

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

(As of 6-6-2023; Schedule subject to change)

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

THURSDAY, August 3, 2023 (continued)													
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Breakout 3 2:30 PM - 3:30 PM	First Party Data Experiences: Advance Your Digital Now Lianne Raices, RKD Group Michelle Strong, Susan G. Komen	How the Alzheimer's Association Accelerates Their Impact with Community- Driven Video Michael Hoffman, Gathering Voice Christopher Masak, Alzheimer's Association	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, Schultz & Williams A. Courtney Dunakin, Brookings Institution	Hey Google - what should I be doing with my paid search? Matt Derby, M + R Joe Coakley, DonorsChoose	Reimaging Donor Engagement in the Post-Pandemic World Kimberley Blease, Blakely Inc. Rachel Hunnybun, Blakely Inc. Alex Tom, March of Dimes Canada	Using Video Storytelling to Bridge Marketing and Fundraising Initiatives Kristin Sukraw, Reliant Studios Renee Gugliotta, Homes for Our Troops	How to greatly reduce F2F attrition in the first three months Kevin Schulman, DonorVoice Monica Muten, Special Olympics International	Major and Planned Gifts - True Case Stories - Lessons Learned Paul B. Seifert, CFRE, Conservancy of Southwest Florida	Expanding Your Circle of Giving to Include the Hispanic Market Zully Avila, Edge Direct Sofia Machado, Operation Smile	Make Better Decisions: how to use decision science to create a measurable, actionable strategic plan Steve Beshuk, Benefactor Group	Beyond Transactions: Measuring Relationships with People Dr. Susan Raymond, Edmundite Missions	The Proliferation of Nonprofit Technology Applications and the Impact of Mergers and Acquisitions Grady McConnell, Raymond James	Be the Leader Your Team Needs Abby Graf, The Nonprofit Alliance
Breakout 4 4:00 PM - 5:00 PM	Surprising Revelations From a Year of Audience Research Gwen McGarry, M+R Stephanie Lauf, Planned Parenthood Federation of America Amirio Freeman, Feeding America	Making the Best of Doing More with Less Courtney Lewis, Fuse Fundraising Dan Ball, Disabled American Veterans Sheridan Marfil, CARE	How to reach donor-advised fund donors Nelle Schantz, Fidelity Charitable	Data-driven content audits (more than just pageviews) Jen Boland, Allegiance Group TJ Peeler, Allegiance Group Maeline Halperin- Robinson, Pathfinder International	When Donors "Flock" to Subscription-Style Annual Giving Shari Grimes, O'Brien Garrett Porter Mason, Stagecoach Digital Daniel Pazos, The National Audubon Society	30 Ideas that WOWed us! Tiffany A. Neill, CFRE Lautman Maska Neill & Co. Allison Porter, Avalon Consulting Mwosi Swenson, Mal Warwick Donordigital	Diving Into Data-Rich Acquisition Strategies Maureen McNally, MissionWired Ashwin Narayan, MissionWired Trista Murphy, Make-A-Wish America	A Plentiful Partnership: How to create a digital pipeline of legacy donor prospects that will impress even the most stubborn skeptics Lee Grant, Lutheran World Relief Nikki Massie, Corus International	A practical plan for executive management of DEI Patti DeBow, ParsonTKO Ron Goines, Movement of Black Lives	Leading Change: Breakthrough's Don't Happen Overnight Barbara O'Reilly, Windhill Consulting T Clay Buck, TCB Fundraising Patrice Sulton, DC Justice Lab	Following Shifts in Donor Thinking: How do faith-based fundraisers stay relevant? Paul D'Alessandro, High Impact Nonprofit Advisors Scott Koskoski, Caldwell University	The Nonprofit Technology Reckoning: How We Sacrificed Relationships In Favor of Efficiency Adam Miller — Chief Executive Officer & Co- Founder, Instil	The Power of Transformational Leadership Lolly Colombo, BDI Nathan Freeland, Fresno Mission Brian Tucker, BDI

					FRI	DAY, August 4, 2	2023						
	Track 1: Analytics, Data & Strategy	Track 2: Cost Management Strategies	Track 3: Major Gifts & DAF	Track 4: Digital	Track 5: Telefundraising	Track 6: Direct Mail Works	Track 7: Mid-Level	Track 8: Capital Campaign	Track 9: Inclusion Diversity Equity and Access	Track 10: Advanced Track	Track 11: Faith & Fundraising	Track 12: BridgeTECH	Track 13: Professional Development   TNPA
Breakout 5 8:00 AM - 9:00 AM	How to Leverage Neuroscience to build more impactful fundraising programs Steve Agauas, Ph.D., Moore Neuro- Fundraising Lab Lori Gunnell, Moore Diane Clifford, Share Our Strength   No Kid Hungry	Creative Ways to Control Rising Costs Without Sacrificing Results Amy Ricigliano, Eidolon Communications Amanda Cline, National Trust for Historic Preservation	Troublesome Gifts: Not all Matches are Made in Heaven Lori Woehrle, Leapfrog Group Rodney Trapp, University of the District of Columbia Ally Mennuti, CCS Brynee MacCann, American College of Cardiology	Working with Influencers: How to work with social media influencers to create strong activism and top of the funnel campaigns Catherine Algeri, Do Big Things Amy Shope Manzi, American Heart Association Brooke Betts, Rare	Best Practices in TM and What's Next! Caroline Mendez, SD & A Teleservices Jennifer Minogue, The American Society for the Prevention of Cruelty to Animals®	Change Will Do You Good - With Skill, Grit and Resilience, How IFAW Created Change to Grow the US Direct Mail Program Lisa Smith, Newport ONE, Diana Estremera, Data Axle Robyn Rineer, International Fund for Animal Welfare	Driving Revenue Growth by Transforming the Mid- Level Donor Experience Tyler Hall, MD Anderson Cancer Center Eve Smith, Merkle	Communicating with Donors Through the Life of a Capital Campaign Megan Simmons, Benefactor Group Emily Alonso- Taub, Center of Science and Industry Susan Brekelmans, Benefactor Group	Writing for Progress: How to Write Grants and Tell Stories with an Anti- Racist Lens Calvin Koon- Stack, Spark Point Fundraising,	Black Male Development Professionals Panel Discussion Tommy Amal, The Burtin Group Terrell White, Center for Nonprofit Excellence	Tried and True Tips For Engaging Hispanic Audiences Mary Anderson, Further Andres Gomez, Catholic Relief Services	Build, Buy, or Bandaid - Making Sure Your Tech Stack is Working for You and Not Against You David Schwab, Funraise Tony Johnson, The Heritage Foundation	Navigating Change Maggie Villegas, Baltimore Creatives Acceleration Networks (BCAN) Katy Jordan, TrueSense Marketing
Breakout 6 9:05 AM – 10:05 AM	is how we get started	Philanthropy as a Strategic Investment: A CFO's Perspective Clare Sherlog, CCS Fundraising Joseph Budzynski, Volunteers of America	No, You Don't Need An Elevator Pitch, You Need An Elevator Interview James M. Langley, Langley Innovations	Digital Measurement in a Cookie-less World Jen Boland, BolandSolutions	Texting for Equality with HRC Jean Qiao, Lautman Maska Neill & Co. James Servino, Human Rights Campaign	Building—and Maintaining— a Donor Base Barbra Schulman, Faircom New York Sylvie Durand Morris, Faircom New York Elena Sturman, The Glaucoma Foundation	One (Mid- Level) Size Does Not Fit All - A Tiered Experience Whitney Norman, Pursuant + GivingDNA Libby Pedigo, Community Health Network Foundation	The Anatomy of a Case for Support Lori Woehrle, Immediate Past President, AFP DC, and Leapfrog Group	Cooperative Fundraising for Black-led organizations Starsha Valentine, Purpose  Possible	USO Session Tabitha Glenn, USO Adrian Slagle, USO	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, Episcopal Church Foundation	Al vs. Intuition: When to Go With Data, and When to Go With Your Gut in Fundraising Alan Wei, Humanitru Ann Flippin, Austism Society of Central Virginia	Power of Perspective Bessie Thibodeaux CDR Fundraising Kyla Shawyer, Philanthropy & Fundraising North America

					FRIDAY,	August 4, 202	3 (continued)						
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Breakout 7 11:20 AM – 12:20 PM	Managing Trust - Ethical Generosity Development Ryan D. Woroniecki, DonorSearch T. Clay Buck, TBC Fundraising	Out-Smart: 10 Cost- Saving Ideas to Deploy in the Face of Rising Costs Lisa Smith, Newport ONE Cindy Barham, RWT Robyn Rineer, IFAW	Predictably Irrational: how to use decision science to transform your fundraising Alan R. Hutson, The Monument Group, Inc. Thomas Kurmann, Oxfam America	Acquisition may be easier than we ever dreamed on Facebook. How are you turning those fundraisers into recurring donors? Megan Rouse, GivePanel Alisha Wilmoth, St. Jude Children's Research Hospital - ALSAC	Wyd? How to make P2P texting your new BFF Jackie Libby, Avalon Consulting Jamie Doughty, The John F. Kennedy Center for the Performing Arts Lauren Sracic, Humane Rescue Alliance	Words That Work: Fundraising Edition Yvonne Garrett, O'Brien Garrett Michelle Ehrhardt, National Audubon Society	Major Donor Match Game Brandon S. Hemel, WETA Karin Kirchoff, K2D Strategies Chris Pabon, Project on Government Oversight	Demystifying the Capital Campaign Martha H. Schumacher CFRE, ACFRE, MInstF, Hazen and Hazen Institute for Leadership Training Jeanne Segal, MPH, Eva Dillon, MPH	No session	How to Set Up Your CEO and Your Board Chair to Perform Great in their Fund-Raising Roles Alexander Counts, AMC Consulting LLC	Best Things I Learned This Week Hosted by the Catholic Development Council of TNPA	Automate This! 10 Ways Multi- Channel, Automated Donor Journeys Will Change Your Life Maan Sacdalan, Eric Rubin, Engaging Networks, Gabby Green, The Humane Society of the United States	From Baby Boomers to Generation Alpha: Generational Differences in the Workplace Deb Taft, Lindauer Abby Graf, The Nonprofit Alliance



August 2-4, 2023 | Gaylord National Hotel & Convention Center, National Harbor, MD

This year, the Bridge to Integrated Marketing & Fundraising Conference is proud to partner with NonProfit PRO to bring you on **Wednesday, August 2, from 8:30 AM – 4:00 PM** BridgeTECH! BridgeTECH is bringing together technology professionals from the nonprofit sector who are engaged in, and interested in, learning about the latest trends and technological innovations in fundraising and marketing. Just check out the amazing program!

### **BridgeTECH Program Schedule**

Schedule subject to change without notice.

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7:30 AM – 4:30 PM	Registration
9:00 AM – 10:30 AM	Opening General Session with Keynote Speaker Greater than the Sum: A Case for Collective Action Lance Pierce, CEO, NetHope
10:30 AM – 10:45 AM	Refreshment Break
10:45 AM – 11:20 AM	<ul> <li>BridgeTECH Breakouts         <ul> <li>How Nonprofits Use Marketing Automation to Personalize Donor Experiences – Erik Tomalis, Virtuous</li> <li>Nonprofit Email: Data-Backed Insights for Better Engagement – Tim Sarrantonio, Neon One; Cherian Koshy, CFRE, Merit America</li> <li>Selecting Your Nonprofit Technology: A Checklist for Success – Mark Becker, Cathexis Partners</li> </ul> </li> </ul>
10:45 AM – 12:00 Noon	<ul> <li>Data Visualization for fun and (non)profit – Brandon S. Hemel, WETA; Joseph Miscavige, PBS; Emily Courville, The Humane Society of the United States</li> <li>How to Convert Volunteers into (the Strongest) Donors – San Fankuchen, Golden; Brittany Mattfeld Craig, Global Impact</li> <li>Your Digital Infrastructure IS Your Strategic Plan – Katrina A. VanHuss, Turnkey for Good; Jamie Bearse – ZERO: The End of Prostate Cancer; John Thompson, Children's Hospital of Philadelphia; Tami Caesar, National MS Society</li> </ul>
11:25 AM – 12:00 Noon	<ul> <li>Digital Fundraising Strategies: Leveraging Technology for Greater Impact – Aleya Jennings, Fred Rogers Productions</li> <li>Keeping the Love Alive: Optimizing the donor Journey – John Coogan, Charity Engine</li> <li>The Secret to Tech Success is Not Technology (It's People!) – Sally Heaven, Raise HECK; Morgan Bakerman, Vera Institute of Justice</li> </ul>



August 2-4, 2023 | Gaylord National Hotel & Convention Center, National Harbor, MD

12:45 - 1:30 PM

**BridgeTECH Lunch & Keynote** 

The Human Stack – Tired of Bad Data? Focus on Feelings, Not Features

Tim Lockie, CEO & Founder, The Human Stack

1:30 - 2:05 PM

- Al in Nonprofit Fundraising: Key Factors in Selecting and Implementing Al Capabilities – Michael Gorrairán, Arjuna Solutions; Teena Wright, Idaho Public Television, PBS
- Leveraging Technology to Improve Donor Rates *Joshua Meyer, Bloomerang*
- Machine Learning for Nonprofit Marketers Find the Right Constituents & Fuel Your Fundraising – John McCarthy, ROI Solutions; Emily Courville, The Humane Society of the United States; Steve Kehrli, PETA Foundation
- Nonprofit Technology Panel: Platform Selection and Implementation – Mark Becker, Cathexis Partners; Ahsan Masood, The Princess Margaret Cancer Foundation; Thea Zunick, The Jed Foundation; Glen Peck, Lustgarten Foundation: Pancreatic Cancer Research
- Winning the Competition for Connection: The Case for Using Advanced Technologies to Personalize Your Fundraising Practices – Nathan Chappell, DonorSearch AI; Jon Thompson, Children's Hospital of Philadelphia

2:10 - 2:45 PM

- Automation vs. Artificial Intelligence: What's What? Debbie
   Snyder, StratusLIVE
- Breaking Through Resistance: Strategies for Successfully Implementing Technology Innovation in Nonprofits – Mallory Erickson, Mallory Erickson Coaching LLC; Heather Hooper, Dementia Alliance of North Carolina
- Case Study: How a Nonprofit Drove omnichannel Storytelling Through Strategic Partnerships – Susan McMullen, Data Axle Nonprofit; Dana Mills, Marine Corps Scholarship Foundation; Claire Quinn, Marine Corps Scholarship Foundation

2:30 – 2:45 PM

**Refreshment Break** 

2:45 - 4:30 PM

**Closing General Session** 

The Farmlink Project – Aidan Reilly, Co-Founder, Farmlink

6:00 PM - 8:00 PM

Bridge, BridgeTECH, Faith & Fundraising Welcome Reception!



August 2-4, 2023 | Gaylord National Hotel & Convention Center National Harbor, MD

Nõnprofit Alliance

This year, the Bridge to Integrated Marketing & Fundraising Conference is proud to partner with The Nonprofit Alliance Catholic Development Council to bring you on **Wednesday, August 2, from 8:30 AM – 4:00 PM Faith & Fundraising Forum!** As a faith-based fundraising forum, this diverse group of professionals from across the country represent nonprofit organizations focused on fundraising for charitable or religious causes that are founded in and uphold the values and principles of their Christian faith. This includes churches, seminaries, archdioceses, schools, foundations, religious communities, social service agencies and more. Just check out the line-up of speakers and topics!

#### **Faith & Fundraising Program Schedule**

Schedule subject to change without notice.

7:30 AM – 4:30 PM	Registration
7:30 AM – 8:30 AM	Religious Services/Mass
8:30 AM – 9:30 AM	Continental Breakfast
9:40 AM – 10:30 AM	Opening General Session with Keynote Speaker David King, Director, Lake Institute for Faith & Giving, Lilly School of Philanthropy: Religion and Giving: Why is it Important, What's Changing, and What Does that Mean for Fundraisers and Nonprofits?
10:30 AM – 10:45 AM	Refreshment Break
10:45 AM – 11:55 AM	Faith & Fundraising Breakouts by Affinity Groups – a facilitator in each room will guide discussion on challenges, opportunities, reactions and take-aways – Choose one!  So What? Now What? Digging Deeper  Large Organization Fundraisers  Medium Organizations  Small Shop Fundraising  One-Person Development Shop Discussion  Leadership Discussion
12:00 – 1:30 PM	Faith & Fundraising Awards Lunch



August 2-4, 2023 | Gaylord National Hotel & Convention Center National Harbor, MD



1:30 PM -	2.20 DM	
1:30 PIVI —	7:30 PIVI	(.

#### **General Session Panel**

#### **Religious Fundraising The Future of Religious Fundraising**

- Moderated by: Kim Richardson, AVP Client Strategy, Pursuant
- Don Fulford, President/ Chief Executive Officer, Association of the Miraculous Medal
- Willis Turner, Creative Director, Huntsinger & Jeffer
- Ivan Leon, Chief Strategist, Kerux Group
- Amy Braiterman, Vice President, Strategy, Data Axle Nonprofit
- Iván León, Chief Strategist, Kerux Group

2:30 - 2:45 PM

#### **Refreshment Break**

2:45 - 3:55 PM

### Faith & Fundraising Breakouts by Challenge/Opportunity – facilitated conversation and peer consulting exercises

- Your Board's Role in Fundraising
- Crisis PR & Management
- Emerging Technologies
- Hiring, Retaining, and Training Your Fundraising Team
- Multicultural Donors and Staff
- Understanding Generational Differences

4:00 PM - 4:30 PM

**Closing General Session** 

6:00 PM - 8:00 PM

Bridge, BridgeTECH, Faith & Fundraising Welcome Reception!

During the regular Bridge Conference tracks, there will be a Faith & Fundraising Track to continue the focus for Faith-based fundaisers!