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**2026**



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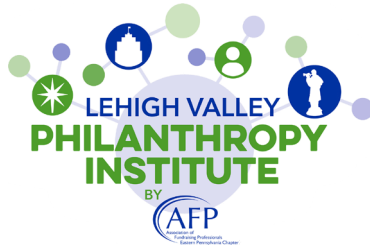
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# SCHEDULE OF EVENTS

7:30-9:00 a.m.

Exhibition Hall

Check-In & Breakfast

9:00-10:00 a.m.

Commonwealth Room

Intro and Keynote: Chad Barger

Slow Fundraising: A Calmer, More Effective Approach to Sustainable Development

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

10:15 - 11:15 AM

Commonwealth

HOW TO HAVE MORE PRODUCTIVE CONVERSATIONS WITH DONORS

**CHAD BARGER, ACFRE**

10:15 - 11:15 AM

Trexler

MAJOR DONOR FUNDRAISING IN THE WORLD OF AI - DON'T LET YOUR MAJOR DONORS "SPOT CHAT"

**LIZ HEFNER, CFRE;  
RACHAEL BARRETT, MBA;  
BAILEY TRACY**

10:15 - 11:15 AM

Wood

ENDOWMENT FOR ENDURANCE

**DOLORES LAPUTKA, JUDY HARRIS,  
ALISA BARATTA, STEPHEN LINK,  
DIANNE MANGES**

10:15 - 11:15 AM

Hurd

PLANNED GIVING MYTHS VS REALITY

**GREG WILSON, MOLLY DRISCOLL**

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

11:30 AM - 12:30 PM

Commonwealth

FINANCIAL STORYTELLING 2.0:  
THE WORKSHOP EVERY  
NONPROFIT LEADER NEEDS

**TISHA HYTER**

11:30 AM - 12:30 PM

Trexler

ETHICS 101  
**MEGAN BESTE**

11:30 AM - 12:30 PM

Wood

IMPACT INVESTING FIRESIDE CHAT

**STEPHEN LINK, ERIKA RIDDLE  
PETROZELLI, ALISA BARATTA,  
BECCA MCATEE**

11:30 AM - 12:30 PM

Hurd

10 WAYS TO INCREASE YOUR GRANT  
SUCCESS (THAT HAVE VERY  
LITTLE TO DO WITH WRITING)

**JULIE ZUMAS**

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

1:45 - 2:45 PM <b>Commonwealth</b> EITC-EIO PROGRAM OVERVIEW & CREATING A SPECIAL PURPOSE ENTITY <b>CHRISTINA J. SCHOEMAKER,</b> MBA, CFRE	1:45 - 2:45 PM <b>Trexler</b> BUDGETING FOR SUSTAINABILITY <b>LINDA RENTSCHLER</b>
1:45 - 2:45 PM <b>Wood</b> DAF FIRESIDE CHAT – POWERHOUSE PHILANTHROPIC PIPELINE <b>TYLER PAPAZ, DAVIDE ESTANISLAU,</b> <b>STEPHEN LINK, MORREEN RUKIN</b>	1:45 - 2:45 PM <b>Hurd</b> HOW TO ADVANCE IN YOUR FUNDRAISING CAREER <b>LINDA LYSAKOWSKI</b>

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

3:00 - 4:00 PM <b>Commonwealth</b> PLAYING BIG WITHOUT BURNING OUT: RESILIENCE STRATEGIES FOR FUNDRAISING PROFESSIONALS <b>SHONDA MORALIS</b>	3:00 - 4:00 PM <b>Trexler</b> ORGANIZATIONAL STRUCTURE FOR ETHICAL FUNDRAISING <b>LINDA RENTSCHLER</b>
3:00 - 4:00 PM <b>Wood</b> MAJOR GIFT PANEL DISCUSSION <b>ADAM STAUFFER, MARISSA ZONDAG,</b> <b>STEVE GROURKE</b>	3:00 - 4:00 PM <b>Hurd</b> PHILANTHROPY IN ACTION: ENGAGING YOUR BOARD & STAFF IN FUNDRAISING EVENT EFFORTS <b>MAGGIE SCHUTZLER,</b> <b>ANDREW MAI OSBORNE</b>

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# KEYNOTE ADDRESS

9:00-10:00AM

## **Slow Fundraising: A Calmer, More Effective Approach to Sustainable Development**

In a world where fundraisers are constantly pushed to do more with less, burnout is real—and results can suffer. What if the key to better fundraising wasn't working harder, but working smarter and slower?

Join fundraising master trainer Chad Barger, ACFRE, ACNP, for an insightful and empowering workshop inspired by Cal Newport's book *Slow Productivity*. You'll explore how fundraisers can embrace a calmer, more focused approach to development work that prioritizes impact over busyness. This session will introduce three transformative principles: do fewer things by focusing only on high-return fundraising activities, work at a natural pace that aligns with donor readiness and your organizational rhythm, and obsess over quality by elevating the strategy and execution behind every touchpoint.

Leave with practical tools to slow down, refocus, and achieve more by doing less—but better.



**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 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.

# SESSION 1

10:15-11:15AM

## How to Have More Productive Conversations with Donors

Chad Barger, ACFRE, ACNP

Join fundraising master trainer, Chad Barger, ACFRE, ACNP, for a session focused on improving the conversations that we have with our donors. We'll cover practical tips that you can immediately implement to improve your donor interactions and, in the process, Chad will walk you step by step through how he has successfully engaged donors throughout his 25+ year fundraising career.



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## Endowment for Endurance

Delores Laputka, Judith Harris, Alisa Baratta, Stephen Link,  
Dianne Manges

Many nonprofits like the “idea” of starting an endowment but may be intimidated by the “how / what / why” of the process. Our panel’s collective expertise will address the legal aspects of how to set up an endowment, the donor’s perspective on the importance of establishing an endowment, the nonprofit’s experience in executing and establishing an endowment, and how to proceed with long-term investing of endowment monies. Come ready with your questions!



**Delores Laputka, Esq.** focuses her practice primarily on tax-related matters, whether connected to a family’s closely-held business or to estate planning for one of the principals. In a former life, Dolores was a Certified Public Accountant, which enables her to handle complex business and tax-related matters for corporations, limited liability companies, and partnerships, as well as succession planning and financial and estate planning for families

and executives at all levels. She also devotes a significant portion of her practice to tax issues for not-for-profit organizations, including charitable giving techniques maximizing the income tax and death tax benefits.

She has handled multi-dimensional transactions, applying tax-efficient methodology to the buying and selling of family businesses, inter-relation of succession planning, and estate planning for closely-held businesses, corporate restructuring, mergers and acquisitions, real estate transactions, management of privacy issues surrounding significant lottery winnings, and more.

Dolores especially enjoys management and consulting with the nonpublic business owner in all aspects of the legal and business environment “from cradle to grave.”



**Judith A. Harris**, Co-Chair of the Estate, Trust, and Tax Law Practice Group, has over 30 years of experience in the areas of taxation, wills and trusts, estate administration, business matters, and tax-exempt entities.

In addition to creating estate plans for clients from the most sophisticated to the most basic of wills, revocable trusts, powers of attorney, and living wills, Judith handles business matters involving corporations, partnerships, and limited liability companies. Her practice also includes the creation and representation of charitable trusts and foundations, as well as representation of estates, trusts, and beneficiaries in disputes before the Orphans' Court. She handles the resolution of tax controversies for business and individual taxpayers before all divisions of the Internal Revenue Service and the Pennsylvania Department of Revenue. These cases often involve estate, business, and individual audits, or the resolution of collection efforts such as liens, levies, and garnishments by the IRS and state taxing authorities.



**Alisa Baratta** is Executive Director of Third Street Alliance in Easton. The Alliance delivers early childhood education, shelter, rental assistance, and support service to working families and those at-risk or experiencing homelessness. Through LaSalle University's Nonprofit Center, she served as interim executive for six nonprofits. She also was Executive Director of Nonprofit Connection, delivering strategic planning, board and

organizational development to nonprofits in NYC. She has taught at NYU's Wagner Graduate School of Public Service and The New School's Milano Graduate School of Public Policy. Recent board service includes Northampton County Housing Development Corporation, HOME Easton, Eastern PA Community Financial Services, Eastern PA CoC, and LV Regional Homeless Advisory Board.



**Stephen Link**, 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.

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**Dianne Manges** is an institutional investment professional with over 30 years stewarding nonprofits' investment portfolios and endowments. In her decades-long career, which began at Warren W. York & Co. in Allentown, Dianne has held senior positions, including Senior Portfolio Manager and Director of Fixed Income, and has served on intrafirm Investment Committees. She has authored economic and market commentaries for clients and

regularly speaks at industry events. Dianne Manges served for many years as Senior OCIO Investment Manager with the Truist Foundations and Endowments Specialty Practice. Her role there was to advise on the development and implementation of investment strategies to help nonprofit clients meet their short and long-term goals.

Dianne earned a bachelor's degree in economics from Immaculata University, where she graduated summa cum laude and was awarded the top medal in economics. Dianne serves on the Boards of Immaculata University, Ben Franklin Technology Partners, Gemma Services Foundation, and as a committee member and/or supporter for several nonprofit organizations in the Lehigh Valley including The Allentown Parknership, The Arc's One Step Forward Celebration, Lehigh Valley Philanthropy Institute, Girl Scouts Eastern PA Take The Lead 2026, United Way's Tocqueville and Women United Societies, Good Shepherd Women's Giving Circle, PBS39's Leadership Society, and Valley Youth House Catalyst Society.

## Major Donor Fundraising in the World of AI - Don't Let Your Major Donors “Spot Chat”

Liz Hefner, CFRE; Rachael Barrett, MBA; Bailey Tracy, Schultz & Williams

Small and mid-size fundraising teams face increasing pressure to diversify their funding streams, particularly through major gifts. Yet many teams lack the time, resources, or expertise to build robust major gift programs. This session addresses that gap by providing participants with best practices in major gift fundraising, from prospect identification to cultivation and solicitation strategies. Attendees will also gain insights into emerging AI tools transforming the field. Through examples, participants will see how AI can enhance prospect research, personalize donor engagement, and ultimately maximize major gift success—even with limited staff capacity.



**Liz Hefner** is a Senior Consultant at Schultz & Williams, focused on partnering with outstanding, inspiring clients to make a difference in an ever-changing world. She possesses a deep and practical knowledge of how a well-run back-end operation advances a nonprofit’s success through the data-centered assessment of program effectiveness. 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 has been a Certified Fundraising Executive (CFRE) since 2020, and serves on the board of the Association of Fundraising Professionals, Greater Philadelphia Chapter as President-Elect.



**Rachael Barrett** joined Schultz & Williams in 2026 as a Senior Consultant, providing assessment, counsel, and fundraising strategy guidance. She brings more than 20 years of nonprofit experience, partnering with organizations to strengthen fundraising efforts and drive sustainable revenue growth. A strategist with deep expertise across the arts, human services, youth services, public health, community and workforce development, legal

services, and advocacy, Rachael specializes in increasing revenues from institutional donors—foundations, corporations, and government funders. Her skills include prospect research, proposal writing, case statement development, and board engagement. Rachael holds an MBA from the University of New Haven and a BS from Emerson College.



**Bailey Tracy** is a Consultant at Schultz & Williams, where she partners with nonprofit organizations to strengthen their fundraising programs and advance strategic planning efforts. Her work spans fundraising strategy, donor engagement, and organizational planning, helping clients align their development goals with long-term mission impact. Prior to joining Schultz & Williams in 2022, Bailey worked at a small family

foundation that supports emerging leaders in social justice nonprofits internationally. Bailey has her Bachelor of Arts and Master of Public Policy from Temple University.

# Planned Giving Myths vs Reality

Greg Wilson, Molly Driscoll

We've all heard the headlines shouted from the roof tops regarding the incredible wealth transfer that has started. This is one time that FOMO is real as several trillion dollars are passed from one generation to another. From marketing to the first meeting to making the ask, we'll provide a tactical road map for understanding and securing planned and plannual gifts.



**Greg Wilson** in his 20+ years of frontline fundraising Greg has served in various leadership positions including Associate VP, Development/ Chief Development Officer for Good Shepherd Rehabilitation Network and Good Shepherd Penn Partners, a joint venture with Penn Medicine, Director of Leadership Gifts and Planned Giving at Muhlenberg College, the Senior Director of Individual Giving at East Stroudsburg University Foundation, the Director of Development for

Sisters of the Order of St. Basil the Great, and the Boy Scouts of America.

Greg is a certified Fundraising Executive (CFRE), earned the Chartered Advisor in Philanthropy (CAP®) from the American College of Financial Services, a MS in nonprofit management from Eastern University and a BA in history from Lebanon Valley College. You've probably also seen Greg in various Planned Giving Marketing YouTube videos focused on practical planned giving fundraising advice or speaking in-person across Pennsylvania.

Greg's purpose-focus is:

- Bringing proactive marketing & networking to your planned giving program
- Helping you navigate the PG Marketing/vendor relationship
- Coaching you through the process of building and achieving your planned giving program
- Speaking to you and your staff in-person or virtually
- Presenting to you, your staff and your AFP chapter or other association/ group



**Molly Driscoll** has spent over 20 years championing the missions of Lehigh Valley non-profits through a versatile and impactful career in development. Currently serving as the Director of Planned Giving at Lehigh University, Molly specializes in the “art of legacy” — guiding alumni and friends through the deeply personal process of defining their permanent impact on the institution.

Molly’s comprehensive expertise is built on a foundation of hands-on experience in grant writing, annual funds, and strategic events for prominent local organizations, including Phoebe Ministries and Community Services for Children. This “big picture” perspective allows her to bridge the gap between technical gift planning and compelling donor storytelling. In addition to managing a high-touch donor portfolio, at Lehigh, she oversees all planned giving marketing and leads internal education to empower her colleagues in legacy conversations. A true advocate for the region, Molly extends her leadership to the community as a board member for Southern Lehigh Youth Baseball and a youth field hockey coach.



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# SESSION 2

11:30 AM-12:30 PM

## **10 Ways to Increase Your Grant Success (That Have Very Little to Do with Writing)**

Julie C. Zumas

This session is designed to help nonprofit professionals understand that winning grants is about far more than strong narratives alone. Participants explore how relationship-building, strategic planning, and funder-centered thinking can dramatically improve long-term grant outcomes. Learn how to move away from reactive grant seeking by strengthening internal systems, diversifying revenue streams, and creating intentional partnerships.



**Julie C. Zumas**, owner and principal consultant of Lehigh Valley Grant Services, LLC, 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.

## Impact Investing Fireside Chat

Stephen Link, Erika Riddle Petrozelli, Alisa Baratta, Becca McAtee

In a shifting funding landscape, nonprofit leaders are looking for new opportunities to finance cashflow, expand service delivery, and pay for facility expansion and improvements. Impact investing connects investors looking to achieve social impact and financial returns with nonprofit organizations willing to adapt to alternative, flexible capital tools.

This session will help enhance understanding of how impact investing works, its supplemental nature to help nonprofit organizations, and questions organizations need to be asking themselves to prepare stronger financial foundations for their mission.

Target Audience: CEOs, CFOs, Board Finance Chairs, Donors with capacity, Fundraisers



**Stephen Link** 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 and Historic Bethlehem Partnership and currently serves on the boards of the Estate Planning Council of the Lehigh Valley, Humanitarian Social Innovations (a fiscal sponsor), and the organizing committee for the Association of Fundraising Professionals (AFP) 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 as well as an M.A. in European Civilization from Katholieke Universiteit, Leuven, Belgium. In his spare time, Steve enjoys reading, running, photography, gardening, and travel.



**Erika Riddle Petrozelli, CPA**, has served as President and Chief Executive Officer of the Foundation since January 2021. She provides strategic leadership for the Foundation's philanthropic mission, guiding community impact initiatives, donor engagement, and long-term growth. Erika joined the organization in 2014 as Director of Donor Services and later served as Vice President of Philanthropy, helping shape the Foundation's direction and

leadership during the COVID-19 pandemic.

A Certified Public Accountant and Chartered Advisor in Philanthropy, Erika brings expertise in charitable planning and is passionate about helping individuals, families, and businesses support the causes they care about most.

Deeply committed to the community, she serves as Treasurer of the Board of Managers of the Bach Choir of Bethlehem, is a board member of Community Action Lehigh Valley, and is Vice Chair of the Pennsylvania Community Foundation Alliance.

A Bethlehem native, Erika is a graduate of Lehigh University (Accounting) and has been recognized as a Lehigh Valley Business Women of Influence.



**Alisa Baratta** is Executive Director of Third Street Alliance in Easton. The Alliance delivers early childhood education, shelter, rental assistance, and support service to working families and those at-risk or experiencing homelessness. Through LaSalle University's Nonprofit Center, she served as interim executive for six nonprofits. She also was Executive Director of Nonprofit Connection, delivering strategic planning, board and

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**Becca McAtee** is Director of Development at Halcyon, where she leads fundraising efforts for global accelerator programs supporting early-stage social entrepreneurs. She partners with donors, foundations, and institutions to mobilize resources that advance innovative, impact-driven ventures.

Her career spans organizations including Village Capital, Good Shepherd Rehabilitation Network, and United Way of the Greater Lehigh Valley, where she has aligned philanthropic and investment capital with high-impact initiatives. Becca specializes in strategic philanthropy, impact investing, and donor engagement across sectors such as education, healthcare, environmental sustainability, and economic mobility.

A former board member of AFP Greater Lehigh Valley, she holds a Master of Science in Fundraising Management from Columbia University and maintains CAP and CFRE certifications.

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We **FUND** nonprofits and partner in the community to improve the quality of life in our region as a trusted and respected grantmaker.



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# Financial Storytelling 2.0 The Workshop Every Nonprofit Leader Needs

Tisha Hyter, CSRIC®

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 five-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.

- PNC's Financial Storytelling Workshop where we review steps and work on drafts of "adding metrics to your mission"
- Including specifics on how nonprofits can use gifts such as the one you've received as a "multiplier" for future financial commitments
- Additionally, we cover the updates of the tax implications of OB3



**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.

## Ethics 101

Megan Beste

Ethical questions in fundraising are inevitable! Megan will use case studies to address the following points:

Ethics = moral principles that govern a person's behavior or the conducting of an activity & the moral correctness of specified conduct. Following or creating guidelines and rules helps with decision making. Reviewing case studies gives a sense of the type of ethical challenges that exist in fundraising. How making an ethically questionable decision can affect a reputation.



**Megan Beste**, Director of Community Partnership Services at Taggart Associates 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.”

# SESSION 3

1:45 PM-2:45 PM

## **Budgeting For Sustainability**

Linda Rentschler

Passion can launch a non profit, but budgeting for sustainable compensation keeps it thriving. In this practical and thought-provoking session, we'll explore why budgeting for fair, living wages and benefits for executive directors and key personnel is essential for long-term stability. Even when leaders are willing to sacrifice, organizations must build budgets that reflect the true cost of leadership. Participants will learn how fair compensation strengthens equity, governance, succession planning, and funder confidence. Walk away with strategies to ensure your organization is built to endure beyond any one individual's personal capacity.



**Linda Rentschler** is the Executive Director and founder of Humanitarian Social Innovations.

She has a bachelor's degree from Gettysburg College in Biology, and master's degrees in Educational Leadership and Business Administration from Lehigh University, and is a US Army Veteran.

Linda is a Pennsylvania and Nationally Certified Standards For Excellence consultant. She serves on the PANO Board of Directors, is Vice-President of PANO's Standards For Excellence Committee, and also serves on their Strategy Committee. She serves on the Governance Committee of the National Network of Fiscal Sponsors.

## DAF Fireside Chat – Powerhouse Philanthropic Pipeline

Tyler Papaz, Davide Estanislau, Stephen Link, Morreen Rukin

Understanding the options Donor Advised Funds present to donors, their families, and nonprofits, is critically important given over \$325 Billion awaits distribution, and the pace of giving to and through DAFs has accelerated at an increasing pace.

This panel will give attendees an introduction to the basics of how DAFs work, why individuals are choosing this method to coordinate their giving, and practical perspectives on working with professional advisors, families, and DAF administrators.

Questions welcome! Goals:

- Understanding the different types of DAFs, and their pros and cons
- Learning what they can and can not do
- Exploring how best to engage as a nonprofit.



**Tyler J. Papaz AIF®** is President of Cornerstone Advisors Asset Management, LLC. Tyler is a member of firm's Executive Committee, Investment Policy Committee, Strategic Planning Committee, and chairs the Marketing Committee. He came to Cornerstone in 2013 after having spent eight years at MetLife. He serves as Board President for the Saucon Valley Soccer League. In his spare time, he coaches and plays soccer, golfs, snowboards,

and spends time with his family. He and his wife Jenna live in Lower Saucon with their three children, Stella, Bode, and Lola. Tyler received a B.A in Economics from Lafayette College, an MBA from Lehigh University, and recently obtained a Master's in Taxation (MT) from Villanova University School of Law.



**Davide Estanislau** is a Senior Manager of Charitable Consulting at DAFgiving360. He helps independent advisors, family offices and business partners to integrate charitable planning into wealth management strategies and helps clients maximize their philanthropic impact. Davide has over 15 years of industry experience and joined DAFgiving360 in 2025. Prior to joining DAFgiving360, Davide was with Foundation Source, a provider of

comprehensive support services for private foundations for over decade. While there, he was responsible for understanding the needs and identifying philanthropic solutions for ultra-high net worth clients and the Private Wealth Advisors who serve them. He earned a BA from the University of Connecticut, holds the Chartered Advisor in Philanthropy (CAP®) designation, and completed advanced training with philanthropic consultant 21/64. Davide lives in Connecticut with his family.



**Stephen Link** 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 and Historic Bethlehem Partnership and currently serves on the boards of the Estate Planning Council of the Lehigh Valley, Humanitarian Social Innovations (a fiscal sponsor), and the organizing committee for the Association of Fundraising Professionals (AFP) 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 as well as an M.A. in European Civilization from Katholieke Universiteit, Leuven, Belgium. In his spare time, Steve enjoys reading, running, photography, gardening, and travel.



**Morreen Rukin** is a seasoned entrepreneur and trusted advisor with nearly three decades of experience building and leading mission-driven organizations. She is the founder of Custom Retention Solutions, Inc. (CRS), a firm dedicated to helping organizations create thriving workplaces that drive engagement, productivity, and long-term employee retention. Through her work at CRS, Morreen is deeply committed to coaching leaders across

industries, as well as mentoring entrepreneurs navigating the early stages of business growth.

In addition to her professional work, Morreen brings more than two decades of direct philanthropic governance experience. She has served as a Trustee and Board Member of a private family foundation since 2011 and as a Trustee of a Donor-Advised Fund since 2018, giving her a practical, firsthand perspective on the strategic, operational, and family dynamics that distinguish private foundations and DAFs—and when a “both/and” approach can be most effective.

Morreen is passionate about giving back through both leadership and service. She has been consistently recognized as a top fundraiser for Alex’s Lemonade Stand Foundation, the American Cancer Society, and the National MS Society. She also served for seven years on the Montgomery School Board, including roles as Chair of the Board, Vice Chair, and Chair of the Advancement Committee. Her leadership and entrepreneurial impact have been widely recognized, including honors from the Philadelphia Business Journal as a Woman of Distinction and by Governor Ed Rendell as one of Pennsylvania’s Top Women in Business. CRS was named a Philly 100 Top Business for three consecutive years beginning in 2016. Morreen is also a co-author of *Dream, Inc.: Million Dollar Business Strategies* from *32 Successful Philadelphia-Area Entrepreneurs*.

## EITC-EIO Program Overview & Creating a Special Purpose Entity

Christina J. Schoemaker

Program overview for the State of Pennsylvania Educational Improvement Tax Credit (EITC) Program including eligibility, applications, and reporting requirements. Attendees will also learn how to create a Special Purpose Entity (SPE) and discuss soliciting investors to fund your EITC approved programs.



**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.

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# How to Advance in Your Fundraising Career

Linda Lysakowski

Are you in the fundraising career and not certain what options for advancement are available? We will talk about how to decide if you want to be a generalist or a specialist, what options are available, how to develop or enhance the qualities that make a good fundraiser, how to move up within your organizations, when it time to move one, and whether you are ready to jump into consulting.



**Linda Lysakowski** of Learn with Linda, is one of slightly more than 100 professionals worldwide to hold the Advanced Certified Fund Raising Executive designation. In her thirty-five years as a philanthropic consultant, Linda has managed capital campaigns, helped hundreds of nonprofit organizations achieve their development goals, and trained more than 100,000 development professionals in Canada, Mexico, Egypt, Bermuda, and most of the fifty United States.

She has published more than forty books.

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# SESSION 4

3:00 PM-4:00 PM

## **Playing Big Without Burning Out: Resilience Strategies for Fundraising Professionals**

Shonda Moralis, MSW, LCSW, MSCP

Fundraising professionals are experts at carrying big missions, ambitious goals, and relentless expectations. But when urgency becomes constant, even the most passionate leaders can edge toward burnout.

In this practical and engaging session, Shonda Moralis shares evidence-based strategies to help high-impact professionals manage stress, regulate overwhelm, and sustain energy over the long haul. Participants will learn simple tools to reset in the moment, reframe productivity for sustainability (not depletion), and build resilience without sacrificing drive.

Attendees will leave with:

- Practical tools to manage stress and emotional overload
- A sustainable approach to productivity and performance
- Simple strategies to prevent burnout before it takes hold

This session blends neuroscience, real-life stories, and actionable takeaways designed specifically for mission-driven leaders.



**Shonda Moralis, MSW, LCSW, MSCP**, is a psychotherapist and executive performance strategist who helps organizations retain and support high-performing women leaders through the midlife transition. With over 30 years of experience in behavioral health, she specializes in stress, menopause, and protecting leadership performance during pivotal career stages.

Through keynotes, workshops, and her six-month Reclaim Midlife@Work program, she partners with organizations to strengthen retention, resilience, and engagement of experienced female talent. She is the award-winning author of two books and has been featured in Forbes, Psychology Today, and CNBC.

Shonda lives in Pennsylvania with her husband and two kids, loves to play outside, and is perennially fascinated by what makes people tick.

# Organizational Structure for Ethical Fundraising

Linda Rentschler

Ethical fundraising begins long before the first donor is asked to give. It is rooted in strong governance, clear accountability, and compliance with legal requirements. Without a properly structured board and transparent oversight practices, organizations risk conflicts of interest, regulatory penalties, and loss of donor trust.

This session explores how nonprofit leaders can design and maintain an organizational structure that supports ethical fundraising practices. Special attention will be given to the role of the board in maintaining independence—particularly in matters of executive compensation and oversight. We will also review the ethical and legal responsibility to register in states where fundraising occurs, conduct required board meetings, and maintain current IRS filing.



**Linda Rentschler** is the Executive Director and founder of Humanitarian Social Innovations.

She has a bachelor's degree from Gettysburg College in Biology, and master's degrees in Educational Leadership and Business Administration from Lehigh University, and is a US Army Veteran.

Linda is a Pennsylvania and Nationally Certified Standards For Excellence consultant. She serves on the PANO Board of Directors, is Vice-President of PANO's Standards For Excellence Committee, and also serves on their Strategy Committee. She serves on the Governance Committee of the National Network of Fiscal Sponsors.

## Major Gift Panel Discussion

Adam Stauffer, Marissa Zondag, Steve Groucke

In today's fundraising environment and evolving tax code, major gifts from individuals are more important to the health and well-being of your organization. Bring your questions and situations for a live and lively discussion on major gifts today. From pipeline management through solicitation, no question is too big or too small. Panelists include: Adam Stauffer, SLUHN, Steve Groucke, National Park Foundation, Marissa Zondag, Moravian University.



**Adam Stauffer** joined St. Luke's University Health Network in 2023. In his current role as Associate Vice President for Individual Giving, Adam oversees annual, major and planned giving efforts within the development office, focusing on aligning philanthropic investments with the most critical healthcare needs of the community. He is dedicated to fostering partnerships that drive meaningful impact for patients and families across the Lehigh Valley and beyond.

Adam has worked in the advancement and fundraising sector for 25 years, including 22 years specifically within higher education. Prior to joining St. Luke's, he served a distinguished 17-year tenure at Lafayette College, where he held several leadership positions including Executive Director of Principal Gifts and Associate Vice President. During his time in higher education, Adam was recognized for his entrepreneurial approach to fundraising and his ability to build robust, long-term donor relationships.

Adam holds a Bachelor of Science and a Master of Education from East Stroudsburg University of Pennsylvania. Deeply committed to community service and regional growth, he is a member of the Board of Directors for the Bethlehem Chamber of Commerce. He has also been a long-standing leader within the United Way of the Greater Lehigh Valley, serving as a Board Member for the Tocqueville Society and a member of the Campaign Cabinet. Additionally, Adam served on the East Stroudsburg University Foundation Board for nine years, including a term as Board Chair from 2022 to 2024. Adam values the personal connections made through his work and finds great reward in welcoming colleagues and alumni into his professional journey.



**Marissa Zondag** serves as the Assistant Vice President of Development at Moravian University. In her role, she oversees a team of major and leadership gift officers, foundation & government relations, donor relations and legacy giving. 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. In addition to her work in Development, she also

serves as the Advisor and Assistant Coach to Moravian's equestrian team and loves the opportunity to work with Moravian's incredible students. Outside of Moravian, she is the President of the Friends of the Bethlehem Mounted Police, a nonprofit dedicated to ensuring the care and well being of the four horses of Bethlehem's Mounted Patrol Unit, one of only 5 mounted units in the state of PA!



**Steve Grouke** serves as Senior Vice President, Leadership and Planned Giving, for the National Park Foundation. NPF is the congressionally chartered nonprofit partner of the National Park Service and serves as the community foundation for the national park system - supporting and strengthening a network of more than 470 park partners across the country.

With more than 25 years of experience in the nonprofit sector, Steve has held senior leadership positions at The American College of Financial Services, Villanova University, and The Nature Conservancy, along with public-sector experience in land conservation.

Steve holds a Master of Public Administration and is a Chartered Advisor in Philanthropy® (CAP®), a Certified Impact Philanthropy Advisor, and a 21/64 Certified Advisor.

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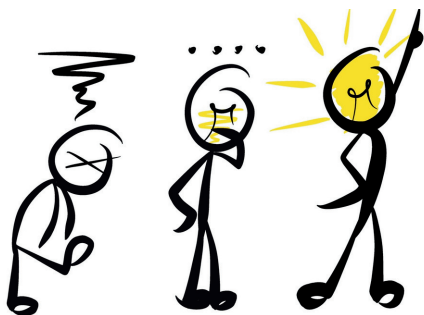
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# Philanthropy in Action: Engaging Your Board & Staff in Fundraising Event Efforts

Maggie Schutzler, Andrew Mai Osborne

Fundraising events don't run on logistics, they run on people. But getting board members, executives, and staff meaningfully engaged is often the hardest part of the job. In this dynamic session, Maggie and Andrew of Queer for Hire draw on real nonprofit experience to give development professionals practical tools for moving the people around them. You'll leave with concrete strategies for making asks that land, language that connects, and an approach you can implement immediately, without full organizational buy-in required. If you've ever chased down a board member for a ticket commitment, this session is for you.



**Maggie Schutzler** (she/her) is a development professional with nearly four years of nonprofit fundraising experience in the Lehigh Valley. Currently serving as Donor Relations Officer at Pennsylvania Youth Theatre, Senior Fundraising Consultant at Queer For Hire, and VP of Mentorship on the AFP Lehigh Valley board, she previously served as Development Director at the Jewish Community Center of the Lehigh Valley and Director of Impact & Innovation at

The Kindness Project. Magdalena holds a Master of Arts in Theatre and Certificate of Graduate Study in Nonprofit Management from Villanova University, and a Master of Education from DeSales University.



**Andrew Mai Osborne** (he/him) is a fundraising strategist and creative producer with a decade of nonprofit leadership. He drives individual giving, corporate sponsorship, and donor engagement through storytelling-led strategy and strong partnerships.

Andrew leads donor communications and cultivation initiatives, designing sponsor programs that align mission with marketing and coaching teams in relationship-based fundraising. His collaborative approach builds authentic, equity-centered cultures of philanthropy.



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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 5, 2026 – Center Valley, PA USA**

**KEYNOTE**

- Slow Fundraising: A Calmer, More Effective Approach to Sustainable Development

**Session 1: 10:15 am – 11:15 am (1 pt)**

- How to Have More Productive Conversations with Donors
- Endowment for Endurance
- Major Donor Fundraising in the World of AI - Don't Let Your Major Donors "Spot Chat"
- PG Myths vs Reality

**Session 2: 11:30 am – 12:30 pm (1 pt)**

- 10 Ways to Increase Your Grant Success (That Have Very Little to Do with Writing)
- Impact Investing Fireside Chat
- Financial Storytelling 2.0: The Workshop Every Nonprofit Leader Needs
- Ethics 101

**Session 3: 1:45 pm – 2:45 pm (1 pt)**

- Budgeting For Sustainability
- DAF Fireside Chat – Powerhouse Philanthropic Pipeline
- EITC-EIO Program Overview & Creating a Special Purpose Entity
- How to Advance in Your Fundraising Career

**Session 4: 3:00 pm – 4:00 pm (1 pt)**

- Playing Big Without Burning Out: Resilience Strategies for Fundraising Professionals
- Organizational Structure for Ethical Fundraising
- Major Gift Panel Discussion
- Philanthropy in Action: Engaging Your Board & Staff in Fundraising Event Efforts

**Total Number of Points Attained \_\_\_\_\_**

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**President Elect:** Alex Dapkewicz, Lehigh Valley Health Network

**Past-President:** Greg Wilson, Consultant/Owner Stick Figure Fundraising LLC

**Treasurer:** Christian Averill, Good Shepherd Rehabilitation

**Secretary:** Ann Marie Surovy, Catholic Foundation

### Board Members

Andrew Block, VP of Membership, Block Strategies & Solutions, LLC

Tracy Kleppinger Bozik, VP of Marketing, Fellowship Community

Maggie Schutzler, VP of Mentorship, Pennsylvania Youth Theatre

Jessie Shappell, National Philanthropy Day Chair, Equi-librium

Christopher Moran, MBA, Lehigh Conference of Churches

Corissa Rolón, Burn Prevention Network

Rosaria Stoops, IDEA Chair, Friends of Allentown Parks

### LEHIGH VALLEY PHILANTHROPY INSTITUTE COMMITTEE

**Co-Chair** - Michelle Ellison, Stick Figure Fundraising, LLC

**Co-Chair** - Kristen Walsh, Historic Bethlehem Museums & Sites

### MARKETING LEADERSHIP

Christopher Moran, The Lehigh Conference of Churches

### COMMITTEE MEMBERS

Robin Hewston, AFP Chapter Manager, Humanitarian Social Innovations

Stephen Link, Cornerstone Advisors Asses Management, LLC

Andrew Mai Osborne, Queer for Hire

Dianne Manges, Truist-Retired

Tracy Stauffer, Pediatric Cancer Foundation of the Lehigh Valley

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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.

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