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BY

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Association of Fundraising Professionals
Greater Lehigh Valley Chapter

2025

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SCHEDULE OF EVENTS

Exhibition Hall

7:30-9:00 a.m. Check-In & Breakfast & Complimentary Headshots

Commonwealth Room

9:00-10:00 a.m. Intro and Keynote: Dr. Stephanie Gripne, Impact Finance

Financing Our Future: Building Local Impact Investing Ecosystems that Work for Communities

10:15-11:15 a.m. SESSION 1

10:15 - 11:15 AM — Commonwealth

CUTTING THROUGH THE NOISE - WHAT'S WORKING NOW TO SPUR DONOR ENGAGEMENT

CHAD BARGER, ACFRE
PRODUCTIVE FUNDRAISING

10:15 - 11:15 AM — Trexler

BALANCE SHEET PHILANTHROPY: TAX-EFFICIENT GIVING STRATEGIES TO MEET DONOR NEEDS AND MAXIMIZE IMPACT

PAUL D'ALESSANDRO
INNOVEST PORTFOLIO SOLUTIONS, LLC

10:15 - 11:15 AM — Wood

ETHICS IN FUNDRAISING (AND GOVERNMENT, AND BUSINESS, AND LIFE)

MEGAN BESTE
TAGGART ASSOCIATES

10:15 - 11:15 AM — Hurd

HOW TO ADVANCE IN YOUR FUNDRAISING CAREER

LINDA LYSAKOWSKI, ACFRE
LEARN WITH LINDA

11:30 a.m.- 12:30 p.m. SESSION 2

11:30 AM - 12:30 PM — Commonwealth

CULTURALLY QUEER: CREATE AN INCLUSIVE CULTURE OF PHILANTHROPY FOR LGBTQIA+ DONORS

MATTHEW EASTERWOOD
QUEER FOR HIRE

11:30 AM - 12:30 PM — Trexler

NAVIGATING THE EITC PROGRAM: APPLYING FOR AND MANAGING EDUCATIONAL IMPROVEMENT ORGANIZATION DESIGNATION

JULIE ZUMAS
LEHIGH VALLEY GRANT SERVICES LLC

CHRISTINA SCHOEMAKER
VALLEY YOUTH HOUSE

11:30 AM - 12:30 PM — Wood

PLANNUAL GIVING - A PLANNED GIVING PROGRAM FOR EVERYONE

MOLLY DRISCOLL
LEHIGH UNIVERSITY

GREG WILSON
PLANNED GIVING MARKETING

11:30 AM - 12:30 PM — Hurd

COMMUNICATE WITH CONFIDENCE AND CONVICTION TO BUILD OUR NETWORK

KATIE IORIO
DALE CARNEGIE

12:40-1:40 p.m. LUNCH & NETWORKING

12:40 - 1:40 PM — Trexler Building a Healthy & Sustainable CGA Program Panel Discussion **STEPHEN LINK** *CORNERSTONE ADVISORS ASSET MANAGEMENT, LLC* **MARISSA ZONDAG, DAVID HAMMER, LORRAINE WIEDORN, ANGELA OSTE**	12:40 - 1:40 PM — Hurd The Power of Partnership: Nonprofits and DAF Donors in Action **CARRIE NEDICK** *LEHIGH VALLEY COMMUNITY FOUNDATION* **WINSTON ALOZIE, RAYMOND SANTIAGO, MICHAEL FISCHER, MARC RITTLE, DONNA TAGGART**

1:45-2:45 p.m. SESSION 3

1:45 - 2:45 PM — Commonwealth Financial Storytelling: Four Chapters to Make You a Best Seller **TISHA HYTER** *PNC BANK* **MEGHAN BAKER** *TURNING POINT OF LEHIGH VALLEY*	1:45 - 2:45 PM — Trexler Stick Figure Capital Campaigns; Understanding the Components of a Successful Capital Campaign **GREG WILSON** *STICK FIGURE FUNDRAISING, LLC* **CASSIE MESKO** *STICK FIGURE FUNDRAISING, LLC*
1:45 - 2:45 PM — Wood Know Your Donor Better: Understanding Financial Trauma **BRENDA RIEHL** *THRIVE FUNDRAISING*	1:45 - 2:45 PM — Hurd Market Research Fundamentals for Philanthropic Organizations **DOUG KEITH** *FUTURE RESEARCH CONSULTING*

3:00-4:00 p.m. SESSION 4

3:00 - 4:00 PM — Commonwealth Deepening Donor Relationships: New Strategies to Make Meaningful Connections **ELIZABETH HEFNER** *SCHULTZ & WILLIAMS* **KELLY GRATTAN** *SCHULTZ & WILLIAMS*	3:00 - 4:00 PM — Trexler Creating an Epic Team: The Science of People **REBECCA "BEKA" SHEA** *CULTURE INDEX*
3:00 - 4:00 PM — Wood The Allentown Warming Station: A Case Study in Centering Community Solutions to Leveraging Diverse Dollars **KATE COHEN** *RIVER CROSSING YMCA*	3:00 - 4:00 PM — Hurd Less Time, More Impact: Automating Donor Stewardship for Greater Engagement **LISA BRAND** *MORAVIAN UNIVERSITY*

KEYNOTE ADDRESS
9:15-10:00AM

Financing Our Future: Building Local Impact Investing Ecosystems that Work for Communities

What if your community held all the capital it needed to fund its future—and just needed help unlocking it? Dr. Stephanie Gripne, founder and executive director of Impact Finance Center, will share her actionable framework for building local impact investing ecosystems that mobilize capital with and for community. Dr. Gripne will show how nonprofit community organizations and for-profit social ventures can move beyond grants and transactional fundraising toward strategic partnerships with values-aligned donors and local investors. By centering the capital needs of local people and businesses, communities can develop the financial mindsets, tools, and investment vehicles needed to address the issues that matter most—right where they live.

Dr. Stephanie Gripne As Founder and CEO of Impact Finance Center, Stephanie is the creative force behind the National Impact Investing Marketplace with a goal to catalyze $1 Trillion in investment capital into social ventures by replicating and scaling infrastructure that was piloted in Colorado. By providing nonconflicted education, Impact Finance Center identifies, educates, and activates individuals and organizations who want to become impact investors and develops community infrastructures such as Impact Days (an impact investing marketplace), Impact Investing Institute, Who's Who in Financial Innovation & Impact Investing (directory), Impact Investing Giving Circles (investor accelerators), and Impact Investor Collectives (investor clubs). The three-year pilot CO Impact Days has resulted in over 70 new impact investors, sourced over 550 social ventures, and catalyzed over 260 direct impact investments totaling $300M to date.

SESSION 1
10:15-11:15AM

Cutting Through the Noise - What's Working NOW to Spur Donor Engagement

Chad Barger, ACFRE , Productive Fundraising. Relationship Building

Join fundraising master trainer, Chad Barger, ACFRE, ACNP, for a workshop focused on proven ways to capture donor attention. We'll look at the challenge of cutting through the noise in today's daily communication onslaught and the importance of donor retention. Attendees will learn simple, actionable steps that they can take to boost donor engagement at their organization. Examples will be shared of creative ways that real life nonprofit organizations identified, cultivated, solicited and stewarded their donors (including some that had no budget for doing so).

Chad Barger helps nonprofit professionals fundraise more efficiently and effectively. He is the chief strategist and owner of the firm Productive Fundraising, which focuses on bringing actionable, research-based fundraising tactics to small and mid-sized non-profits. He is a top-rated conference speaker and webinar presenter as well as a master trainer of nonprofit boards that "don't want to fundraise." He teaches fundraising at both Temple University and Messiah University and is one of only 117 fundraisers in the world to achieve the Advanced Certified Fund Raising Executive (ACFRE) credential. Chad is also a strategic advisor and coach to many non-profit fundraisers, executive directors and board members.

Balance Sheet Philanthropy: Tax-Efficient Giving Strategies to Meet Donor Needs and Maximize Impact

Paul D'Alessandro, Innovest Portfolio Solutions, LLC. Current and Prospective Donor Research

Dr. Russell James of Texas Tech University studied over 10,000 U.S. nonprofits with annual giving exceeding $104 billion and discovered that just 0.74% of donors contribute over 76% of all gifts. With 30+ years of nonprofit experience, Innovest Vice President Paul D'Alessandro will share how educating these major donors on giving appreciated assets can lead to more significant gifts with greater tax efficiency. This seminar will reveal why Balance Sheet Philanthropy is a win-win for both the donor and your nonprofit.

Paul D'Alessandro, J.D., CFRE, is a Vice President at Innovest with 30+ years of experience in philanthropy. He has raised over a billion dollars for nonprofits and led a strategic management consulting company. An expert in nonprofit and business sectors, Paul has worked with global philanthropists to negotiate their strategic gifts. A sought-after speaker, he has presented at top conferences and authored "The Future of Fundraising: How Philanthropy's Future is Here with Donors Dictating the Terms." Paul holds a BBA from the University of Notre Dame and J.D. from St. John's University School of Law. He serves on the NonProfit PRO Advisory Board.

Ethics in Fundraising (and Government, and Business, and Life)

Megan Beste, Taggart Associates. Ethics, Accountability and Professionalism

She did what? Before you make a decision that could end up on the front page, take 45 minutes to consider what ethics really means, how to create guidelines and rules that help with decision making (if you aren't issued any in an employee handbook), and review case studies that illustrate various aspects of ethics. Making an ethically questionable decision can permanently affect a reputation. Don't accept that gift from a donor or sponsor before considering all of the ethical implications.

Megan Beste advises corporations and supports initiatives that positively impact the lives of our neighbors, including: government relations and advocacy; outreach and community relations; external affairs; philanthropy; and corporate social responsibility. Her background as a district director for a Member of Congress that served as ranking member of the House Ethics committee led to thoughtful consideration whenever tickets to events were offered and ultimately, lots of "going dutch."

How to Advance in Your Fundraising Career

Linda Lysakowski, ACFRE, Learn With Linda. Leadership and Management

What are your career goals--moving up in your organization, moving to a different organization, becoming a consultant? How do you know when you are ready for a move? What steps can you take to advance your career-networking, speaking, writing? What tools can help you with each of these steps? Finding and being a mentor!

Linda is one of slightly more than 100 professionals worldwide to hold the ACFRE designation. She has helped her clients raise more than $100 million over her forty-year career in development, and has trained more than 10,000 professionals in Egypt, Canda, Mexico, and many states in the United States, in addition to her online courses and trainings. She holds a master's degree on theology from the Franciscan School of Theology at University of San Diego. She has published approximately forty books and is currently working on several more. In addition to her writing, she edits books for other professionals. She has presented at the AFP ICON and Hemispheric conferences in addition to national and regional conferences of CASE, AHP. and numerous other nationwide organizations. Early in her career she served on the board of the Easter PA chapter of AFP, and serves on the research Council of AFP International.

SESSION 2
11:30 AM-12:30 PM

Navigating the EITC Program: Applying for and Managing Educational Improvement Organization Designation

Julie Zumas, Lehigh Valley Grant Services LLC, Christina Schoemaker, Valley Youth House. Securing the Gift

If you work for an organization who currently is, or would like to become, approved as an Educational Improvement Organization through the PA Educational Improvement Tax Credit (EITC) program, then this is the presentation for you! During our time together, you will learn:

• An overview of the EITC program;

• Eligibility requirements;

• How to receive and apply donations from approved businesses;

• Requirements and record-keeping;

• How to prepare and submit initial and renewal applications.

Participants will have the opportunity to ask specific questions as it relates to their organization throughout this informal and interactive presentation.

Julie C. Zumas is a seasoned fundraising professional who has secured millions in funding for organizations across the Greater Lehigh Valley since 2012. With a master's degree in public health from George Washington University and additional credentials in psychology and business administration, she brings a multifaceted approach to her work. A certified Professional Fundraising Counsel for Pennsylvania, Julie has over a decade of experience as a grant writer and manager. She is an active member of the Grant Professionals Association and the National Grants Management Association, demonstrating her dedication to advancing philanthropy and effective grants management.

Christina J. Schoemaker serves as the Senior Vice President of Advancement for Valley Youth House, a $50+ million dollar human services agency that annually serves over 17,000 homeless, foster care, and vulnerable youth and families across 16 counties in Pennsylvania. Christina is responsible for leading the fundraising, marketing, communications, and public relations efforts to create, maintain, and grow effective Agency programming that includes housing, counseling, life skills training, and prevention, health, and intervention services. Under Christina's leadership, Valley Youth House has increased the annual fundraising operations by 1,329% and raised over $125 million dollars in private and public revenue since 2014.

Communicate with Confidence and Conviction to Build Our Network

Katie Iorio, Dale Carnegie. Relationship Building

Effective communication is a powerful tool for leaders and fundraisers. We often hold ourselves back or criticize our performance after important conversations or meetings. Let's change that narrative, leverage our experience, and communicate with confidence! This approach helps us meet people with ease, build stronger relationships, and add value to our organizations.

Join this interactive workshop to explore our strengths as communicators, relationship builders, and fundraisers. By incorporating Dale Carnegie's proven techniques, such as building trust, projecting enthusiasm, and communicating clearly, you will leave equipped to enhance your fundraising efforts and make a lasting impact.

Katie Iorio is the President of the Dale Carnegie Franchise in southeastern Pennsylvania and Delaware. She leads a globally recognized team, partnering with clients on leadership development, talent management, and cultural alignment. Her franchise, a certified Woman-Owned business, is one of the largest and most awarded globally. Katie, a Certified Dale Carnegie Trainer, received the 'One Carnegie Award' in 2024, voted by her peers. She is the Past President of the International Dale Carnegie Franchise Association, the incoming Board Chair for The Power of Professional Women, and actively serves on multiple advisory councils.

Plannual Giving - A Planned Giving Program for Everyone

Molly Driscoll, Lehigh University & Greg Wilson, Planned Giving Marketing
Relationship Building

Whether you work in a large development shop or if you are the shop, planned giving is important and will only continue to grow in importance as you seek to build sustainability for your organization. Join us to learn practical strategies and tips and how to begin incorporating planned giving practice right away in all areas of fundraising with what we Plannual Giving. It is not as complex as you may think.

Molly Driscoll has been supporting the mission of Lehigh Valley not for profits for over 20 years as a development professional. Currently, she serves as Assoc. Director, Planned Giving at Lehigh University. In this role she manages a portfolio and alumni and friends guiding them as they decide how they want to create their legacy at the university. Additionally, she oversees all planned giving marketing and supports internal team education related to planned giving opportunities. She also serves as a board secretary for the Greater Lehigh Valley AFP Chapter and as a board member for the Southern Lehigh Youth Baseball program.

Greg Wilson: In his nearly 25 years of frontline fundraising and managing frontline fundraisers, Greg has served in various leadership positions - such as Chief Development Officer and Director of Leadership Gifts & Planned Giving - but he's also had jobs where he's had to process his own gifts and maintain the organization's database. Greg has been involved in multiple capacities across a growing number of capital, comprehensive, and endowment campaigns. He's led or been instrumental in planning and providing infrastructure for campaigns ranging from $3M to $100M+. Greg is a certified Fundraising Executive (CFRE), a Chartered Advisor in Philanthropy (CAP®) from the American College of Financial Services, and has earned a MS in nonprofit management from Eastern University and a BA in history from Lebanon Valley College.

Culturally Queer: Create an Inclusive Culture of Philanthropy for LGBTQIA+ Donors

Matthew Easterwood, Queer For Hire. Securing the Gift

Diverse organizations make 19x more revenue than their less diverse counterparts. So how diverse is your culture of philanthropy? Are donors walking away with their dollars because your fundraising plan looks right past them? This session will discuss how nonprofits and fundraisers can create a culture of philanthropy that is diverse and inclusive of LGBTQIA+ donors -- philanthropists of all levels who are left out the conversation because their identity is not understood or ignored.

Matthew Easterwood (he/they), CAP®, CFRE is the Founder and CEO of Queer For Hire, providing fundraising support to Queer nonprofits and LGBTQIA+ cultural competency trainings to straight-led organizations. He is a Chartered Advisor in Philanthropy and Certified Fund Raising Executive with 12 years in nonprofit management and a decade as a professional fundraiser advancing Queer organizations. Matthew specializes in engaging the LGBTQIA+ community, development strategy, individual and family fundraising, establishing a culture of philanthropy, board development, and donor communications. Matthew is the President Elect for the Golden Gate Chapter of the Association of Fundraising Professionals for 2025. Learn more about Matthew and Queer For Hire at QueerForHire.com.

LUNCH SESSION
12:40 PM-1:40 PM

Building A Healthy & Sustainable CGA Program Panel Discussion

Stephen Link (Cornerstone Advisors Asset Management, LLC), Marissa Zondag (Moravian University), David Hammer (Lehigh University), Lorraine Wiedorn (Lehigh University), Angela Oste (Cornerstone Advisors Asset Management, LLC). Leadership and Management

The decision to undertake starting a Charitable Gift Annuity (CGA) Program should be made after careful consideration of the administrative and regulatory requirements, costs, liabilities, and stewardship necessary to ensure a successful programs. This panel conversation, with ample opportunity for questions from attendees will tackle topics from start up considerations, ongoing marketing, administration, risk mitigation, and approaches to enhance the opportunity for donors to terminate the CGA early to release the remainder for the charitable mission.

Steve joined Cornerstone in 2021 as Director of Philanthropic Services working with individuals and non-profit organizations. Steve assists individuals exploring the role of philanthropy in their overall financial plans, and helps charitable entities build effective planned giving programs. Steve began his career in 1985 with Price Waterhouse and then spent 30 years working predominantly in the area of gift planning, assisting donors in building strong financial foundations for higher education and health care. Steve is the past Senior Philanthropic Advisor for Georgetown University where he worked for 15 years. At Lehigh University, Steve served as Director of Principal Gifts and Assistant Treasurer over a 12-year career, before being named Vice President of Advancement for St. Luke's Hospital & Health Network. Over the past three decades, Steve served on the boards of the Lehigh Valley Community Foundation, Historic Bethlehem Partnership, Lehigh Valley Chamber Orchestra, and the organizing committee for the Lehigh Valley Philanthropy Institute. In addition, Steve has spoken on aspects of gift planning, estate planning, and endowment management for a variety of organizations. Steve earned a B.S. in Accounting & Finance, and an M.B.A. from Lehigh University; and a M.A. in European Civilization from Katholieke Universiteit, Leuven, Belgium. In his spare time, Steve enjoys reading, gardening, running, cycling, travel and the performing arts.

Marissa Zondag serves as the Director of Development at Moravian University. In her role, she oversees a team of leadership gift officers, leads the Legacy Giving program and Women's Philanthropic initiatives, including Moravian's first women's philanthropic group, and raises major gifts. She has spent her entire professional career in nonprofits, working in health care and in arts and culture prior to transitioning to higher education in 2016.

Outside of Moravian, she is the President of the Friends of the Mounted Police Board of Directors, sits on the executive committee for the Alumni Board at Moravian Academy, and serves as Membership Co-Chair on the Association of Fundraising Professionals Eastern Chapter Board.

David Hammer was appointed Lehigh University Treasurer effective January 1, 2020, and also serves as the Treasurer of the Board of Trustees. In this role, Hammer manages and leads the treasury management, while overseeing operating investments as well as endowment accounting and reporting. He works with the senior leadership team on various issues related to planning, operations and compliance. Since joining the University in 2000 Mr. Hammer has served in various financial roles, providing leadership and strategic guidance within the university. In addition, Mr. Hammer has been a member of various committees that address accounting issues, compliance and Lehigh's retirement plans. He also attends and supports the Finance Committee, Audit Committee and Investment Subcommittee for the University. Hammer is also an active member of the Rising Tide Loan Fund Board and former member of the United Way of the Lehigh Valley Investment Committee

Mr. Hammer received his degree from the University of Scranton and is a Certified Public Accountant.

Lorraine S. Wiedorn CAP®: Assistant Vice President of Planned Giving and Family Philanthropy, Lehigh University (Ret.), Lorraine is an accomplished fundraising professional with expertise in planned giving, special campaigns and principal and major gifts. She is a 40-year fundraising veteran who started her career at Lehigh University as Assistant Director of Corporate and Foundation Relations, moved to major gifts, and then 25 years ago started as Associate Director of Planned Giving. She has spent her career helping individuals find meaningful ways to support the university. During her tenure she helped secure significant support for Lehigh through planned gifts and blended gifts. She has a demonstrated ability to build strong relationships with key university stakeholders, uncovering their passions and connecting them with the appropriate university initiatives. In May of 2021, Lorraine was charged with expanding her role to build a family philanthropy program at Lehigh that capitalizes on the many multi-generation Lehigh families that are members of the Lehigh alumni body. Lorraine received her BA in Political Science and French from Albright College in Reading, PA and her MA in Government from Lehigh University.

Angela Oste is a Principal of Cornerstone Asset Advisors Management, LLC and serves as the Director of Planned Giving and Director of Insurance Operations.

As the Director of Planned Giving, Angela is the main point of contact for Cornerstone's not-for-profit clients helping them to manage their life income gifts. She and her team closely analyze trends across programs to help educate clients on best practices and areas of improvement. She assists with gift design, reporting and monitoring of asset pools.

As the Director of Insurance Operations, Angela helps clients think through ways to protect and preserve their assets by implementing insurance plans tailored to meet each client's needs.

Angela is a graduate of Millersville University and has been with Cornerstone for 15 years.

The Power of Partnership: Nonprofits and DAF Donors in Action

Carrie Nedick (Lehigh Valley Community Foundation), Donna G. Taggart (Taggart Associates), Winston Alozie (Boys and Girls Club of Bethlehem), Raymond Santiago (Hispanic Center Lehigh Valley), Michael Fischer (Client 1st Financial), Marc Rittle (New Bethany). Relationship Building

Join us for an engaging panel discussion on the power of partnerships between nonprofits and donors, particularly those with donor-advised funds (DAFs). This session will feature nonprofit leaders and their donor partners, sharing real-world insights on cultivating meaningful relationships, navigating DAF dynamics, and aligning donor interests with organizational goals. Attendees will gain practical strategies for deepening donor engagement, fostering trust, and driving greater impact through collaboration. Whether you're a nonprofit professional or a donor, this session will provide actionable takeaways to strengthen relationships and amplify your philanthropic efforts. Don't miss this opportunity to learn from inspiring partnerships in action!

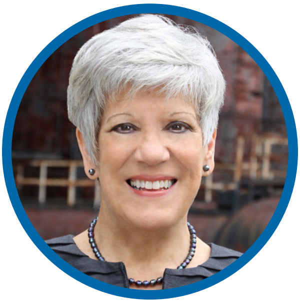
Carrie Nedick, CAP®, is a philanthropic professional at the Lehigh Valley Community Foundation, specializing in donor engagement, family philanthropy, and impact investing. With her Chartered Advisor in Philanthropy® (CAP®) designation, she helps individuals and families create meaningful, lasting charitable legacies. Passionate about strengthening communities through philanthropy, Carrie works closely with donors to align their giving with their values. Her background in music brings a creative and thoughtful approach to her work, fostering strong relationships and innovative solutions that support the Foundation's mission.

Raymond Santiago is the Executive Director of Hispanic Center Lehigh Valley with over a decade of leadership in nonprofit and human resources. He previously held fundraising roles at United Way of the Greater Lehigh Valley and United Way of Bucks County. A Lehigh Valley Business "Forty Under 40" honoree, he serves as a Trustee for The Foundation for the Bethlehem Area School District and Bethlehem Chamber. He is dedicated to advancing equitable health and education outcomes. Santiago holds a B.A. in Business Management from Moravian University and formerly served on HCLV's Board of Directors.

Winston Alozie is the CEO of the Boys & Girls Club of Bethlehem, where he leads efforts to expand youth programming, strengthen community partnerships, and provide vital resources to local children and families. Under his leadership, the organization has grown its membership and introduced innovative initiatives like the "Community Classroom," which supports students facing educational challenges. Committed to fostering a safe and enriching environment, Winston works to ensure that every child has access to mentorship, academic support, and leadership opportunities. His vision focuses on empowering Bethlehem's youth and creating a lasting impact on the community through strategic collaboration and outreach. Michael Fischer

Michael J. Fischer is the President and CEO of Client 1st Financial, which he founded in 2011. With over 35 years of investment planning experience, he holds multiple professional designations and has earned top industry honors. A Lehigh Valley native, Michael is deeply involved in community service. He has served on the New Bethany Ministries Board since 2017, currently as President, and is a member of the United Way Tocqueville Society, Valley Youth House Board of Governors, and Kutztown Lions Club. Recognized with the Melvin Jones Fellowship Award, he is dedicated to strengthening his community through volunteerism and leadership.

Marc Rittle is the Executive Director of New Bethany Ministries, a nonprofit in Bethlehem, PA, dedicated to combating homelessness, poverty, and food insecurity. With a career rooted in social impact, he previously held leadership roles at United Way in Chicago and the Greater Lehigh Valley, focusing on grant-making and community initiatives. Under his leadership, New Bethany has expanded services, addressing the rising demand for housing, financial case management, and food assistance. Passionate about systemic change, Rittle advocates for affordable housing solutions and eviction mediation. He remains committed to fostering self-sufficiency and dignity for individuals and families in need.



Donna G. Taggart has over 40 years of experience in economic development. She began her career as Director of Administration for Lehigh Valley Industrial Park and later served as Executive VP of Bethlehem Economic Development Corporation, overseeing major redevelopment projects. She also played a key role in transforming the Easton Economic Development Corporation into the Greater Easton Development Partnership. Through Taggart Associates, she has led initiatives in urban revitalization, fundraising, and community outreach, including work with Wind Creek Bethlehem. She holds a B.S. in Business Administration from Cedar Crest College and serves on several nonprofit boards supporting community growth.

SESSION 3
1:45 PM-2:45 PM

Know Your Donor Better: Understanding Financial Trauma

Brenda Riehl, Thrive Fundraising. Ethics, Accountability and Professionalism

The topic of money can be charged with emotions. The Trauma of MoneyTM approach offers tools for overcoming trauma and thriving financially. This session will help fundraisers understand the financial trauma that they and their donors might be experiencing, enhancing their ability to build trust, make meaningful connections, and raise money.

Brenda Riehl: After more than 23 years in leadership and fundraising in a variety of nonprofits, Brenda created Thrive Fundraising and now offers consulting that empowers organizations to achieve their strategic and fundraising goals. In 2024, she added Trauma of MoneyTM certification to expand understanding of and support folks in healing from financial trauma.

Her social work education informs Brenda's approach of focusing on the people whose lives are impacted by strategy and fundraising. Thrive Fundraising's philosophy is to foster inclusion, diversity, equity, and access (IDEA) in all aspects of its work.

Market Research Fundamentals for Philanthropic Organizations

Doug Keith, Future Research Consulting. Leadership and Management

Appropriate for all levels Market research (also known as Insights) can be somewhat intimidating to those unfamiliar, but invaluable when making critical decisions across multiple departments in organizations. Focus groups, in-depth interviews, ethnographies, simple and complex surveys, and advanced analyses all have their place in guiding decision-making. Designed for those who are relatively new to the area of market research, Doug will explain – in easy-to-understand language! – the fundamental principles and approaches to market research and how they can be leveraged in the philanthropic space.

Doug Keith has more than 30 years of experience in the research industry, doing both quantitative and qualitative work. As the president and founder of Future Research Consulting, Doug continues to be passionate about finding the story in the data, helping clients discover trends and insights they can use to build their businesses and focus on better serving their customers. He also loves helping people find their career path, whether through informal chats or as a co-founder of the Insights Career Network (ICN), a career networking group created specifically for the insights industry.

Financial Storytelling: Four Chapters to Make You a Best Seller

Tisha Hyter, PNC Bank & Meghan Baker, Turning Point of Lehigh Valley
Securing the Gift

Financial Storytelling allows nonprofit organizations to communicate their past, present and future through a financial lens. It will highlight your impact with data and numbers; demonstrate transparency of your current state; and quantify what's needed to achieve your goals and vision for the future. PNC Nonprofit Strategy & Solution Group presents this advanced four-step process to help nonprofit leaders learn how to successfully share the fiscal value of supporting your organization with potential funders. For current or future Executive Directors, Finance Leaders and/or Board Chairs.

Tisha Hyter, CSRIC®, is a director of nonprofit strategy for PNC Institutional Asset Management. In this role, she helps enhance nonprofit client relationships through direct engagement by providing customized guidance. Using her knowledge of the nonprofit sector, she works directly with market teams and nonprofit clients in variety of areas including investments, governance and operational best practices, distribution strategies and philanthropic planning. As part of the Nonprofit Strategy & Solutions Group, she also contributes to thought leadership, presents at client events and works with key stakeholders in the community to promote PNC's commitment to the nonprofit sector.

Meghan Baker serves as the Director of Advancement at Turning Point of Lehigh Valley, leading fundraising, donor relations, and strategic growth initiatives to support survivors of domestic and intimate partner abuse. Holding a B.A. in Sociology with a focus on Applied Social Research, she applies data-driven strategies to strengthen community engagement, philanthropy, and advocacy efforts. Meghan specializes in nonprofit development, corporate partnerships, and mission-driven storytelling, leveraging research and relationship-building to drive meaningful change. Dedicated to survivor-centered services, she works to secure funding that sustains and strengthens critical programs, ensuring continued support for those in need.

Stick Figure Capital Campaigns; Understanding the Components of a Successful Capital Campaign

Greg Wilson, CFRE, CAP® & Cassie Mesko, Stick Figure Fundraising, LLC
Leadership and Management

You've seen the power of using a stick figure to understand planned giving - now see this transformative methodology applied to capital campaigns! For most organizations, a capital campaign is the largest project they'll work on, engaging the entire fundraising team, other staff, and often a significant number of volunteers. But, campaigns don't have to be scary - learn the components of a successful campaign and how to achieve them by thinking about a stick figure.

Greg Wilson, CFRE, CAP® In his over 25 years of frontline fundraising and managing frontline fundraisers, Greg has served in various leadership positions.

Greg is a certified Fundraising Executive (CFRE), earned the Chartered Advisor in Philanthropy (CAP®) from the American College of Financial Services, and a MS in nonprofit management from Eastern University.

He founded Stick Figure Fundraising, LLC to help you and your nonprofit find success in fundraising, bringing effective and efficient fundraising programs to your non-profit, without stepping between you and your donors.

Cassie Mesko: A strategist and closer, Cassie Mesko has raised millions of dollars of new gifts and commitments by virtue of her work in major gift solicitations, prospect management, volunteer capacity building, and comprehensive campaign management for both higher education and social change organizations.

Prior to joining Stick Figure Fundraising, Cassie most served as Associate Director of Major Gifts at Lafayette College, managing a donor portfolio along the West Coast and in the London and New York metro areas, Director of Development at Drexel University, and Major Gift/Planned Giving Officer at East Stroudsburg University Foundation.

SESSION 4

3:00 PM-4:00 PM

Creating an Epic Team: The Science of People

Rebecca "Beka" Shea, Culture Index. Leadership and Management

Learn the proven method for creating successful teams with minimal effort in this session - Creating an Epic Team: The Science of People. By the end of this talk leaders will learn how to set clear direction to align their teams, increase productivity in their existing teams, help their leaders and team communicate more effectively , and recognize the all-stars you need to promote or recruit for future success.

Rebecca "Beka" Shea is a dynamic leader with over 20 years of experience in the U.S. Navy, mechanical engineering, and real estate investment. She holds a Master's in Mechanical Engineering and has excelled in roles such as military officer, energy project pioneer, and entrepreneur. As an Executive Advisor at Culture Index, Rebecca focuses on organizational development and leadership coaching, helping teams achieve goals with greater efficiency and enjoyment. She is skilled in scaling businesses, increasing ROI, and leading cross-functional teams. Additionally, Rebecca is a founding Board Member of the 7 Figure Foundation, dedicated to impactful leadership and growth.

Deepening Donor Relationships: New Strategies to Make Meaningful Connections

Elizabeth Hefner & Kelly Grattan, Schultz & Williams. Relationship Building

Join us for an engaging session on building lasting donor relationships! Explore best practices and learn effective strategies for fostering trust and long-term commitment with your donors. In this interactive session, you will gain valuable tools to evaluate and strengthen your donor cultivation strategies, promoting transformative philanthropic actions. Leave with a comprehensive plan that drives deeper engagement, action, and philanthropy, empowering your nonprofit to thrive. Don't miss this opportunity to transform your approach to donor relations!

Elizabeth Hefner: Liz is a seasoned fundraising professional with more than a decade of experience. She currently serves as a consultant at Schultz & Williams, where she works with a variety of nonprofits, including The University of Pennsylvania Weitzman School of Design, The Wetlands Institute, Westfield Friends School, and Habitat for Humanity of Chester County. By bringing her experience as an engineer to the nonprofit context, Liz has successfully grown fundraising programs by developing goals, tracking activity, identifying problems, and providing strategies and solutions.

Liz is a Certified Fundraising Executive (CFRE) and serves on the board of the Association of Fundraising Professionals, Greater Philadelphia Chapter, as President-Elect and Vice President of Industry Excellence.

Kelly Grattan: As a member of the Schultz & Williams consulting team, Kelly Grattan has worked with many nonprofit organizations over the last 25 years. In her work at these organizations, she oversaw the operational aspects of the development function—database administration, donor stewardship, and prospect research—before moving into major gifts and chief development officer roles. Kelly is currently serving as Board Chair for the Association of Fundraising Professionals-Greater Philadelphia Chapter (AFP-GPC). She also holds a doctor of philosophy in administration and leadership in the nonprofit and public sectors, a master of business administration in leadership, a certificate in nonprofit management from The Nonprofit Center at La Salle University's School of Business and a Blackbaud certification in Raiser's Edge. Kelly has been a Certified Fundraising Executive (CFRE) since 2016 and a Chartered Advisor in Philanthropy® (CAP®) from The American College of Financial Services since 2022.

The Allentown Warming Station: A Case Study in Centering Community Solutions to Leveraging Diverse Dollars

Kate Cohen, River Crossing YMCA. Securing the Gift

Through the lens of seven years' worth of Allentown Warming Station operations, fundraising, and partnership, generate new ideas on how to build a compelling fundraising case for your program. Through the sharing of real-world examples, case materials, and partner testimonials, participants will learn: 1) the importance of centering case around community solutions, 2) how to leverage diverse funding sources to remain sustainable, 3) how to reinvigorate your community case annually with impact data and evolution to continue financial sustainability, and 4) the importance of partnership in community case.

Kate Cohen is Vice President of Development, Leadership Giving & Strategic Partnerships, for River Crossing YMCA (RCY)—formerly Greater Valley YMCA (GVY) and the YMCA of Bucks and Hunterdon Counties. From 2018-2023, Kate brought the development practices of six formerly-independent Ys together, serving as the GVY's CDO. From 2023-present, Kate helped merge two development teams, now focused on greater impact in RCY's four-county region. Over the last decade, Kate has led philanthropic campaigns raising more than $30 million. Additionally, Kate has served in volunteer positions with AFP of the Lehigh Valley and the Lehigh Valley Nonprofit Collaboration Conference, among others. Kate graduated from Moravian University, earning her Masters in Public Administration and Nonprofit Management Certificate from Villanova University.

Less Time, More Impact: Automating Donor Stewardship for Greater Engagement

Lisa Brand, Moravian University. Relationship Building

This presentation will explore how nonprofit organizations can harness the power of automation to streamline donor stewardship efforts, boost engagement, and achieve greater impact with less manual effort. By automating key aspects of donor communication and engagement, organizations can nurture deeper relationships with donors, increase retention, and drive long-term support—all while reducing time spent on repetitive tasks.

Lisa Brand is Assistant Vice President of Development Operations at Moravian University and Theological Seminary. She has a wide range of leadership responsibilities including Development Communications, Stewardship, Prospect Research, and Gift and Database Management.

She has held positions of increasing responsibility at Moravian for the past 36 years. She has experience in all aspects of development including advancement metrics, developing policies and procedures, data analytics and data mining, prospect relationship management, prospect research, donor relations and stewardship, event planning and management, communications, and data recording standards.

Professionally, she is a member of the Council for Advancement and Support of Education (CASE), the Association of Fund Raising Professionals, and the Association of Advancement Services Professionals (AASP). She is CASE Global Reporting Standards Scholar Certified.

CFRE International has developed this form as a way for you to quickly track (and keep in your files!) the continuing education sessions you have attended. Check the boxes next to the sessions you attended. At the end of the conference, add the total number of hours. Keep this sheet, and you will be ready to complete your application form. All of the session slots listed are eligible for continuing education points on your CFRE application for initial certification and/or recertification. Sessions not listed here are not eligible for points.

Activity Organizer: - AFP Greater Lehigh Valley Chapter

Title of Activity: - Lehigh Valley Philanthropy Institute

Names of Presenter: - Various

Dates and Location: - May 13, 2025 – Center Valley, PA USA

KEYNOTE

- ☐ Financing Our Future: Building Local Impact Investing Ecosystems that Work for Communities

Session 1: 10:15 am – 11:15 am (1 pt)

- ☐ Cutting Through the Noise - What's Working NOW to Spur Donor Engagement
- ☐ Balance Sheet Philanthropy: Tax-Effi cient Giving Strategies to Meet Donor Needs and Maximize Impact
- ☐ Ethics in Fundraising (and Government, and Business, and Life)
- ☐ How to Advance in Your Fundraising Career

Session 2: 11:30 am – 12:30 pm (1 pt)

- ☐ Navigating the EITC Program: Applying for and Managing Educational Improvement Organization Designation
- ☐ Communicate with Confidence and Conviction to Build Our Network
- ☐ Plannual Giving - A Planned Giving Program for Everyone
- ☐ Culturally Queer: Create an Inclusive Culture of Philanthropy for LGBTQIA+ Donors

Lunch Session 12:40 pm – 1:40 pm (1 pt)

- ☐ Building A Healthy & Sustainable CGA Program Panel Discussion
- ☐ The Power of Partnership: Nonprofits and DAF Donors in Action

Session 3: 1:45 pm – 2:45 pm (1 pt)

- ☐ Know Your Donor Better: Understanding Financial Trauma
- ☐ Market Research Fundamentals for Philanthropic Organizations
- ☐ Financial Storytelling: Four Chapters to Make You a Best Seller
- ☐ Stick Figure Capital Campaigns: Understanding the Components of a Successful Capital Campaign

Session 4: 3:00 pm – 4:00 pm (1 pt)

- ☐ Creating an Epic Team: The Science of People
- ☐ Deepening Donor Relationships: New Strategies to Make Meaningful Connections
- ☐ The Allentown Warming Station: A Case Study in Centering Community Solutions to Leveraging Diverse Dollars
- ☐ Less Time, More Impact: Automating Donor Stewardship for Greater Engagement

Total Number of Points Attained ______

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ABOUT THE AFP GREATER LEHIGH VALLEY CHAPTER

The Greater Lehigh Valley Chapter of the Association of Fundraising Professionals (AFP) has worked to advance ethical and effective fundraising throughout its region since 1986. The chapter has approximately 150 active members, most of whom represent organizations in Lehigh and Northampton counties. These members include leaders in the development, public relations, management, and consulting fields.

Chapter Mission
Advancing philanthropy by enabling people and organizations to practice ethical and effective fundraising. The core activities through which AFP fulfills this mission include education, training, mentoring, research, credentialing, and advocacy.

Chapter Vision
Fundraising is viewed as a credible and respected profession for civic betterment in eastern Pennsylvania.

Chapter Core Values
Philanthropy, inclusiveness, excellence, integrity and credibility, collaboration, and service responsiveness.

Visit **AFPGLV.org** for additional information.

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