



18<sup>th</sup> Annual Bridge to Integrated Marketing & Fundraising Conference EDUCATIONAL PROGRAM |

AMPLIFIED! Fundraising & Marketing

(As of 5-17-2023; Schedule subject to change)

THURSDAY August 3, 2023

	Track 1: Analytics, Data & Strategy	Track 2: Cost Management Strategies	Track 3: Major Gifts & DAF	Track 4: Digital	Track 5: Renewal/Retention Donor Engagement	Track 6: Creative	Track 7: Acquisition	Track 8: Planned Giving	Track 9: Inclusion Diversity Equity and Access	Track 10: Advanced Track	Track 11: Faith & Fundraising	Track 12: BridgeTECH	Track 13: Professional Development   TNPA
Breakout 1 8:45 AM – 9:45 AM	<b>Demystifying Data Warehouses, Data Lakes, &amp; Data Lakehouses - What you Need to Know and How they can Help you Become Better Data-Driven Marketers</b> Karen Engstrom, <i>ROI Solutions</i>	<b>Are You Sure About That? Testing in an Age of Inflation</b> David Allen, <i>Mal Warwick Donordigital</i> Mike Lair, <i>Phoenix Children's Foundation</i>	<b>Moving Your Fundraising Efforts from Transactional to Transformational</b> Karen Kendrick, <i>Veritus Group</i> Joyce MacDonald, <i>Greater Public</i>	<b>YOU Can Have Success Fundraising with YouTube</b> Daniel Williams, <i>Further</i> Jasmin Stuckey, <i>Green Peace</i>	<b>JAMS Collective ("Just About Monthlies &amp; Sustainers"): Early Results Preview</b> Philip King, <i>ST (Stephen Thomas Ltd)</i> Daniella Sretenovic, <i>Alzheimer Society of Canada</i> Joanne Wilson, <i>Humane Society of the United States</i>	<b>Riding the Clutch: Shifting to Performance Creative</b> John Thompson. <i>TrueSense Marketing</i> Stephen Ferrando, <i>TrueSense Marketing</i> Laura Karen Tolstoi, <i>Maryland Food Bank</i>	<b>Data Hygiene &amp; Data Processing: The Basics</b> Karin Haag, <i>MMI Direct</i> Marvin R. Dawson, <i>MMI Direct</i> John Perell, <i>Smithsonian Institute</i>	<b>Legacy Giving – A Slow-Moving Field Speeds Up: New Research on Donor Decision-Making</b> Tracy Malloy-Curtis, <i>Mal Warwick Donordigital</i> Amanda Krauss, <i>CFRE, Sempervirens Fund</i>	<b>Awakening the Sleeping Giant of Latinx Philanthropy</b> Armando A. Zumaya, Jr. <i>Somos El Poder</i>	<b>CEO dish on Managing the Bridge Between Marketing &amp; Development Departments</b> Katrina VanHuss, <i>Turnkey For Good</i> John Lehr, <i>Parkinson's Foundation</i>	<b>Mid-Major Gifts: Fundraising as a Ministry</b> Kristin Priest, <i>MA, CFRE, Pursuant</i>	<b>Influencers: The New Grasstops</b> Paula Dhier Vice, <i>Urban Legend</i> Merrill Hersam, <i>Urban Legend</i> Kaila Novak, <i>TikTok Creator</i>	<b>It's All About You! How to Embrace Your Skills, and Advance Your Career</b> Scott Schultz, <i>Schultz &amp; Williams</i>
Breakout 2 11:30 AM – 12:30 PM	<b>The Fundraiser's Achilles Heel -- The Lack of Effective Revenue Attribution Reporting is Stunting Your Growth Trajectory!</b> Roger Hiyama, <i>Wiland</i> , Patrick Frame, <i>Further</i> ; Shiloh Stark, <i>The Nature Conservancy</i>	<b>10 Building Blocks for Double-Digit Growth of Your Digital Program</b> Amanda Espitia, <i>Concord Direct</i> Michelle Barlak, <i>The Seeing Eye</i>	<b>Digging for Gems: Using Portfolio Reviews and Donor Research to Get to the "YES!"</b> Julie Upham, <i>Conservation International</i>	<b>Emerging Digital Channels: Connecting to Millennials and Gen Z</b> Ellena Fortner Newson, <i>Edge Direct</i> , Jessica Hulsebosch, <i>Shriners Children's</i>	<b>Boosting lifetime value and retention: Using advanced listening techniques to build even deeper relationships with donors</b> Alia McKee, <i>Sea Change Strategies</i> Lori Hutson, <i>Planned Parenthood Federation of America</i> Barbara Camick, <i>MBA, CFRE, Best Friends Animal Society</i>	<b>Donor as "hero" is broken: How to build authentic stories</b> Dan Thain, <i>Blue State</i> Helene Vallone Raffaele, <i>UNICEF USA</i>	<b>Direct Mail is not dying, it's evolving. What to do about it right now</b> Alison Teres, <i>THD Rose</i> Cashner, <i>Feeding America</i> Fran Wollman, <i>AudienceFirst Media</i>	<b>Blended Gifts</b> Pedro J. Rivera, <i>UnidosUS</i>	<b>Building Five- and Six-Figure Strategic Corporate Partnerships that Center Diversity, Equity, &amp; Inclusion</b> Gail S. Bower, <i>Bower &amp; Co. Consulting LLC</i> Kia Croom, <i>Fundraising in Black</i>	<b>Dissecting the Psyche of the American Political Donor</b> Heather Philpot, <i>Moore</i>	<b>Succession Planning for Success: Taking the Steps Now to Be Prepared for the Future</b> Angela White, <i>Johnson, Grossnickle &amp; Associates, Inc</i> Sarah Harris, <i>The Sisters of the Holy Names of Jesus and Mary in Marylhurst, OR</i>	<b>Direct Mail Innovations</b> Craig Depole, <i>Newport ONE</i> , Sheridan Marfil, <i>CARE</i>	<b>Somehow I Manage: Lessons for New Managers by Michael Scott*</b> Jade Nguyen Swanson, <i>MESG Marketing</i> Angela Stoutenburgh, <i>Rainforest Action Network</i>

THURSDAY, August 3, 2023 (continued)

	Track 1: Analytics, Data & Strategy	Track 2: Cost Management Strategies	Track 3: Major Gifts & DAF	Track 4: Digital	Track 5: Renewal/Retention Donor Engagement	Track 6: Creative	Track 7: Acquisition	Track 8: Planned Giving	Track 9: Inclusion Diversity Equity and Access	Track 10: Advanced Track	Track 11: Faith & Fundraising	Track 12: BridgeTECH	Track 13: Professional Development   TNPA
Breakout 3 2:30 PM – 3:30 PM	<b>First Party Data Experiences: Advance Your Digital Now</b> Lianne Raices, <i>RKD Group</i> Michelle Strong, Susan G. Komen	<b>How the Alzheimer’s Association Accelerates Their Impact with Community- Driven Video</b> on Hoffman, <i>Gathering Voice</i> Christopher Masak, <i>Alzheimer’s Association</i>	Stewardship that Stands Out in the Current Competitive Market: Is your organization providing the best bespoke stewardship experience to your high- level individual & corporate donors? Mary Ellen Fraser, <i>Schultz &amp; Williams</i> A. Courtney Dunakin, <i>Brookings Institution</i>	<b>Hey Google - what should I be doing with my paid search?</b> <i>Matt Derby, M + R Joe Coakley, DonorsChoose</i>	<b>Reimagining Donor Engagement in the Post-Pandemic World</b> Kimberley Blease, <i>Blakely Inc.</i> Rachel Hunnybun, <i>Blakely Inc.</i> Alex Tom, <i>March of Dimes Canada</i>	<b>Using Video Storytelling to Bridge Marketing and Fundraising Initiatives</b> Kristin Sukraw, <i>Reliant Studios</i> Renee Gugliotta, <i>Homes for Our Troops</i>	<b>How to greatly reduce F2F attrition in the first three months</b> Kevin Schulman, <i>DonorVoice</i> Monica Muten, <i>Special Olympics International</i>	<b>Major and Planned Gifts - True Case Stories - Lessons Learned</b> Paul B. Seifert, CFRE, <i>Conservancy of Southwest Florida</i>	<b>Expanding Your Circle of Giving to Include the Hispanic Market</b> Zully Avila, <i>Edge Direct</i> Sofia Machado, <i>Operation Smile</i>	<b>Make Better Decisions: how to use decision science to create a measurable, actionable strategic plan</b> Steve Beshuk, <i>Benefactor Group</i>	<b>Beyond Transactions: Measuring Relationships with People</b> Dr. Susan Raymond, <i>Edmundite Missions</i>	<b>The Proliferation of Nonprofit Technology Applications and the Impact of Mergers and Acquisitions</b> Grady McConnell, Raymond James	<b>Be the Leader Your Team Needs</b> <i>Abby Graf, The Nonprofit Alliance</i>
Breakout 4 4:00 PM – 5:00 PM	<b>Surprising Revelations From a Year of Audience Research</b> Gwen McGarry, <i>M+R</i> Stephanie Lauf, <i>Planned Parenthood Federation of America</i> Amirio Freeman, <i>Feeding America</i>	<b>Making the Best of Doing More with Less</b> Courtney Lewis, <i>Fuse Fundraising</i> Dan Ball, <i>Disabled American Veterans</i> Sheridan Marfil, <i>CARE</i>	<b>How to reach donor- advised fund donors</b> Nelle Schantz, <i>Fidelity Charitable</i>	<b>Data-driven content audits (more than just pageviews)</b> Jen Boland, <i>Allegiance Group</i> TJ Peeler, <i>Allegiance Group</i> Madeline Halperin- Robinson, <i>Pathfinder International</i>	<b>When Donors “Flock” to Subscription-Style Annual Giving</b> Shari Grimes, <i>O'Brien Garrett</i> Porter Mason, <i>Stagecoach Digital</i> Daniel Pazos, <i>The National Audubon Society</i>	<b>30 Ideas that WOWed us!</b> Tiffany A. Neill, CFRE <i>Lautman Maska Neill &amp; Co.</i> Allison Porter, <i>Avalon Consulting</i> Mwosi Swenson, <i>Mal Warwick Donordigital</i>	<b>Diving Into Data-Rich Acquisition Strategies</b> Maureen McNally, <i>MissionWired</i> Ashwin Narayan, <i>MissionWired</i> Trista Murphy, <i>Make-A-Wish America</i>	<b>A Plentiful Partnership: How to create a digital pipeline of legacy donor prospects that will impress even the most stubborn skeptics</b> Lee Grant, <i>Lutheran World Relief</i> Nikki Massie, <i>Corus International</i>	<b>A practical plan for executive management of DEI</b> Patti DeBow, <i>ParsonTKO</i> Ron Goines, <i>Movement of Black Lives</i>	<b>Leading Change: Breakthrough’s Don’t Happen Overnight</b> Barbara O’Reilly, <i>Windhill Consulting;</i> T Clay Buck, <i>TCB Fundraising;</i> Patrice Sulton, <i>DC Justice Lab</i>	<b>Following Shifts in Donor Thinking: How do faith-based fundraisers stay relevant?</b> Paul D’Alessandro, <i>High Impact Nonprofit Advisors</i> Scott Koskoski, <i>Caldwell University</i>	<b>The Nonprofit Technology Reckoning: How We Sacrificed Relationships In Favor of Efficiency</b> Adam Miller – Chief Executive Officer & Co- Founder, <i>Instil</i>	<b>The Power of Transformational Leadership</b> Lolly Colombo, <i>BDI</i> Bram Begonia, <i>Bay Area Rescue Mission</i> Brian Tucker, <i>BDI</i>

FRIDAY, August 4, 2023

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Breakout 5 8:00 AM – 9:00 AM	<b>How to Leverage Neuroscience to build more impactful fundraising programs</b> Steve Agauas, Ph.D., <i>Moore Neuro-Fundraising Lab</i> ; Lori Gunnell, <i>Moore</i> ; Diane Clifford, <i>Share Our Strength   No Kid Hungry</i>	<b>Creative Ways to Control Rising Costs Without Sacrificing Results</b> Amy Ricigliano, Eidolon Communications Amanda Cline, National Trust for Historic Preservation	<b>Troublesome Gifts: Not all Matches are Made in Heaven</b> Lori Woehrle, <i>Leapfrog Group</i> ; Rodney Trapp, <i>University of the District of Columbia</i> ; Ally Mennuti, <i>CCS</i> Brynee MacCann, <i>American College of Cardiology</i>	<b>Working with Influencers: How to work with social media influencers to create strong activism and top of the funnel campaigns</b> Catherine Algeri, Do Big Things; Amy Shope Manzi, <i>American Heart Association</i> ; Brooke Betts, Rare	<b>Best Practices in TM and What’s Next!</b> Caroline Mendez, <i>SD &amp; A Teleservices</i> ; Jennifer Minogue, <i>The American Society for the Prevention of Cruelty to Animals®</i>	<b>Change Will Do You Good – With Skill, Grit and Resilience, How IFAW Created Change to Grow the US Direct Mail Program</b> Lisa Smith, <i>Newport ONE</i> ; Diana Estremera, <i>Data Axle</i> ; Robyn Rineer, <i>International Fund for Animal Welfare</i>	<b>Driving Revenue Growth by Transforming the Mid-Level Donor Experience</b> Tyler Hall, <i>MD Anderson Cancer Center</i> ; Eve Smith, <i>Merkle</i>	<b>Communicating with Donors Through the Life of a Capital Campaign</b> Megan Simmons, <i>Benefactor Group</i> ; Emily Alonso-Taub, <i>Center of Science and Industry</i> ; Susan Brekelmans, <i>Benefactor Group</i>	<b>Writing for Progress: How to Write Grants and Tell Stories with an Anti-Racist Lens</b> Calvin Koon-Stack, <i>Spark Point Fundraising</i>	<b>Black Male Development Professionals Panel Discussion</b> Tommy Amal, <i>The Burtin Group</i> ; Terrell White, <i>Center for Nonprofit Excellence</i>	<b>Tried and True Tips for Engaging Hispanic Audiences</b> Mary Anderson, <i>Further</i> ; Andres Gomez, <i>Catholic Relief Services</i>	<b>Build, Buy, or Bandaid - Making Sure Your Tech Stack is Working for You and Not Against You</b> David Schwab, <i>Funraise</i>	<b>Navigating Change</b> Maggie Villegas, <i>Baltimore Creatives Acceleration Networks (BCAN)</i> ; Katy Jordan, <i>TrueSense Marketing</i>
Breakout 6 9:05 AM – 10:05 AM	<b>Leaders, this is how we get started with human-centric AI</b> Meena Das, <i>NamasteData</i>	<b>Philanthropy as a Strategic Investment: A CFO’s Perspective</b> Joseph Budzynski, EVP & CFO, <i>Volunteers of America</i> ; Clare Sherlog, <i>CCS Fundraising</i>	<b>No, You Don’t Need An Elevator Pitch, You Need An Elevator Interview</b> James M. Langley, <i>Langley Innovations</i>	<b>Digital Measurement in a Cookie-less World</b> Jen Boland, <i>BolandSolutions</i>	<b>Texting for Equality with HRC</b> Rachel Kottler, <i>Sage Communications</i> ; Jean Qiao, <i>Lautman Maska Neill &amp; Co.</i> James Perez Servino, <i>Human Rights Campaign</i>	<b>Building—and Maintaining—a Donor Base</b> Barbra Schulman, <i>Faircom New York</i> Diana Lee, <i>Faircom New York</i> Elena Sturman, <i>The Glaucoma Foundation</i>	<b>One (Mid-Level) Size Does Not Fit All - A Tiered Experience</b> Whitney Norman, <i>Pursuant + GivingDNA</i> Libby Pedigo, <i>Community Health Network Foundation</i>	<b>The Anatomy of a Case for Support</b> Lori Woehrle, Immediate Past President, <i>AFP DC</i> , and <i>Leapfrog Group</i>	<b>Cooperative Fundraising for Black-led organizations</b> Starsha Valentine, <i>Purpose Possible</i>	<b>Development and MarComm can Collaborate!</b> Tabitha Glenn, <i>USO</i> ; Adrian White Slagle, <i>USO</i>	Interfaith Lessons for Planned Giving Leaders – Are your congregation’s planned giving efforts struggling? Has it been difficult getting started or maintaining enthusiasm? Jim Murphy, <i>Episcopal Church Foundation</i>	<b>AI vs. Intuition: When to Go With Data, and When to Go With Your Gut in Fundraising</b> Alan Wei, <i>Humanitru</i> Ann Flippin, <i>Austism Society of Central Virginia</i>	<b>Power of Perspective</b> Bessie Thibodeaux, <i>CDR Fundraising</i> Kyla Shawyer, <i>Philanthropy &amp; Fundraising North America</i>

**FRIDAY, August 4, 2023 (continued)**

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Breakout 7 11:20 AM – 12:20 PM	<b>Managing Trust - Ethical Generosity Development</b> Ryan D. Woroniecki, <i>DonorSearch</i> T. Clay Buck, <i>TBC Fundraising</i>	<b>Out-Smart: 10 Cost-Saving Ideas to Deploy in the Face of Rising Costs</b> Lisa Smith, Newport ONE Cindy Barham, RWT Robyn Rineer, IFAW	<b>Predictably Irrational: how to use decision science to transform your fundraising</b> Alan R. Hutson, <i>The Monument Group, Inc.</i> Thomas Kurmann, <i>Oxfam America</i>	<b>Acquisition may be easier than we ever dreamed on Facebook. How are you turning those fundraisers into recurring donors?</b> Megan Rouse, GivePanel Alisha Wilmoth, St. Jude Children's Research Hospital - ALSAC	<b>Wyd? How to make P2P texting your new BFF</b> Jackie Libby, Avalon Consulting Jamie Doughty, <i>The John F. Kennedy Center for the Performing Arts</i> Lauren Sracic, <i>Humane Rescue Alliance</i>	<b>Words That Work: Fundraising Edition</b> Yvonne Garrett, <i>O'Brien Garrett</i> Michelle Ehrhardt, <i>National Audubon Society</i>	<b>Major Donor Match Game</b> Brandon S. Hemel, <i>WETA</i> Karin Kirchoff, <i>K2D Strategies</i> Chris Pabon, <i>Project on Government Oversight</i>	<b>Demystifying the Capital Campaign</b> Martha H. Schumacher CFRE, ACFRE, MInstF, <i>Hazen and Hazen Institute for Leadership Training</i> Jeanne Segal, MPH, Eva Dillon, MPH	<i>To be confirmed</i>	<b>How to Set Up Your CEO and Your Board Chair to Perform Great in their Fund-Raising Roles</b> Alexander Counts, <i>AMC Consulting LLC</i>	<b>Best Things I Learned This Week</b> <i>Hosted by the Catholic Development Council of TNPA</i>	<b>Automate This! 10 Ways Multi-Channel, Automated Donor Journeys Will Change Your Life</b> Maan Sacdalan, Eric Rubin, <i>Engaging Networks</i> , Gabby Green, <i>The Humane Society of the United States</i>	<b>From Baby Boomers to Generation Alpha: Generational Differences in the Workplace</b> Deb Taft, <i>Lindauer</i> Abby Graf, <i>The Nonprofit Alliance</i>