & Williams

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Upcoming Events

AFP-GPC 2022 Funders Forum

October 20, 2022 • Asian Arts Initiative, Philadelphia, PA

AFP NJ Southern Chapter – Being Mindful of Our Interactions Through the Lens of IDEA

October 20, 2022 • Virtual Event

CFRE Refresher Course

October 21, 2022 • Virtual Event

AFP NJ Southern Chapter – 14th Annual National Philanthropy Day Awards Ceremony

November 17, 2022 • Virtual Event

AFP-GPC National Philanthropy Day

November 18, 2022 • Crystal Tea Room, Philadelphia PA

AFP NJ Southern Chapter – Stories from the Road: Major Gifts

December 15, 2022 • Virtual Event

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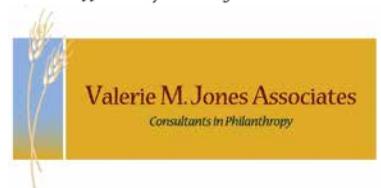
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