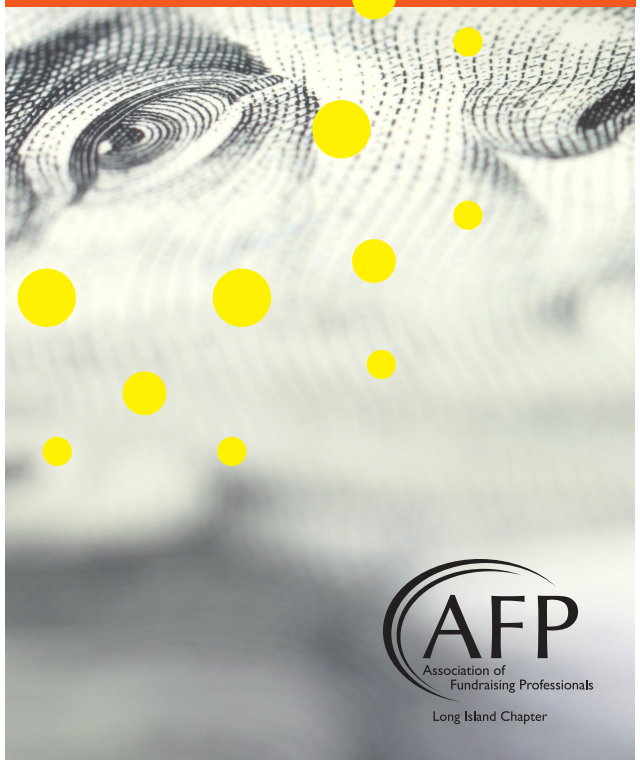
# fundraising forum (fridays)




# fundraising forum (fridays)

Fundraising Forum is back this year virtually, as live online events. The Long Island Chapter of the Association of Fundraising Professionals (AFPLI) is delighted to present a wide variety of educational sessions to educate, encourage and inspire fundraising professionals. Join us for Fundraising Forum Fridays!

Our theme this year, "**Resilience Leads to Success**," is reflective of nonprofit professionals and volunteers and their commitment to their mission during a time when circumstances require great flexibility, creativity and new skills.

Whether you are a seasoned professional or just entering the fundraising profession, Fundraising Forum will be the place to grow your career. This is an opportunity too good to pass up! For the greatest return on investment, take advantage of registering for more than one Friday to get a reduced rate.

Each Fundraising Friday offers a keynote presentation, a panel session and 2 workshop sessions, as well as an opportunity to network and meet exhibitors too! Read on for event schedules and workshop information for each Fundraising Friday.

## daily schedule

| | |
|---|---|
| 8:05 - 8:30 | keynote |
| 8:30 - 8:45 | break |
| 8:45 - 9:45 | panel |
| 9:45 - 10:45 | session 1 |
| 10:45 - 11:00 | break |
| 11:00 - 11:45 | session 2 |

## fees

| | |
|---|---|
| Per day, per person | $ 30 |
| All 3 days, per person | $ 75 |
| Group Rate: 5 individuals from the same organization for all 3 days | $ 300 |

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friday jan 21

# fundraising forum (fridays)

## Creating a Strong Structure for Long Term Engagement

### keynote

Alphonce Brown, Jr. ACFRE

## Donor Retention: How to Keep Your Donors Involved, Engaged and Committed

Every year, most nonprofit donor retention rates hover around 40%. The keynote will address how to increase your donor retention by building a program where donors are engaged and feel directly connected to your mission so they stay longer and give more.

**Alphonce Brown, Jr. ACFRE**
*Director of Development and Alumni Relations*
Stetson University College

### panel

Matthew Campo

Deborah Kneidl

## Engaging Donors in Mission: Your Mission is Your Greatest Saleskit

- How to tell impactful stories
- Using different multimedia tools
- Nurturing new donors
- Stewarding long-time donors
- Unique ways to celebrate your mission

Jeff Eichenlaub

**Alphonce Brown, Jr. ACFRE,** *Moderator*

**Matthew Campo**
*Chief Executive Officer*
Ronald McDonald House Charities New York Metro

**Deborah Kneidl**
*Chief Fundraising Officer*
IGHL Family of Services

**Jeff Eichenlaub**
*Senior Development Officer*
Habitat for Humanity International, New York Region

### workshop 1

Matthew Colson

## Building and Developing Effective Boards

As any nonprofit leader knows, a strong board of directors is critical to an organization's success and long-term resilience. You can set your board members up for success – whether they're brand new or they've been with you for a while – by helping them understand their responsibilities and establishing clear expectations for their role in your organization's governance, work and mission.

**Matthew Colson**
*Vice President for Development and Alumni Engagement*
Farmingdale State College

### workshop 2

Lori Finch

## Monthly Giving Programs

Monthly Giving Programs are a necessary part of a successful fundraising shop and offer many benefits to any size organization. Learn all the basics of how to build a monthly giving program and ways to increase or grow a program you may already have in place.

**Lori Finch**
*SVP Fundraising Services*
iDonate

friday jan 28

# fundraising forum (fridays)

## The Hows and Whys of Legacy Giving

### keynote

Alexandra P. Brovey, JD, LLM

### Legacy Giving: What it means to an organization, what it means to a donor

The keynote will address why people give, why they may choose a legacy gift, and how legacy gifts achieve goals of both donors and the charitable organizations

**Alexandra P. Brovey, JD, LLM**
*Author and Senior Director, Gift Planning*
Northwell Health Foundation

### panel

Meryl R. Cosentino, JD

Jim Meyer

### Legacy Giving: Best Practices

- Qualified Charitable Distributions (QCDs) from IRAs
- Evaluating the quality of your donor base re Planned Gifts
- If you are starting a Planned Giving Program, the importance of "Board Buy In"
- When and if you should use a consultant
- The importance of a Gift Acceptance Policy
- Organization of the office for Legacy Giving
- Marketing Legacy Giving

**Alexandra P. Brovey, JD, LLM,** *Moderator*

**Meryl R. Cosentino, JD**
*Executive Director of Gift Planning*
New York University

**Jim Meyer**
*President,* JEM Planned Giving Solutions
*Associate,* Arnone, Lowth, Leibowitz, and Andriano, Inc.
*Associate,* Greco Planning Group, Inc.

### workshop 1

Stacy B. Sulman, J.D.

### All About Bequests

Bequests and other estate distributions are rarely simple. Each estate has unique challenges. In this session, Stacy discusses some of the key challenges she faces in managing a large pool of active estates, including: problematic gift restrictions; difficult IRA distributions; and real-estate surprises. Stacy will offer tips on running a smooth bequest administration program and handling the bumps along the way.

**Stacy B. Sulman, J.D.**
*Vice President for Personalized Philanthropy and Legal Affairs*
American Committee for the Weizmann Institute of Science

### workshop 2

David M. Okorn

Shawn T. Mroz

### The Other 20%

Donor-Advised Funds have become increasingly popular as they offer ease and convenience for the right type of donor. What are the benefits and drawbacks of donor-advised funds, how do they work, and can they be a funding source for your organization? Explore a number of gift planning techniques that donors, advisors and charities may consider to help donors maximize their giving while achieving philanthropic and other goals.

**David M. Okorn**
*Executive Director*
Long Island Community Foundation (LICF)

**Shawn T. Mroz**
*Senior Advisor, Gift Planning*
Northwell Health Foundation

# speakers fundraising forum (fridays)

**Friday, Jan 21**

## Creating a Strong Structure for Long Term Engagement

**Alphonce J. Brown, Jr., ACFRE** has served on the Board of Directors for both the Guide Dog Foundation and America's VetDogs since 2010. He is currently the Vice Chair Development and also served from 2016-2020 as Vice Chair of Donor Engagement.

He has worked with large established nonprofits, as well as small grassroots organizations for almost 37 years. He also has consulted with local, state and federal governmental agencies and international NGOs. He founded his consulting firm, Docere Consulting, Inc., in 2003. He currently serves as the director of development and alumni relations at the Stetson University College of Law, Gulfport, FL.

Brown was the director of development, National Minority AIDS Council, Washington, DC; vice president, University Advancement of California State University, Dominguez Hills, Carson, CA; president & CEO of the Prairie View A&M University Foundation; assistant dean of External Relations at the College and Graduate School of Business, University of Texas at Austin; and has held senior positions at a number of other nonprofit organizations. He has considerable expertise in the areas of strategic planning, feasibility studies, organizational assessments, board development, volunteer management and fund development.

Brown is a graduate of The University of Texas at Austin, an Advanced Certified Fundraising Executive (ACFRE), and an AFP Master Trainer. He is a past chair of the Association of Fundraising Professionals (AFP)—a 30,000-member global professional organization. He was named one of AFP's 2021 Distinguished Fellows for his significant leadership contributions to the association, philanthropy and the fundraising profession. This designation represents the pinnacle of service to the profession and to the tenets of giving, volunteerism and philanthropy.

**Matthew Campo** is Chief Executive Officer of Ronald McDonald House Charities New York Metro (RMHC NYM) and has been a nonprofit career professional for over 20 years. He joined the RMHC system in early 2009 as the organization's Director of Development and Communications. Matt has focused much of his recent energy on expanding the organization's reach across the New York Metro region, including opening the region's first two Ronald McDonald Family Rooms and overseeing the exploration of a second Ronald McDonald House to serve more families experiencing the pain of having a child in the hospital.

Developing new relationships with unique companies and individuals, raising awareness for the RMHC mission and brand to attract support from diverse members of its community, creatively engaging young donors, and further flourishing existing relationships with those who have supported RMHC programs since the inception of RMHC NYM's first program, the Ronald McDonald House in New Hyde Park are on the forefront for Matt. In addition to his dedicated work in program expansion to serve more families, he fosters a steadfast commitment in his staff to offer support anywhere it is needed within the RMHC organization.

Campo participated in the RMHC Global Advisory Council in 2018 & 2019, a meaningful experience which elevated and redefined his leadership skills as CEO of RMHC NYM. First becoming involved with the group by participating in a special delegation that explored the system's newly formed partnership with IPFCC, Matt has appreciated the opportunity to help shift and shape system perspectives and broaden group discussions in the council's quest for commitment, consensus and compromise. Matt takes tremendous pride in being a conduit for communication within both his local and national region, often capturing opportunities for feedback both one on one with fellow organizational leaders and at the east regional system level.

Before joining the RMHC system, Matt held several fundraising positions at local Long Island nonprofits including those specializing in the Arts, Human Services and Higher Education. He has been a member of the Association for Fundraising Professionals (AFP) for over a decade and previously served in leadership positions, offering his expertise to growing professionals in the nonprofit field in his community. A classically trained vocalist

and avid runner, Matt enjoys a broad range of personal passions with his wife and three children as lifelong residents of Long Island.

**Matthew Colson** is an industry leader in higher education development and alumni relations, building successful operations and programs both in small private college and large public university settings. As Vice President for Development and Alumni Engagement at Farmingdale State College, State University of New York (SUNY), he leads the College's fundraising strategy and the Farmingdale College Foundation Inc., working with the Board of Directors to grow the culture of philanthropy and inspire support among the College's alumni and friends, as well as the corporate community and private foundations. Just finishing his first year at the helm, Farmingdale has re-engineered its fundraising operations which resulted in one of Farmingdale's highest fundraising years to date.

Prior to Farmingdale, Matt was at Stony Brook University for eight years as Executive Director of Alumni Relations, where he was responsible for the transformational growth of the Stony Brook Alumni Association Inc., its revenue and program development for engagement of SBU's 200,000 alumni worldwide. He served on the leadership team during the Campaign for Stony Brook, a $600 million campaign that at the time was unprecedented in the State University of New York (SUNY) system. He started his development career at St. Joseph's College, Long Island.

Matt holds a bachelor's degree from St. Joseph's College and master's degree from Long Island University. He speaks regularly at conferences on the topics of board development, re-engineering operations and programs and work-life harmony.

**Jeff Eichenlaub** serves as the senior major gifts officer for Habitat for Humanity International (HFHI) in the Greater NY region. He spent the first half of his career in the private sector, managing operations and purchasing in the contract food management industry. In 2006, Jeff transitioned to the nonprofit sector and served in various roles at World Vision, including National Director of Workplace Engagement and was responsible for developing innovative partnerships with corporations based on shared value initiatives, employee/volunteering/teambuilding programs, causal marketing, media opportunities, and special events. He also worked closely with individuals and foundations helping them fulfill their philanthropic vision. After leaving World Vision, Jeff served as Managing Director at Better World Consulting, working with companies and nonprofit partners in strategic planning, fundraising, employee engagement and teambuilding events, and helping companies build and communicate their corporate social responsibility platforms. As Vice President of Development for The Resource Foundation, he oversaw corporate giving, individual philanthropy, shared value initiatives, workplace engagement and giving, and causal marketing.

Jeff holds a degree in Social Sciences and Education from the University at Stony Brook, and his passion to help INGO's began when he served on the board of Fundación Exodo, a nonprofit serving children in El Salvador. Additionally, Jeff is currently a bi-vocational Pastor serving True North Community Church and also serves on the board of directors for Mission 500, Christ Calling and Pastor's Lens.

**Lori Finch** has spent the last 15 years helping nonprofits grow their giving, specializing in utilizing digital technology to design campaigns that have raised hundreds of millions of dollars. Currently, she is the SVP Fundraising Services for iDonate and is responsible for developing and maintaining iDonate's relationships with some of the largest organizations nationwide. She has a passion for helping them add new digital tools and campaigns to their toolbox that engage donors and build long-term relationships and impact within communities.

She designed and led the first ever community based, nationwide giving day—Give Local America—and community based endowment building campaign—Endow San Diego. Lori holds an MBA from The University of Chicago, Booth School of Business, and a BSBA in Finance from Georgetown University.

**Deborah Kneidl** has over 28 years of experience and has comprehensive fundraising, marketing, and volunteer management experience, resulting in increased annual gift programs and secured funding for capital projects. With the belief that the key to being successful in philanthropy is based upon understanding and communicating the mission you represent, Deborah has been able to raise $50+ million to advance the goals of several Long Island healthcare and human service organizations. She earned her Master's in Business Administration from Dowling College, is a certified grant writer, and is actively involved in many civic organizations on the east end of the Long Island.

# speakers fundraising forum (fridays)

## Friday, Jan 28

## The Hows and Whys of Legacy Giving

**Alexandra P. Brovey, JD, LLM** is a leader in the philanthropic field with more than two decades of gift planning experience at complex educational and health care nonprofits.

Alex is the Senior Director, Gift Planning at Northwell Health Foundation in New Hyde Park, New York, where she has worked since September 2008. Alex previously worked at The Pennsylvania State University, Pace University and Stony Brook University during comprehensive campaigns. Earlier in her career she focused on estate planning and administration as a member of the Delaware, Pennsylvania and New York bars.

Alex is a President Emeritus and mentor of the Philanthropic Planning Group of Greater New York in New York City. She is a past Board member and Treasurer of the National Association of Charitable Gift Planners and served a 2-year term as Chair of its Leadership Institute. She is also a member of the Estate Planning Council of Nassau County. Alex is a frequent lecturer across the United States on topics related to charitable giving and is on the editorial board of Planned Giving Today.

Alex earned a B.A. from The Pennsylvania State University, Phi Beta Kappa, a J.D. from Georgetown University Law Center, and an LL.M. in Estate Planning from the University of Miami School of Law. Alex has a published trilogy of books focused on Zen and the Art of Fundraising and is writing a young adult book series.

**Meryl R. Cosentino, JD** has more than 30 years of estate and gift planning experience, and is currently the Executive Director of Gift Planning at New York University. Prior to joining the NYU Advancement team, Meryl spent almost six years as the Senior Director of Gift Planning at Stony Brook University and five years as Director of Planned Giving at St. Francis Hospital. Before that, Meryl honed her philanthropic skills at The Nature Conservancy. As a practicing attorney, Meryl specialized in representing parents of children with disabilities, and it was this work (tailoring estate plans to meet the specialized needs of her clients) that sparked her interest in pursuing a career in Gift Planning. Meryl served a three-year term on the CGP Board and was Chair of the CGP National Conference in 2020—the first all virtual conference.

Meryl has been a faculty lecturer at NCPP and is a President Emeritus of the Philanthropic Planning Group of Greater New York (PPGGNY). Meryl received her BA from Indiana University and her JD from Brooklyn Law School, where she was an editor on the Law Review. In her free time Meryl enjoys quilting, baking, and taking spin classes on her Peloton.

**David M. Okorn** has been the executive director of LICF since 2010. He began his career at LICF in 2008 as the Foundation's director of advancement and donor relations. Previously, he was the senior vice president of development and external relations at Abilities, a nonprofit organization dedicated to improving the lives of adults and children with disabilities. Prior to that he held positions as director of community relations at KeySpan and executive director of the KeySpan Foundation. Dave received his B.S. and M.S. in Business Administration and Energy Management at New York Institute of Technology -Old Westbury. He is a member of the board of directors of the Long Island Volunteer Center and the Better Business Bureau Foundation. Dave was recently appointed as a Member of the Long Island State Park, Recreation and Historic Preservation Commission by former New York Governor Andrew Cuomo.

**Jim Meyer** is President of JEM Planned Giving Solutions, Associate at Arnone, Lowth, Leibowitz, and Andriano, Inc., and Associate at Greco Planning Group, Inc. He has over 30 years of experience in the financial services industry and is a leader in the not-for-profit sector because of both his fundraising skills and those skills specific to planned giving. Jim is President, Long Island Affiliate of the Partnership for Philanthropy Planning, The Charitable Estate Planning Council of Long Island. He is a former board member of AFPLI and is past president of The Financial Planning Association (LI) where he was selected for the Howard Black Award for Achievement and Excellence in Financial Planning. Jim was both a former faculty member

and Director of Alumni Relations and Development of Queens College (CUNY). Jim received his bachelor's from SUNY at Brockport and master's degrees from Columbia University and Hunter College. He is a board member of several 501(c)(3) organizations, he teaches and has taught Planned Giving at LIU Post, Hofstra University and Molloy College, and is an AFPLI Gilbert Tilles Award recipient.

**Shawn T. Mroz** is the Senior Advisor, Gift Planning at the Northwell Health Foundation. After a brief career in Finance, Shawn worked in gift planning at several organizations (Vassar College, Columbia University and The Metropolitan Museum of Art) with campaigns ranging from $300 million to $5 billion, before joining Northwell in 2012. He is currently the President of the Philanthropic Planning Group of Greater New York. He has trained numerous colleagues in both large formal settings and individual sessions. Shawn earned his B.A from the College of the Holy Cross in Worcester, MA. He is an alumni interviewer for his high school, Phillips Exeter Academy, and enjoys coaching several of his two sons' sports teams as well as pretending he is a good cook for his family by grilling as much as possible.

**Stacy B. Sulman, J.D.**, is the Vice President for Personalized Philanthropy and Legal Affairs for the American Committee for the Weizmann Institute of Science, where she has worked for over 13 years. In that capacity, among other responsibilities, Stacy oversees planned giving, including the organization's loyalty and legacy societies, estate settlements, and gift annuity administration. Previously, Stacy served as Associate Director and General Counsel for the Jewish Community Foundation of MetroWest, New Jersey.

Stacy teaches Planned Giving at New York University's Heyman School for Philanthropy and Fundraising. She also speaks on various aspects of planned giving to local, regional, and national groups, and has several published articles, including in *Planned Giving Today*. Stacy has also taught at the University of Arizona College of Law. Stacy currently serves as Immediate Past President of the Philanthropic Planning Group of of Greater New York. She has previously served on the Board of Directors of Daughters of Israel Geriatric Center in New Jersey and Goucher College Hillel Board.

Stacy received her JD from the University of Arizona College of Law, and her Bachelor's Degree from Bryn Mawr College. She also spent a graduate year at the Hebrew University of Jerusalem as a Raoul Wallenberg Scholar.

# committee fundraising forum (fridays)

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Hour Children

**Myrnissa A. Stone-Sumair**
Habitat for Humanity
In Nassau County, New York

## Deans, Jan. 21

**Joann Flick**
Diabetes Research Institute
Foundation

**Jennifer Ginsler**
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## Deans, Jan. 28

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JEM Planned Giving Solutions/
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**Judi Lach Veeck**
Cornell Cooperative Extension
of Suffolk County

## Education

**Judi Lach Veeck***
Cornell Cooperative Extension
of Suffolk County

**Pat Chambers Daly***
Hour Children

**Joann Flick**
Diabetes Research Institute
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**Jennifer Gisler**
Guide Dog Foundation

**Jim Meyer**
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**Myrnissa A. Stone-Sumair**
Habitat for Humanity In Nassau County,
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