

# 50 *Fundraisers Legacy* YEARS

**OF RELATIONSHIPS, RESILIENCE & RESULTS**



**AUGUST 6-7, 2025**

Gateway Conference on Philanthropy



**WashU**



# WELCOME TO THE 2025 GATEWAY CONFERENCE ON PHILANTHROPY

This year, we mark a significant milestone - 50 years of advancing philanthropy in St. Louis—at the AFP St. Louis Chapter Gateway Conference. This year’s theme, “Fundraisers’ Legacy: 50 Years of Relationships, Resilience & Results,” pays tribute to the dedicated professionals who have shaped our region through deep relationships, unwavering resilience, and meaningful outcomes.

Our chapter continues its commitment to provide our local fundraising community with the best in regional and national speakers, focusing on a wide range of fundraising and nonprofit management topics and techniques. Given the complexities and uncertainties our sector is faced with, we encourage you to approach the sessions offered at our Gateway Conference on Philanthropy with curiosity and a collaborative spirit.

Organizing this annual conference is no easy task - I would like to thank our Conference Chair, Brenda Marsian, MA, CFRE, and our conference committee for the many MANY hours dedicated to planning and coordinating this event. We would also like to thank the many speakers who have contributed their time and talent to the day’s program. Of course, we are deeply grateful to our keynote speakers and panelists; Russ Austin, Lauren Ross, Mark Norwood, Dr. Jason Purnell, Elke Buckland, Barbara Carswell, and Scott Baier.

Finally, last but certainly not least, thank you to Washington University in St. Louis for hosting us for the first (and hopefully not last!) time on their Danforth University Campus.

Our Gateway Conference on Philanthropy is made possible by the generosity of our conference sponsors. Be sure to visit the Vendor Booths to learn more about our sponsors, and the myriad of ways they can partner with you to accomplish your fundraising goals.

Cheers to the next 50 years!



**Rachel D'Souza, MPPA, MLS**  
AFP St. Louis Board President

Wednesday, August 6

# SCHEDULE

## 10:30 AM Check-In & Lunch for Purchase

Clark Fox Forum Atrium

## 12:00-2:00 PM Breakout Session I

- Classroom 70 Lead Boldly. Manage Brilliantly. Mastering the Art of Both.
- Classroom 100-Brown Fast Moves to Boost Your Donor Stewardship Plan Today
- Classroom 120 How to Close the Gift
- Classroom 130 The Rise of Donor Advised Funds & Why it Matters
- Clark Fox Forum Atrium Building an AI-Assisted Grant Project: From Setup to Proposal - Part One

BREAK

## 2:15-4:15 PM Breakout Session II

- Classroom 60 Power of Service: How Volunteers Shape Our Community
- Classroom 70 The Importance of Strategy in a Time of Uncertainty
- Classroom 100-Brown From Visioning to Reality: Resiliency
- Classroom 120 Using Linear Fund Development to Achieve Consistent Results
- Classroom 130 **Double Session: Planned Giving Deep Dive**
  - Starting & Growing a Planned Giving Program (2:15-3:15 PM)
  - Surviving & Thriving the "Silver Tsunami" 2nd Wave (3:15-4:15 PM)
- Clark Fox Forum Atrium Building an AI-Assisted Grant Project: From Setup to Proposal - Part 2



Thursday, August 7

# SCHEDULE

## 7:00 AM Check-In & Breakfast

Clark Fox Forum Atrium

## 8:00-9:15 AM Welcome & Morning Keynote Panel

Clark Fox Forum Atrium Campaign Conversations: Insights from the Frontlines of Major Fundraising Initiatives

## 9:30-10:30 AM Breakout Session I

Classroom 60 How to Build a Smart Leadership Annual Giving Program  
Classroom 70 Beyond the Report: Creating a Relationship-Driven Grant Culture  
Classroom 100-Brown Reimagining Organizations & Systems Through Identities & Storytelling: Channel Your Chapter  
Classroom 130 The Art & Science of Major Giving: Turning Insights into Actions  
Clark Fox Forum Atrium Built to Last: Creating a Donor Experience That Drives Retention

BREAK

## 10:40-11:40 AM Breakout Session II

Classroom 60 Know Your Worth: Navigating Compensation with Clarity & Confidence  
Classroom 100-Brown The A - Z of Making a Fund the Need  
Classroom 120 Operationalizing Prospect Development: Moving Beyond Reactive Research  
Classroom 130 Embracing Failure as a Part of Your Strategy  
Clark Fox Forum Atrium Millennial Philanthropy: More than Avocado Toast & Lattes

## 11:40 AM-12:50 PM Lunch

Clark Fox Forum Atrium

## 12:50-1:50 PM Breakout Session III

Classroom 60 Stewardship That Pays Off: How Donor Care Drives Fundraising Success  
Classroom 70 What a Girl Wants...Making Women the Key to Philanthropic Giving  
Classroom 100-Brown Resilience & Reengagement: Smart Design in Turbulent Times  
Classroom 120 Board as Ambassadors: Unlocking Fundraising Capacity Through Networks  
Classroom 130 Mental Health & Philanthropy: Let's Be Honest  
Clark Fox Forum Atrium Setting Donors' Sights Higher

BREAK

## 2:00-3:00 PM Breakout Session IV

Classroom 60 Campaign Readiness: Implementing an Internal Feasibility Study  
Classroom 70 Breaking Down Silos: How Shared Language Fuels Fundraising Success  
Classroom 100-Brown If You Give a Board a Cookie  
Classroom 120 How to Transform Workplace Giving Donors into Mission Champions  
Classroom 130 Gephardt Institute St. Louis Fellows: Impact of Community Partnership  
Clark Fox Forum Atrium Getting to the Suite Spot

## 3:10-4:10 PM Closing Keynote

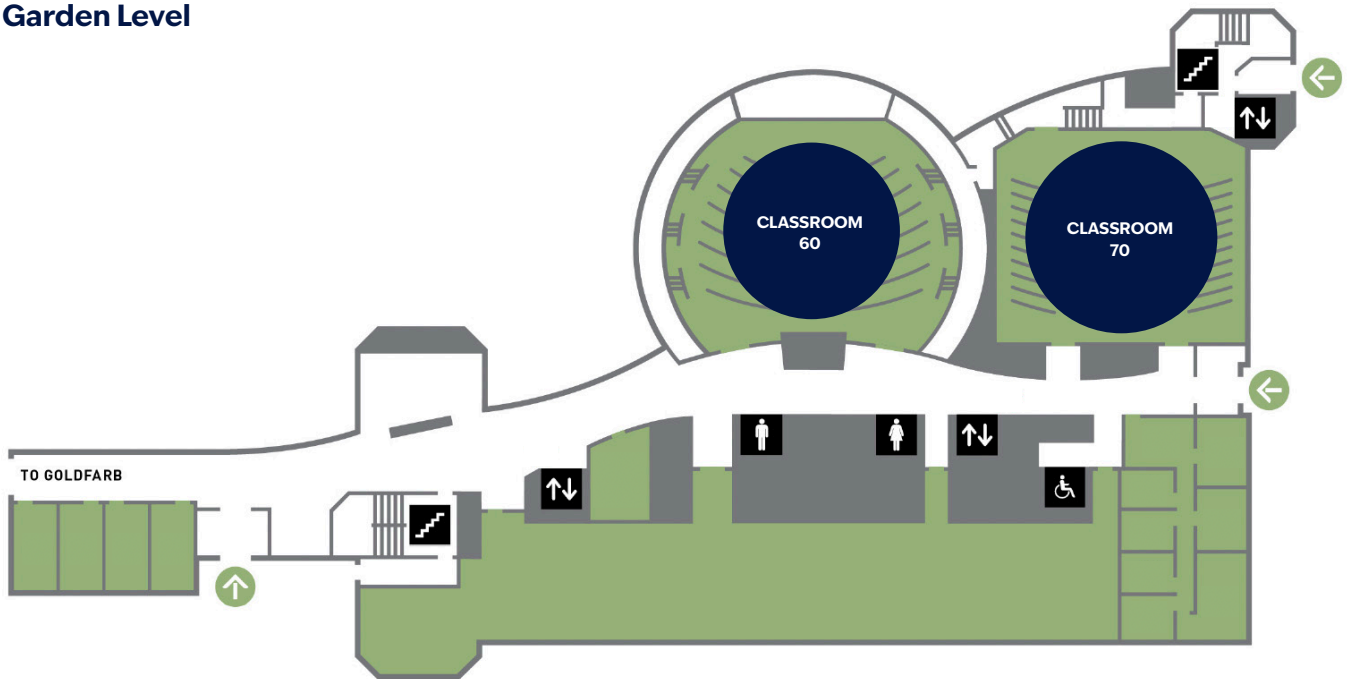
Funding Forward Panel: Insights from St. Louis' Leading Philanthropic Voices

## 4:30-5:30 PM Wine & Cheese Reception

Sponsored by Let's Build Hope, LLC

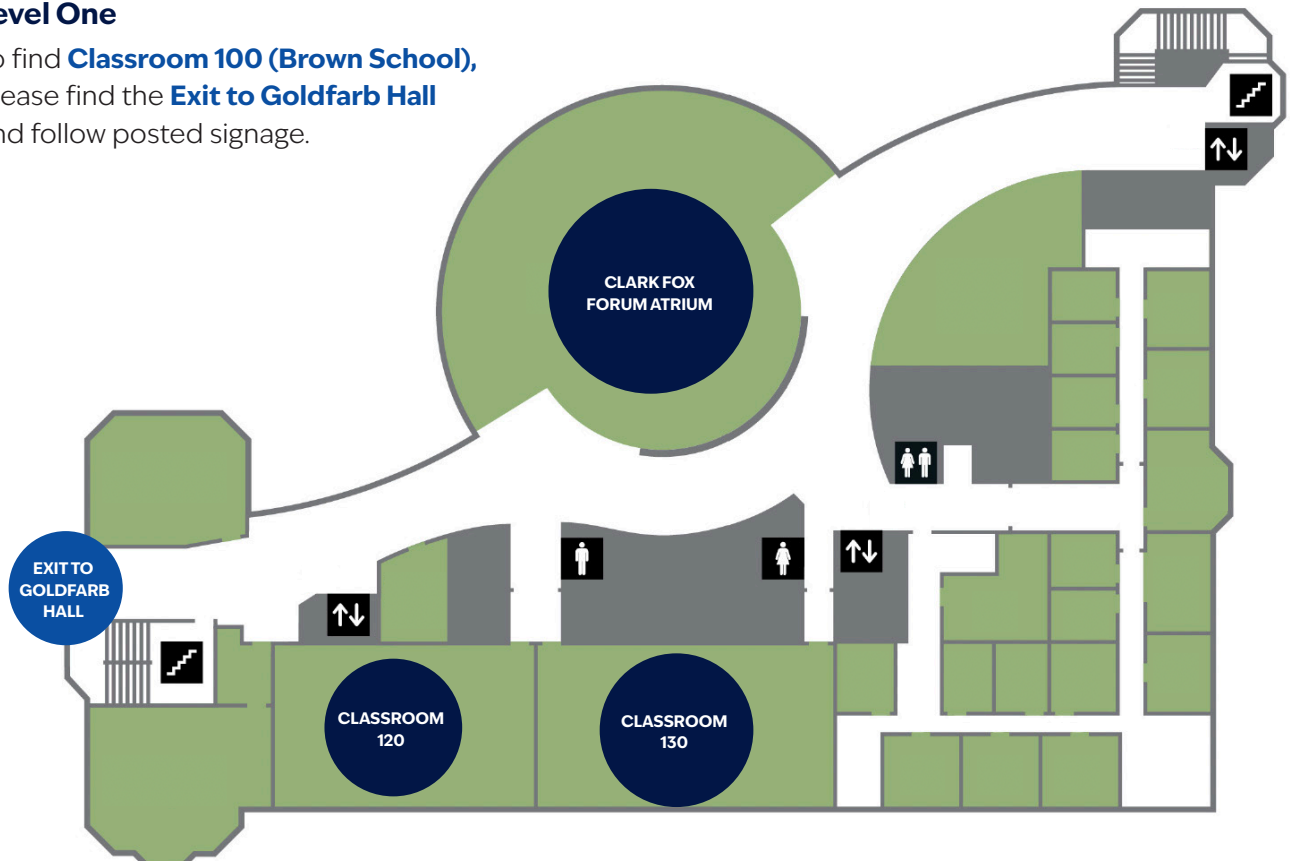
# HILLMAN HALL MAP

## Garden Level



## Level One

To find **Classroom 100 (Brown School)**, please find the **Exit to Goldfarb Hall** and follow posted signage.



# BREAKOUT SESSION I

12:00-2:00 PM

## Lead Boldly. Manage Brilliantly. Mastering the Art of Both.

Classroom 70

What makes a great leader—and how is that different from being a strong manager? In this interactive session, participants will explore the critical distinctions between leadership and management, understanding how both are essential yet distinct functions in any successful organization. Through real-world examples, practical frameworks, and engaging discussion, we'll demystify these roles and clarify when each is needed. Participants will gain insight into how leadership is about setting direction, inspiring others, and driving change, while management focuses on planning, organizing, and executing tasks efficiently. We'll dive into scenarios to illustrate how the best professionals balance these roles and flex between them depending on context.



**Theresa L. Fleck, EdD, CFRE, CAE, CNP** currently serves as the Vice President for Institutional Advancement & Admissions at Logan University. In this position she oversees the development, marketing and communications, admissions, financial aid, alumni relations, university special events, and continuing education departments. A nonprofit and higher education professional since 2001, Dr. Fleck has extensive experience developing strategy and executing fundraising, admissions, and marketing & communications plans for a wide range of organizations, including; universities, independent schools, social service agencies, international non-governmental organizations (NGOs) and the arts. She has a proven track record of designing and implementing comprehensive strategic and tactical campaigns...[read more at afpstl.org](http://afpstl.org).



**Emily Lohse-Busch** leads the effort to make 39 North a global epicenter for agri-food tech innovation. Before 39 North, she spent much of her career in a myriad of roles within the philanthropic and social sectors in St. Louis, Chicago, and Washington DC. She is passionate about building and sustaining organizations that improve the human condition, and in recent years, her focus has been on leading organizations that help create a thriving economy and culture that benefits all St. Louisans.

## Fast Moves to Boost Your Donor Stewardship Plan Today

Classroom 100 (Brown School)

This workshop is ideal for teams that need to implement a solid stewardship plan but haven't yet – or for teams with a stale strategy that need more meaningful and effective tactics. Using real-world, tested strategies and campaigns M&C has launched – as well as compelling examples from other nonprofits – Monica and Merritt will engage the group in an interactive discussion guaranteed to spark new conversations and give attendees ideas they can start using immediately.



**Monica Tiffany** specializes in developing effective communications strategy for companies and organizations. She has written for Shriners Hospitals for Children, National Geographic, Susan G. Komen for the Cure and the American Red Cross, to name a few.

Monica served as VP of Marketing and Communications for the Association of Fundraising Professionals—Greater Kansas City Chapter. She also served on the Reach Out and Read KC Community Council and Jackson County CASA board of directors. A Mizzou graduate, Monica currently serves on the MU English Leaders Development Board helping to promote the university's English Department and connect recent graduates with career opportunities... [read more at afpstl.org](http://afpstl.org).



**Merritt Neil** is a direct marketing strategist, copywriter and trainer. She specializes in providing measurable results for clients through a range of marketing channels, print and digital. She regularly consults and writes for both for-profit and nonprofit national organizations. Merritt serves on the faculty at Rockhurst University, where she developed and teaches the Marketing and Technology Trends course. She is past president of the Kansas City Direct Marketing Association. KCDMA named Merritt "Direct Marketer of the Year" in 2012. She was honored as a member of the 2016 40 Under Forty class by Ingram's Magazine.

## How to Close the Gift

*Classroom 120*

In our consulting practice over 23 years, we have worked with more than a few nonprofits who are great at donor relationship-building but fall short when it comes to actually asking the donor for—and then closing—the gift! Sound familiar??

In this hands-on session, we will provide practical tips, real-life examples, and role play several scenarios right before your very eyes! You will learn how to bring a major gift to closure without having to endlessly chase donors down...and create urgency around the donor making the decision.



**Michael Rubin, MBA, CFRE, ACC**, is President of Rubin & Associates, a fundraising consulting firm empowering nonprofits to achieve their missions & dreams since 2002. With 42 years' experience in fundraising staff and consulting roles, Michael strives for measurable outcomes for his clients. Prior to consulting, he was on staff at Chicago's Lincoln Park Zoo, Rush University Medical Center & Advocate Lutheran General Hospital. Michael has a BA from the University of Michigan, an MBA from the Kellogg School at Northwestern University & is an Associate Certified Coach (ACC) through the International Coaching Federation.

## The Rise of Donor Advised Funds & Why it Matters

*Classroom 130*

This session will provide a comprehensive understanding of Donor Advised Funds (DAFs), including how they function, their rapid growth, and their increasing influence on the nonprofit sector. Participants will leave with a clearer picture of why DAFs have become a dominant force in philanthropy and what this means for the future of nonprofit funding. The learner will explore the benefits and challenges of DAFs for nonprofits, including accessibility, donor anonymity, payout trends, and the role of financial institutions in shaping charitable giving. Attendees will also gain insights into recent policy discussions and how potential regulatory changes could impact DAF giving.



**Patrice Shumate, MSW**, has been serving the nonprofit community since 2005 as a social worker and 2016 as a grant professional. Her passion is creating spaces where small nonprofits have the support they need to navigate a complex and inequitable philanthropic system. She works to build confidence and intention in how nonprofit leaders and grant professionals approach grant funding strategies. She is the owner of A Village for Good and a planning member of More Than Grant Writers planning team.

## Building an AI-Assisted Grant Project: From Setup to Proposal - Part One

*Clark Fox Forum Atrium*

*Attendees are encouraged to attend both sessions of this two-part series to gain the full benefit of the training and walk away with a functional AI-assisted grant writing setup tailored to their organization.*

Curious about using AI to write grants, but not sure where to begin? This practical, beginner-friendly training is designed to help nonprofit professionals set up their own AI-assisted "project" to support grant writing, from proposals to reports and beyond.

In just three hours, you'll learn how to "teach" AI what it needs to know about your organization and how to guide it to generate meaningful, funder-ready content. Through guided learning, real-time practice, and ready-to-use prompts, you'll leave with a working AI setup tailored to your organization and a toolkit of strategies to make AI-generated writing sound more human, persuasive, and compelling. Whether you're a seasoned grant writer or a nonprofit leader wearing multiple hats, this session will give you the confidence and structure to make AI a powerful (and ethical) part of your grant strategy.



**Fielding Jezreel, MSW, GPC**, is the founder of Jezreel Consulting and Federal Grants Accelerator. She provides federal grant writing, training, coaching, and resources to organizations that have limited experience with federal grants. Having raised over \$135 million from a dozen federal agencies with nonprofits in the St. Louis region, she enjoys working across sectors, connecting organizations doing complementary work, and diving into cutting-edge topics in the grants field.



**Dr. Barbara R. Primm** is the founder of All Things Business, LLC, a boutique consulting firm specializing in nonprofit development, corporate and foundation grant writing, and accreditation in higher education and continuing education and training programs. As a seasoned consultant, she provides strategic guidance to organizations seeking funding and compliance. Dr. Primm has successfully guided clients in obtaining substantial grant awards and is passionate about empowering organizations to build sustainable, measurable, and impactful programs.

## BREAKOUT SESSION II

2:15-4:15 PM

### Power of Service: How Volunteers Shape Our Community

Classroom 60

Join Beth Ann Riechman, Lily Mahoney, and Denise McKibben for an inspiring conversation on the transformative impact of volunteerism in the St. Louis region. From grassroots initiatives to large-scale community programs, this session will explore how volunteers drive meaningful change, foster connection, and strengthen the nonprofit sector. This panel will highlight personal stories, innovative approaches to engagement, and the enduring power of service in shaping a more vibrant and equitable community. Moderated by Shannon Smock.



**Shannon Smock, MA** is an adjunct professor and Program Coordinator for the Nonprofit Management program at Washington University in St. Louis, where she teaches grant writing and the capstone course. With over 15 years of nonprofit leadership experience, including 13 years as President & CEO of HealthWorks! Kids' Museum St. Louis, she has led fundraising efforts that secured more than \$5 million in support. Shannon currently serves as Vice Chair of the Cinema St. Louis board, leading fundraising initiatives and championing community engagement. She is also on the board and a candidate for President of the SAG-AFTRA Missouri Valley local...[read more at afpstl.org](https://www.afpstl.org).



**Beth Ann Reichman** is a dedicated community leader and former retail executive with a 28-year career in sales and store management. Her dynamic professional background includes local and national sales representation, training sales managers, and leading top-performing retail teams. She has also planned and executed high-impact events for major brands including Papyrus, Design Design, Daniel Richards Showroom, Macy's, and other prominent retail establishments. Since retiring from retail twelve years ago, Beth Ann has devoted her time to full-time volunteerism...[read more at afpstl.org](https://www.afpstl.org).



**Lily Mahoney** is an active community servant and dedicated volunteer. Over the years, she has contributed countless hours to several local and national organizations. With a deep belief in giving back to the community, Lily has worked on projects big and small, to raise money and awareness. From earning her Girl Scout Gold Award in high school to leading collegiate service initiatives, Lily has continuously found ways to support others. Professionally trained in Computer Science, Lily spent years in the IT field before turning her focus toward nonprofit leadership...[read more at \*afpstl.org\*](#).



**Denise McKibben** is a retired insurance professional with a distinguished career in sales and service to national accounts. With a natural talent for building and sustaining relationships, Denise has worked alongside volunteers, non-profit agencies, corporate partners, and funders throughout her career and volunteer work. Her commitment to service is exemplified by her role as Past President of the Assistance League of St. Louis, where she helped drive impactful community programs through collaboration and strategic leadership. Her volunteer journey is extensive and heartfelt, including roles as PTO President, Boy and Girl Scout Leader, Band Booster President, and active supporter of the Foster and Adoptive Care Coalition...[read more at \*afpstl.org\*](#).

### The Importance of Strategy in a Time of Uncertainty

*Classroom 70*

In this session, Elizabeth and Jason will discuss the importance of aligning your development plan with your organization's strategic plan, and vice versa. Doing so allows organizations to establish reasonable fundraising goals; ensures clarity on roles and responsibilities; avoids "mission creep"; and ultimately leads to longer term, more sustainable success. This is even more important in a time of unprecedented uncertainty and consistent attacks on NPOs.



**Jason Huff, CFRE**, has two decades' experience in professional fundraising. As a consultant for The Rome Group, his focus is capital campaigns, fundraising strategy, and coaching. He taught graduate-level courses on fundraising for non-profits and has given numerous presentations on fundraising, leadership, career development, and effective communications. Jason earned distinction as an AFP Master Trainer in 2014. He is a past president of AFPSTL and served on various committees for AFP International.



**Elizabeth Pickard** has twenty-five years of experience in nonprofits with extensive experience in program facilitation, strategic planning, program development, leadership development, and implementing DEAI practices. Since joining The Rome Group, she has helped numerous clients set their strategic direction. She was formerly the Director of Education and Interpretation for the Missouri Historical Society. She is well-versed in engaging facilitation techniques and multiple teaching methodologies.

### From Visioning to Reality: Resiliency

*Classroom 100 (Brown School)*

The strategic planning workshop is designed as a collaborative, focused session that brings together staff, leadership, and key stakeholders to intentionally align organizational vision with fundraising strategies. This workshop will serve as a dynamic space to connect the dots between programmatic impact and the resources needed to sustain and scale that impact. By fostering open dialogue and strategic thinking, the session will help participants understand how a program (s) contributes to an organizations broader mission, and how storytelling, data, and outcomes can be leveraged to engage funders more effectively. The goal is to create a shared framework that clearly links meaningful work to compelling fundraising priorities. This alignment will strengthen participants case for support, clarify funding needs—particularly for critical personnel—and guide future development efforts with purpose and cohesion. Ultimately, this workshop will lay the foundation for more strategic, impact-driven fundraising.



**Eulonda Nevels** joined EMD as a Senior Consultant in 2022 and became partner in 2024. Until July 2024, she served as Chief Administrative Officer at YWCA Metro St. Louis, overseeing the execution of strategic plans, capacity building, facilities, accreditation, quality improvement and women's services for housing and sexual assault and domestic violence.

## Using Linear Fund Development to Achieve Consistent Results

*Classroom 120*

When most of us begin fundraising, we are thrown into the deep end of the pool. Somebody says, "You are so good with people—you should lead our fundraising efforts!" It sounds SO good in theory, doesn't it? But then we begin to try to practice successful fundraising, and things get a little tougher. The Board, CEO, or Finance team hands us a number—we have to raise it. There's no real conversation about 1) whether or not we have the donors and staff to support that outcome, or 2) exactly HOW we should go about building a plan to be successful. Because successful fundraising always equates to "hitting the target," it seems reasonable that we, as fundraisers, and our teammates on the Board and senior staff would get the training we need to meet our financial goals. In this session with Linda and Dawn, you'll learn about 1) linear, metrics-driven fundraising, 2) how to begin to build a successful plan, 3) how to get your board and senior staff effectively engaged to help you. Join us and leave feeling more prepared than ever that you CAN set and meet fundraising goals every year!



Since 1995, **Linda B. Haley, CFRE**, President & CEO, has successfully raised more than \$200 million for various non-profits of all sizes, including religious, social services, educational, and healthcare organizations. Linda has a breadth of "in the trenches" development experience that makes her an invaluable resource to organizations of all sizes. She's worked at small, mid-sized, and large charities, leading development initiatives to incredible successes along the way. Realizing a long-time dream, Linda started Let's Build Hope, LLC, in 2013, where she now guides nonprofit agencies by teaching, coaching, and mentoring development teams, senior staff, and Board members...[read more at afpstl.org](http://afpstl.org).



Since 1997, **Dawn M.S. Miller, CFRE**, Senior Vice President, has raised millions for international programs, capital expenditures, social services, disaster relief efforts, annual funds, and comprehensive/special gift campaigns. She has worked closely with nonprofits in 31 states and the District of Columbia with their fundraising efforts, also supporting clients in Canada, Haiti, Mexico, and in Rome, among other locations.

As a consultant, Dawn has extensive experience in designing and managing annual fund programs using mission and metrics to drive towards a goal; restructuring development operations...[read more at afpstl.org](http://afpstl.org).

## DOUBLE SESSION: PLANNED GIVING DEEP DIVE

*Classroom 130*

### Starting & Growing a Planned Giving Program (2:15-3:15 PM)

Are you looking to initiate or expand a planned giving program within your nonprofit organization? Join us for an informative session tailored to organizations of all sizes. Whether you are starting from scratch or scaling an existing program, this session will provide you with the tools and knowledge to succeed.

In this session, you will learn the essential steps to establish a planned giving program, including initial planning, goal setting, and resource allocation. We'll cover strategies to grow your program, enhance donor engagement, and optimize your fundraising outcomes. Understand how to craft compelling messages and marketing campaigns that resonate with potential donors, and gain insights into building and maintaining an effective planned giving team. Explore the tax benefits for donors and how to communicate these

advantages effectively to encourage planned gifts. Learn the importance of integrating planned giving into the "three-prong" donor approach alongside annual and major gift solicitation.

Led by Mary Stahl and Lisa Welch from the Planned Giving Office at Washington University in St. Louis, this session will draw on their extensive experience with successful planned giving programs. They will share actionable insights and practical tips, ensuring you leave with a clear understanding of how to start and grow a planned giving program that meets your organization's unique needs.



As Assistant Vice Chancellor of Planned Giving at Washington University, **Mary Stahl** manages the planned giving team and collaborates with donors on bequests, charitable gift annuities, charitable remainder unitrusts, and outright gifts. Before joining WashU in 2016, she managed planned giving at Grinnell College and held leadership roles at Monmouth College, directing a capital campaign and coordinating planned giving. Prior to higher education, Mary spent 20 years in healthcare administration.



**Lisa Welch** is a Director in the Office of Planned Giving at Washington University. She partners with donors on bequests, charitable gift annuities, charitable remainder unitrusts, real estate, and outright gifts. Lisa began her career more than 20 years ago as an estate planning attorney working with high-net-worth individuals before transitioning into the planned giving field. She has held planned giving roles at the University of Chicago and Southern Methodist University, both during capital campaigns.

### Surviving & Thriving the "Silver Tsunami" 2nd Wave (3:15-4:15 PM)

The "Aging of America" demographic phenomenon coupled with the life-changing pandemic has created tremendous legacy giving opportunities like we've never seen before. Learn how dynamic broad-based marketing can let you reach a broader audience that will help you not only survive this "wave," but thrive in it! Join Renee as she shares key marketing approaches and fundraising techniques that effectively move donors along in their legacy giving journey. We'll review World Wildlife Fund's program where we're seeing TRIPLE THE RESULTS in their legacy giving marketing over the last four years!

Learning Objectives:

1. Understand the massive fundraising opportunity in legacy giving with the wave of Boomers and the changing mindset given the global pandemic.
2. Identify the five stages of the legacy donor journey and how this differs from traditional giving.
3. Learn key marketing approaches and techniques that effectively move donors along in their legacy giving journey using World Wildlife Fund as an example where we're seeing triple the results in their legacy giving marketing over the last three years!



**Renee Durnin, CFRE**, has specialized in leveraging analytics to build effective fundraising communications for legacy and major giving along with donor acquisition and renewal campaigns for over 20 years. She leads Stelter's key clients, such as World Wildlife Fund, Feeding America, The Salvation Army, Save the Children, and World Vision. Renee earned her Philanthropic Psychology certificate in 2021. Since 2009 she's acquired and held her CFRE certification to accompany her B.A.

### Building an AI-Assisted Grant Project: From Setup to Proposal - Part 2

Clark Fox Forum Atrium

Curious about using AI to write grants, but not sure where to begin? This practical, beginner-friendly training is designed to help nonprofit professionals set up their own AI-assisted "project" to support grant writing, from proposals to reports and beyond...[flip to page 7 to read more about this two part session and about the presenters.](#)

# MORNING KEYNOTE PANEL

8:00 AM | Clark Fox Forum Atrium

## Campaign Conversations: Insights from the Frontlines of Major Fundraising Initiatives

Join Russ Austin, as he moderates a dynamic panel of St. Louis nonprofit leaders managing capital and comprehensive campaigns of all sizes. Panelists include Lauren Ross, and Mark Norwood. This session offers a behind-the-scenes look at campaign planning, leadership engagement, donor pipeline development, and what it takes to stay on track. Whether your campaign goal is \$1 million or several billion dollars, learn best practices, innovative strategies, and candid lessons from organizations in the trenches.



**Russ Austin**

Associate Vice Chancellor of  
Advancement | WashU

With nearly twenty years of university fundraising experience at both state and private universities, **Russ Austin** is a seasoned advancement professional known for unwavering dedication and commitment to advancing the missions of educational institutions. As a versatile and accomplished fundraiser, Russ has successfully navigated various facets of university development, leaving a lasting impact on each area he has touched.

Before his current position as Vice Chancellor for Development at Washington University in St. Louis, Russ held key positions in diverse fundraising roles...[read more at afpstl.org](http://afpstl.org).



**Lauren Ross**

Executive Director | Laumeier  
Sculpture Park

Laumeier Sculpture Park welcomed Executive Director **Lauren Ross** in August 2018. She has 30 years of curatorial and arts leadership experience, having served as Curator and Director of Arts Programs for the High Line, the outdoor, elevated public park in New York City; Curator of Modern and Contemporary Art at Philbrook Museum of Art in Tulsa, Oklahoma; and inaugural Curator of the Institute for Contemporary Art at Virginia Commonwealth University in Richmond, Virginia. She is also a distinguished writer who has contributed to catalogs published by institutions including the Victoria and Albert Museum and the Dallas Museum of Art...[read more at afpstl.org](http://afpstl.org).



**Mark Norwood**

Co-Head of School | Crossroads College  
Preparatory School

As a young man, **Mark Norwood** returned to Saint Louis and took part-time work at a local independent school as an after-school counselor and substitute. He loved working with children in a school setting and has spent the last 35 years in independent schools as a teacher, coach, Dean of Students, and now Co-Head of School at Crossroads College Prep, located not far from the Washington University campus in one of the most diverse regions of the metro area. Mark is now in the middle of All for Crossroads, a \$5 million campaign.

Mark and his wife Beth live in the Forest Park Southeast neighborhood, now often called The Grove...[read more at afpstl.org](http://afpstl.org).

# AFTERNOON KEYNOTE PANEL

3:10 PM | Clark Fox Forum Atrium

## Funding Forward Panel: Insights from St. Louis' Leading Philanthropic Voices

Rachel D'Souza, will moderate a dynamic conversation with some of the region's most influential philanthropic leaders—Dr. Jason Purnell, Elke Buckland, Barbara Carswell, and Scott Baier. Together, they will explore how today's political and economic climate is influencing funding priorities, how foundations and corporate funders are evolving their focus areas, and how they are thinking about equity, systems change, and measurable impact. Attendees will gain timely insights into philanthropic trends and learn what nonprofits can do to build authentic, lasting relationships with funders—and thrive in an ever-changing landscape.



**Rachel D'Souza, MPPA, MLS**

AFPSTL President, 2024-2025  
Founder + President | Gladiator Consulting

**Rachel D'Souza, MPPA, MLS** is the founder of Gladiator Consulting in St. Louis, MO, a boutique firm co-creating with nonprofits across the country. As a proud member of the Community-Centric Fundraising Global Council, Rachel works to guide and resource a global initiative to reimagine the nonprofit sector through a lens of radical collaboration, racial equity, social justice, and decolonization.

In 2024, Rachel completed her coursework to earn her second Master's Degree at the Washington University School of Law. With this additional training in negotiation, mediation and cross-cultural conflict resolution, Rachel is eager to shift organizational culture and interpersonal relationships...[read more at afpstl.org](https://www.afpstl.org).



**Dr. Jason Purnell**

President | James S. McDonnell  
Foundation

**Dr. Jason Purnell** joined the James S. McDonnell Foundation as president in 2023 after leading the community health improvement strategy at BJC HealthCare. He created health equity programs with colleagues and partners and introduced an anchor institution agenda focused on investments in high-poverty communities of color. This work built on his scholarship at Washington University's Brown School, where in 2014, he and his collaborators released the seminal "For the Sake of All" report on African American health in St. Louis, inspiring policy changes and programmatic innovations. Dr. Purnell's BA is from Harvard, and his PhD is from Ohio State University.



**Elke Buckland**

Executive Director | The Saigh Foundation

**Elke Buckland** is the Executive Director of The Saigh Foundation, a private foundation founded in St. Louis, Missouri in (1999). The work of the Saigh Foundation is focused on enhancing the lives of children and youth in the areas of education and health. Elke succeeded a foundation founder, JoAnn Hejna, as only the second Executive Director in the foundation's history.

Elke began her professional career in manufacturing and supply chain management as an owner operator for sixteen (16) years. She transitioned into not-for-profit management in 2013, as a leader on the agency side of philanthropy. Her experience in both not for profit development and operations gives her...[read more at afpstl.org](https://www.afpstl.org).



**Barbara Carswell**

Chief Executive Officer | YouthBridge  
Community Foundation of Greater  
St. Louis

**Barbara Carswell** directs YouthBridge's efforts to partner with donors in support of charities in the St. Louis region, especially those focused on children. She oversees a team dedicated to building the bridge between the philanthropic and nonprofit communities by providing exceptional giving experiences and impactful grants and community investments.

After studies in Bonn, Germany and Geneva, Switzerland, Barbara earned her law degree from the University of Munich and her LL.M. from the University of Georgia. Prior to joining YouthBridge in 2013, Barbara was a tax attorney as well as the Executive Director of a child-serving nonprofit. Before assuming the role of CEO in 2021, she held the position of Vice President of Grants and Community...[read more at afpstl.org](https://www.afpstl.org).



**Scott Baier**

Director of Philanthropy & Community  
Impact | Edward Jones

**Scott Baier** is the Director of Philanthropy & Community Impact at Edward Jones. He believes that Philanthropy should operate in service to the needs of communities and should likewise trust the expertise of the leaders and staff of the organizations that are doing the work.

He came to corporate philanthropy after leading education nonprofit organizations for over twenty years in St. Louis, MO. Before that, he worked in higher education and in a past life taught seventh grade Language Arts at Audubon Middle School in the Los Angeles Unified School District.

A graduate of the University of Notre Dame, Scott serves on the Board of his kids' school...[read more at afpstl.org](https://www.afpstl.org).

# BREAKOUT SESSION I

9:30-10:30 AM

## How to Build a Smart Leadership Annual Giving Program

Classroom 60

When creating a successful Annual Giving program, there are key things to consider- clear statement of your mission, impactful solicitations that show donors how they make a difference, and giving your constituents the opportunity to support your organization with a Leadership Annual Gift. Statistics show that 75% of your Annual Fund comes from 15% of your donors. A Leadership Annual Giving Program can play a powerful role in an organization's overall Annual Fund strategy. Through a small shop case study, learn about how to set up a Leadership Giving Program, launch the appeal, effectively communicate and market the program to constituents and how to steward those donors into becoming possible major gift prospects. You will also learn strategies on how to increase your Board of Trustees giving through utilizing a Leadership Giving Program. If your organization already has an Annual Leadership Giving program in place, the presentation will help identify ways you can elevate your current strategies to increase dollars raised and identify future major donors. This presentation contains overall helpful strategies for any size organization, but is geared toward a small shop approach.



**Christina Weyers** is the Director of Advancement at Churchill Center & School. A fundraising professional with 20 plus years of experience, specializing in educational advancement, she has also worked at nonprofits including St. Jude Children's Research Hospital, Washington University & the St. Louis Symphony. She is seasoned in building & executing comprehensive development plans that include annual & major giving, campaigns, Board & donor relations, marketing/communication strategies & events.

## Beyond the Report: Creating a Relationship-Driven Grant Culture

Classroom 70

What if your next grant win started with a rejection? What if your funder stewardship plan looked more like a major gift strategy than a checklist of deliverables? And what if the key to sustainable grant success wasn't just in your proposal writing—but in your organization's internal culture?

In this engaging and honest session, a Director of Advancement and a Grants Manager will share how they've worked together to build a grant program that does more than apply and report. You'll hear real stories of wins, rejections, and those confusing "not now" emails—and how they've learned to debrief internally, respond with grace, and turn feedback into future opportunities.

You'll also learn how they've embedded grant-readiness into their organizational culture—from aligning program design and storytelling to prepping finance and leadership for the long game. And most importantly, how they've moved foundation stewardship from transactional to transformational—building trust, relationships, and long-term funding partnerships. Attendees will walk away with:

- Practical steps for building a culture of grant readiness across departments
- Templates and talking points for debriefing wins and losses with leadership
- Ideas for proactive, relationship-driven foundation stewardship
- Real-life examples (and lessons learned) from grant wins, fails, and everything in between



**Heather L. Kemper, MFA, CFRE, ACNP**, wears a lot of hats—Director of Advancement at Miriam School, president-elect of Rotary Club of St. Louis, co-founder of 100 Women Who Care, mom of three (energetic!) kiddos, and once even a crown (hello, Mrs. Missouri America!). With two decades in nonprofit life, she's a storytelling strategist, revenue grower, and relentless champion for community impact.



**Andrea Flanigan** is a grant-writing powerhouse with a PR degree from Webster University and a master's in nonprofit leadership from WashU. With over 15 years in the sector, she's secured funds for everything from hunger relief to community development. As Grants Manager at Miriam School, she pairs strategy with storytelling to bring in meaningful support. Off the clock, you'll find her hiking, concert-hopping, or hanging with her husband Chris and their dogs, Walter and Stanley.

### Reimagining Organizations & Systems Through Identities & Storytelling: Channel Your Chapter

*Classroom 100 (Brown School)*

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In a world where systems are often designed without the richness of individual and collective identities in mind, we have to reimagine how we build, lead, and connect. This interactive session explores how storytelling rooted in identity can be a powerful tool to transform organizations and reframe systems. Participants will reflect on their own lived experiences, uncover the narratives that shape their leadership, and learn to "channel their chapter" harnessing personal and community stories to influence culture, equity, and impact. Whether you're a changemaker, team leader, or community advocate, this session will inspire new ways to center authenticity, amplify underrepresented voices, and drive meaningful transformation from the inside out.



**Dr. Lydia Bullock** is a passionate and strategic leader in the fields of diversity, equity, inclusion, belonging and accessibility (DEIBA), with over a decade of experience spanning higher education, nonprofit leadership, and community advocacy. Currently serving as the Chief of Engagement and Belonging Officer at Girl Scouts of Eastern Missouri, Dr. Bullock leads organization-wide efforts to embed DEIB values into every layer of programming, policy, and culture, while fostering cross-sector partnerships that elevate equity and access for girls throughout the region...[read more at afpstl.org](https://www.afpstl.org).

### The Art & Science of Major Giving: Turning Insights into Actions

*Classroom 130*

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In today's competitive philanthropic landscape, unlocking the full potential of your donor base requires more than just a compelling ask—it demands strategy, insight, and inspiration. This session will explore how to effectively motivate donors to give generously by leveraging powerful data, personalized engagement, and passion fulfillment. Participants will also learn how to use data analytics, wealth screening tools, and emerging technologies to uncover valuable insights about donor prospects. Finally, we'll walk through proven steps to cultivate deeper relationships that move donors from modest contributions to major gifts that drive long-term impact. Whether you're new to fundraising or looking to refine your approach, this workshop offers practical strategies for all development professionals.



**Jeff Shaw, CFRE**, currently serves as the Vice President for Institutional Advancement at Prairie View A&M University and the COO of the Prairie View Foundation in Prairie View, TX. He is a senior-level development leader with a rich background in higher education, fundraising, process improvement, and team leadership. Renowned for his ambitious and successful approach, Mr. Shaw has a distinguished track record of enhancing fundraising efforts, community outreach, and academic development operations. His expertise lies in directing development activities, staff program development, and ensuring adherence to the highest operational standards and compliance levels...[read more at afpstl.org](https://www.afpstl.org).

## Built to Last: Creating a Donor Experience That Drives Retention

Clark Fox Forum Atrium

We know donor relationships are key to fundraising success, but how can we build these connections strategically, at scale, when we're already stretched so thin?

In this practical session, you'll discover a four-part donor experience framework that boosts retention while working within you and your team's capacity. We'll focus on creating a structure that helps you build authentic donor relationships systematically, in a way that still feels personal and meaningful to your supporters. Participants will leave with actionable strategies to:

- Update your "thank you" process with small but powerful changes that turn gift acknowledgements into opportunities for connection
- Craft consistent, compelling communications that link donors directly to the difference they're making
- Design low-lift, high-impact engagement opportunities that bring donors closer to your mission and each other
- Time and structure solicitations based on donor behavior and giving patterns

Whether you're a solo fundraiser or part of a larger department, you'll learn how to create a cohesive donor experience that builds loyalty, increases retention, all while being manageable – and even enjoyable – for you and your team!



After nearly fifteen years of fundraising for arts and education organizations, **Katie Mendez** launched Built to Raise in 2023, providing interim director of development and short-term fractional fundraising services specifically for small and mid-sized nonprofits. She brings her depth of experience and expertise in individual giving, volunteer leadership, corporate partnerships and non-profit management to every project, serving as a coach and partner to organizational leaders across the U.S.

# BREAKOUT SESSION I

10:40-11:40 AM

## Know Your Worth: Navigating Compensation with Clarity & Confidence

Classroom 60

You advocate for your mission every day. Are you advocating for yourself with the same conviction? In this session, longtime frontline fundraiser turned nonprofit consultant Shannon Grass shares insights from the hiring side of the table. Drawing on experience leading dozens of executive searches for local and national organizations, she will walk you through how to research realistic compensation benchmarks, evaluate the full value of a role, and navigate salary conversations with confidence. We'll explore tools, resources, and talking points to help you assess your current position or negotiate your next one. Come ready to reflect, ask questions, and engage in practical exercises to strengthen your compensation confidence.



**Shannon Grass, CFRE**, Partner at EMD Consulting, is a CFRE with more than 20 years of experience guiding development efforts at organizations including Washington University, Epworth, Laumeier Sculpture Park, and the Peggy Guggenheim Collection. She specializes in fundraising capacity building, executive search, and coaching for nonprofit leaders and boards. Known for her candor, humor, and knack for connecting people and ideas, Shannon helps organizations grow through clarity, culture, and strong relationships. Beyond work, she loves Missouri mulberry jam, the color orange, and traveling with her husband, sons, and dogs.

## The A - Z of Making a Fund the Need

*Classroom 100 (Brown School)*

What attendees will take away from this presentation is a step by step system for how to plan for their "Fund the Need"/ "Mission Moment" videos for their galas and special events. We will talk about how far ahead you should start planning, how to find that great story, all the assets your video production company will need, do's and don'ts during filming, how to pull great content from your interviewee(s), how to prevent the last minute scramble to get the video done and what really tugs at the heart strings of your attendees so they donate more. Attendees will leave with a digital guide including tips, a checklist and timeline they can utilize to streamline their future gala videos.

As a filmmaker who has been making "Fund the Need" videos for nearly 15 years, Dan will tell stories from the good, bad and ugly moments from creating these videos (no organizational names mentioned of course). He will also provide samples of great "Fund the Need" videos for inspiration, talk about ways to utilize AI to enhance your videos and leave time for Q & A.



**Dan Parris** is an award-winning filmmaker and the co-founder of Speak Up Studios, a St. Louis based video production company specializing in non-profit storytelling. Speak Up Studios has helped nonprofits raise millions through the use of video and storytelling and is passionate about the collective impact happening in the St. Louis region. Dan lives in South City St. Louis with his wife and 4 kids.

## Operationalizing Prospect Development: Moving Beyond Reactive Research

*Classroom 120*

In an era where fundraising success demands more than instinct and anecdote, prospect development has evolved from a behind-the-scenes support function into a critical driver of strategic growth. This session will explore how to transform a reactive research environment into a proactive, integrated engine for sustainable fundraising success. Drawing from real-world experience building and scaling prospect development programs in complex organizations, this presentation will walk attendees through:

- Designing prospect management infrastructures that align with organizational mission and strategic goals
- Shifting culture from "prospect research as a task" to "prospect development as a strategy"
- Integrating CRM systems, portfolio management, and moves management processes to drive collaboration
- Building performance dashboards that create visibility, accountability, and momentum
- Empowering fundraising teams with actionable insights



**Felecia A. McCree** is a strategic operations and prospect management leader with over 20 years of experience optimizing advancement systems, building inclusive fundraising infrastructures, and driving organizational growth through data-informed decision-making. She has led prospect development transformations at national nonprofits, higher education institutions, and consulting firms and brings a human-centered, outcomes-driven approach to operational excellence in philanthropy.

## Embracing Failure as a Part of Your Strategy

*Classroom 130*

In a sector driven by results, failure is often feared – but when approached strategically, it becomes one of the most powerful tools for growth. This session challenges the traditional fundraising mindset by exploring how "failing smarter" can improve your bottom line, strengthen donor relationships, and build more resilient teams.

We'll unpack how innovative organizations use small-scale failures to test new ideas, refine messaging, and avoid large-scale costly mistakes. You'll learn how to build a culture of intelligent risk-taking, communicate with stakeholders about experimental approaches, and extract measurable ROI from what didn't work.

Facts about this session:

- Includes case studies of organizations that turned early campaign failures into major fundraising success.
- Provides a “debrief framework” to help teams learn from misses and maximize insight.
- Offers practical tools for pitching innovation and risk-taking to boards and leadership.
- Participants will leave with a risk/reward matrix and communication templates to support a culture of strategic experimentation.
- Failure isn’t the opposite of success – it’s the secret behind it. Come learn how to fail smarter, fund better, and future-proof your fundraising.



**Jesse A. Winters** is President & CEO of T-REX, a nonprofit innovation center in St. Louis. With experience in nonprofit consulting, leading fundraising teams, and building new revenue strategies, Jesse brings an entrepreneurial lens to philanthropy. Passionate about innovation and mission, Jesse helps organizations embrace risk, experiment boldly, and build resilient, revenue-generating models for long-term impact.

### Millennial Philanthropy: More than Avocado Toast & Lattes

Clark Fox Forum Atrium

Nearly 75 million people make up the Millennial generation worldwide, and yet, for many nonprofits, this generation remains an untapped resource for nonprofits. However, because of the Great Transfer of Wealth from Baby Boomers to Gen Xers and Millennials, millennials need a second look. With the largest generational transfer of wealth in modern history, as well as limited nonprofit resources, nonprofits need to look at the Millennial generation as a source of people, power and philanthropy. Dr. Holly Hull Miori, an academic teacher, researcher and fundraising professional, she examines the roles that Millennials can and should play in your nonprofits as donors, board members, and volunteers. With her book on millennial philanthropy with Palgrave Springer, she explores these questions.



**Dr. Holly Hull Miori** has more than twenty-year career in fundraising and foundation work, where she has raised funds both locally and nationally in higher education, healthcare, arts and human rights and Holocaust education. She serves as the Associate Vice Chancellor, Development and Chief Development Officer at the University of Missouri-St. Louis. Holly earned a bachelor’s degree in both religion and communication arts from Austin College in Sherman, TX and received her master’s in theological studies from Brite Divinity School at TCU. She also holds a Master’s in Public Affairs from UT Dallas and completed her PhD in public affairs in 2021...[read more at afpstl.org](http://afpstl.org).

## LUNCH

11:40 AM-12:50 PM | Clark Fox Forum Atrium

## BREAKOUT SESSION III

12:50-1:50 PM

### Stewardship That Pays Off: How Donor Care Drives Fundraising Success

Classroom 60

This session will explore how intentional, personalized stewardship can significantly improve donor retention and long-term giving. We’ll begin by making the case that the opportunity cost of neglecting past

donors is too high for organizations of any size to ignore. Rather than seeing stewardship as an afterthought, we'll reframe it as a core fundraising strategy—one that builds trust, deepens relationships, and lays the groundwork for future support.

Through real examples from Washington University in St. Louis, we'll look at how a team of Donor Relations Officers implemented bespoke stewardship efforts that helped gift officers exceed their fundraising goals by as much as 542%. We'll unpack what made these projects successful and, most importantly, how they can be scaled for smaller teams or organizations with limited resources.

The session will conclude with a challenge to go beyond the “thank you” by turning stewardship into a two-way conversation. We'll discuss how to use donor responses—both formal and informal—as a feedback loop that strengthens your next ask, improves messaging, and enhances donor engagement. Whether you're stewarding a major donor or building relationships through mass appeals, this session will offer actionable strategies to create meaningful, lasting impact.



**Rick Sindt** is the director of donor engagement at Washington University in St. Louis, where he leads a team pioneering a bespoke stewardship model to strengthen donor relationships and inspire future giving. In their first year, partner gift officers exceeded goals by up to 542%. Rick's background includes roles at Loyola University Chicago and The Arts of Life, with consulting experience across arts and human services sectors.

## What a Girl Wants...Making Women the Key to Philanthropic Giving

Classroom 70

Have you heard about the impending wealth transfer in which close to \$35 trillion will soon end up in the hands of women? In addition, by 2030, it is projected that women will control 70 percent of the estimated \$50 trillion asset transfer from baby boomers. So, what does a girl want when it comes to philanthropic giving and how can your organization engage women to unlock their generosity?

Data shows that female donors want trust, transparency, and collaboration and in this session, Laura and Patty will share their success with women's giving societies at both large and small organizations to build authentic relationships that impact the community, inspire resilience to leverage change, and drive fundraising results.

Using recent studies from McKinsey and Company, the Stanford Social Innovation Review, and the Women's Philanthropy Institute at the Lilly Family School of Philanthropy, we will take a data-focused approach to provide practical and tangible resources for leveraging the resilience and generosity of female philanthropists.



**Laura Roeseler, CFRE** is a skilled leader and fundraising professional with over fifteen years' experience in the non-profit sector. She has been honored to work at several amazing non-profit organizations working to improve our community. She is passionate about equity in healthcare and education and empowering women and youth. She currently serves as the Senior Annual Giving Officer at Mercy Health Foundation. Laura and her husband, Matt, live with their two sons in St. Louis.



**Patty Senft** has 13 years of experience in the educational and nonprofit sectors. Her exceptional skills in donor-centered strategy, public speaking, and organizational leadership, consistently drive results and inspire teams. Passionate about empowering women and future generations, Patty thrives in environments that foster change and growth. She holds a BA in Public Relations from Webster University and an MA in Educational Leadership and Nonprofit Management from Saint Louis University.

## Resilience & Reengagement: Smart Design in Turbulent Times

*Classroom 100 (Brown School)*

In a world increasingly shaped by uncertainty—economic shifts, social transformation, climate impact, and evolving audience behavior—event agencies are being asked to do more with less while creating more meaning than ever before. This panel explores how creative leaders are designing with resilience in mind, reimagining experiences that not only withstand disruption but actively reengage communities, clients, and constituents.



**Amanda Zimmer** prides herself on crafting elegant and heartwarming events that leave a lasting impression. Her diverse background in marketing, venue management, and event production is the secret sauce behind her success. In the past, she spent her time captivating clients throughout southeast Missouri before turning her focus to the nonprofit sector. Now, Amanda's passion lies in transforming ordinary moments into extraordinary experiences, leaving a trail of smiles in her wake. A peek inside Amanda's portfolio shows an array of clients and events, including the University of Missouri - St. Louis, the American Geographical Society, Girl Scouts of Greater St. Louis, and over 100 large-scale weddings.



**Hillary Cartwright** has 15 years of event experience ranging from small coffeehouse concerts at colleges to multi-million dollar sponsorship activations. She has produced events for United Airlines, Kingsford, Benjamin Moore, and most recently, 29rooms for Refinery29. Event safety, staff training, and sustainability have always been a priority and passion for her. Hillary is a member of the Event Safety Alliance and a Member of Meeting Professionals International (MPI). At Evtiv, she leads a team of professionals to serve some of the firm's largest accounts.



**Sierra Thompson** is the Vice President of Business Development at Evtiv, where she specializes in fostering relationship-building and developing large-scale event concepts and designs. With her diverse background in marketing, experiential advertising, digital production, and internal operations, Sierra can speak to all aspects of a dynamic event. Her ambition and passion for building communities have led her to lead and produce major events across the country for both corporate and non-profit organizations. In her role, Sierra takes great pride and joy in working together to create something larger than ourselves.

## Board as Ambassadors: Unlocking Fundraising Capacity Through Networks

*Classroom 120*

Are you seeking a way to transform your board's fundraising potential, and remove their fear of fundraising? This session offers an alternative approach to training: transforming your board into impactful fundraising ambassadors by leveraging their existing networks and reframing asks into sharing their passion. Participants will explore how to empower board members to champion the mission within their circles and lean into their role, leading to significantly increased financial support as ambassadors.

Participants will discover how to:

- Identify and activate their circles of influence for engagement.
- Develop authentic and compelling ambassador narratives to inspire giving.
- Master the art of meaningful connections between their networks and the organization.
- Become natural advocates for the cause and cultivate a friend-raising mindset.
- Implement simple, low-pressure sharing strategies that align with individual comfort levels.
- Measure the impact of network-driven ambassadorship on fundraising outcomes.

This session will feature real-world examples, practical tools, and exercises for your board. Participants will be empowered to redefine their board members' roles, shifting from potentially reluctant fundraisers to ambassadors who share their stories and cultivate significant donations.



**Anne Ross-Weldy** is a nonprofit leader with over 20 years of experience in nonprofit administration, consulting, and as an Adjunct Professor of Nonprofit Administration at Lindenwood University. As the Director of Capacity Building at New Chapter Coaching, Anne empowers organizations to strengthen leadership, board effectiveness, and drive growth through strategic planning and tailored training programs. Anne serves as Board President of Welcome Neighbor STL and on committees with the Arthritis Foundation Missouri and the Girl Scouts of Eastern Missouri.

## Mental Health & Philanthropy: Let's Be Honest

*Classroom 130*

Nonprofit fundraisers are experiencing growing levels of anxiety, burnout, and uncertainty as we face an increasingly unstable world. As the demand for services intensifies, so does the emotional toll on those of us who provide them. This session addresses the root causes of growing mental health challenges in the nonprofit sector and offers practical, collective strategies for health and healing.

We'll explore three key responses:

1. Naming and Normalizing: Recognizing that anxiety and exhaustion are human responses—not signs of failure—is a first step toward healing.
2. Reclaiming Agency: We'll share tools for adapting leadership and cultivating meaning, even in uncertainty.
3. Collective Care: Resilience isn't just personal—it's communal. We'll explore how organizations can embed mental health care into their cultures.

A welcoming and honest conversation about mental health and living in the tension. Participants will leave with renewed hope, a deeper understanding of what they're feeling, and actionable ways to support themselves and one another.



With a career in nonprofit leadership, **Melissa Brickey** has spent years advocating for underrepresented populations. Her professional and personal journey have been defined by a passion for growth and a belief in the power of hope. At CHADS, Melissa champions a cause that holds personal meaning. She has experienced firsthand what it means to face life's challenges with resilience and vulnerability. Her journey has reinforced her belief that struggles don't define a person—they shape them.

## Setting Donors' Sights Higher

*Clark Fox Forum Atrium*

Leveraging over three decades of fundraising and fundraiser management experience, Russ Austin and Sunny Bellows will teach fundraisers how to help donors dream big – what impact does the donor want to make on the organization or the community and how their gift can make that impact a reality. Learn tips and tools for managers to ensure gift officers have the confidence to make those big asks at the right time. Presenters will show how to leverage data to inform solicitations while also trusting the “art” of fundraising.



**Russ Austin** has over 23 years of fundraising experience, with 18 of those in university advancement. He began his development career at the Muscular Dystrophy Assoc. and Madison Children's Museum before moving to the Wisconsin Foundation and Alumni Association (WFAA), the fundraising arm for the University of WI. During his 14 years at WFAA, Russ held roles in medical development and planned giving. In 2020, Russ joined WashU where he is now the Vice Chancellor of Development.



**Sunny Bellows** has over 18 years of fundraising experience, working at the University of Nebraska Foundation from 2007 – 2012 before joining the advancement team at Washington University in St. Louis in June 2012. During her time at WashU, Sunny has traveled nationwide, working with donors across Texas, the Bay Area, and Chicago. She currently leads a team of fundraisers and oversees the fundraising strategy for the Central Territory as Executive Director of Development, Individual Giving.

# BREAKOUT SESSION IV

2:00-3:00 PM

## Campaign Readiness: Implementing an Internal Feasibility Study

Classroom 60

Capital needs are urgent—but is your organization truly ready to launch a successful capital campaign with a stretch goal? Before investing in an external feasibility study, learn how to internally assess your campaign readiness with a practical, proven roadmap.

In this workshop, you'll receive a step-by-step checklist of the infrastructure and initiatives required for campaign success. From building a compelling case for support to ensuring board and donor alignment, you'll leave with real-life examples, a workable plan, and a clear understanding of how to build internal capacity for a major campaign.



**Brenda Marsian**, Chief Philanthropy Officer at Girl Scouts of Eastern Missouri, has 30+ years of fundraising leadership with success leading comprehensive campaigns at Springfield College, Becket-Chimney Corners YMCA and Wakeman Boys & Girls Club. A former consultant with Ketchum, Inc., Brenda holds degrees from Western New England University and the University of Hartford.

## Breaking Down Silos: How Shared Language Fuels Fundraising Success

Classroom 70

A powerful fundraising strategy starts with a unified, shared language across your organization. Without it, teams can inadvertently create mixed messages that confuse donors and derail campaigns. This session will teach nonprofit leaders how to build a common language for fundraising that aligns leadership, staff, and volunteers, making your efforts more cohesive and compelling. By embedding shared messaging into the culture, nonprofits can drive clarity, strengthen donor relationships, and maximize their fundraising success.

Key Takeaways:

- The Power of Shared Language in Fundraising: Why cohesive messaging across your organization is critical for donor trust and engagement.
- Identifying Communication Gaps: How silos and inconsistent language undermine your fundraising efforts.
- Creating a Culture of Consistent Messaging: Practical steps to create a shared language across your organization to strengthen long-term donor relationships.



**Angela Marino** believes transformation starts from the inside. Nonprofit leaders turn to her when their message isn't resonating, their teams are out of sync, or their vision isn't moving forward. With more than 20 years of experience, she helps organizations build internal clarity, align leadership, and communicate with purpose so that change feels not just possible but energizing. Angela brings a steady hand and sharp insight to complex moments, creating the conditions leaders need to make aligned decisions and move forward with confidence.

## If You Give a Board a Cookie

Classroom 100 (Brown School)

A strong Board of Directors is essential for the success of museums, but many board members are unclear about their roles and responsibilities. In this engaging session, NMBL Strategies will lead an abbreviated board training to clarify these duties. The training follows a layered approach, starting with the general responsibilities of board members, then focusing on the specific roles and responsibilities within the context

of the museum, and finally guiding each attendee to create an individual annual plan for their contributions. This structured process ensures that board members understand their general duties, the objectives of their museum's board, and leave with actionable tasks to support their museum's success.

During this session, NMBL Strategies will demonstrate all three phases of their leadership development process. Through interactive activities and games, participants will have the opportunity to reflect and create actionable plans. NMBL believes that a strong board remains actively engaged with the museum, enhancing its growth through clear understanding and involvement in their roles.

Much like the children's book *If You Give a Mouse a Cookie*, this approach inspires board members to take initiative and return for more ways to contribute to the museum's growth.



At the helm of NMBL Strategies is CEO **Eric Moraczewski**. His dynamic, seasoned leadership style sets the tone at NMBL and in turn, for NMBL's extensive portfolio of clients. Eric took his background as a global consultant, CEO and CFO to found NMBL Strategies in 2019 after leading the Gateway Arch Park Foundation (Private Foundation responsible for providing \$250 million of the \$380 million project) through the largest Public-Private Partnership in National Park Service history.



When **Casey Jolley** joined the NMBL Strategies team as the Director of Project Management, she took her significant experience within the nonprofit industry to garner new clients and take existing clients to even greater heights. With NMBL Strategies Casey has led the staffing and fundraising efforts for America's Black Holocaust Museum, the International Association of Black Actuaries, and Cherokee Street CID, as well as efforts across several other NMBL projects.

## How to Transform Workplace Giving Donors into Mission Champions

*Classroom 120*

In 2023, the National Multiple Sclerosis Society created a structured stewardship program for Workplace Giving Donors. After over a year of quarterly stewardship outreach, we added a prospecting component and shared prospects with frontline fundraisers. Several of these donors have become mission champions, through the connections made by team members from Individual Giving and Corporate Engagement. Learn about how we structured this program, what some of our setbacks were, and how we grew the program into a cultivation powerhouse.



**Teri Brickey** has worked in development for over ten years, in a variety of organizations from higher education to the arts. In her role at the National MS Society, she works cross-functionally to innovate and explore ways to expand the reach of the Society and grow revenue through new and existing donors. Her work in development has allowed her to bring strengths from her previous work in politics, hospitality and massage therapy.

## Gephardt Institute St. Louis Fellows: Impact of Community Partnership

*Classroom 130*

This session will feature the Fellows Program of the Gephardt Institute for Civic and Community Engagement at Washington University in St. Louis. The Fellows are a select group of undergraduate students who dedicate a summer to St. Louis by working full-time in nonprofit or civic internships and engaging in experiential learning to enhance their knowledge of St. Louis history, culture, and politics. Stipends for the internships are provided by the Gephardt Institute, which allows any student to apply and participate, and makes hosting a highly skilled Fellow possible for organizations of all sizes. Fully funded through philanthropy, the program inspires students and donors to invest in the St. Louis community and contribute to mission-critical efforts that improve quality of life for all St. Louisans. Speaker/moderator Stephanie Kurtzman will provide an overview of the program since its inception in 2008 and will share insights into its continued

growth and impact. Stephanie will be joined in the session by two current fellows and their host organizations who will share their own perspectives on what makes the program so valuable for student civic leadership development and community impact. The session will demonstrate what is possible through unique and innovative community partnerships and highlight the impact philanthropy to one organization can have on the entire community.



**Stephanie Kurtzman** leads the Gephardt Institute for Civic and Community Engagement at Washington University in St. Louis. The Gephardt Institute catalyzes student learning, participation, and impact in civic life, with a vision that WashU students will graduate prepared and committed to lead positive change. Stephanie earned her Master of Education in Higher Education and Student Affairs Administration from The University of Vermont, and her Bachelor of Arts from Occidental College.

### Getting to the Suite Spot

*Clark Fox Forum Atrium*

"Getting To The Suite Spot" is a dynamic and practical workshop designed to empower nonprofit fundraising professionals to strategically advance their careers and fundraising results. Participants will explore what it means to lead from wherever they are, understand how to position themselves for top-level roles, and gain tools to influence organizational strategy, donor engagement, and leadership culture.



**Cynthia D. Danley, MA, MBA**, is an international best-selling author, entrepreneur, and seasoned nonprofit leader with over 30 years of experience in strategic planning, fundraising, and community engagement. As CEO of Safe Connections, she spearheaded initiatives to expand programs, strengthen financial sustainability, and enhance staff retention. Renowned for her ability to build impactful partnerships and drive social change, Cynthia also serves on prominent state commissions and nonprofit boards, where she passionately champions equity and community well-being. As a member of Delta Sigma Theta Sorority, Inc. she is engaged in social action efforts and has held several leadership positions.





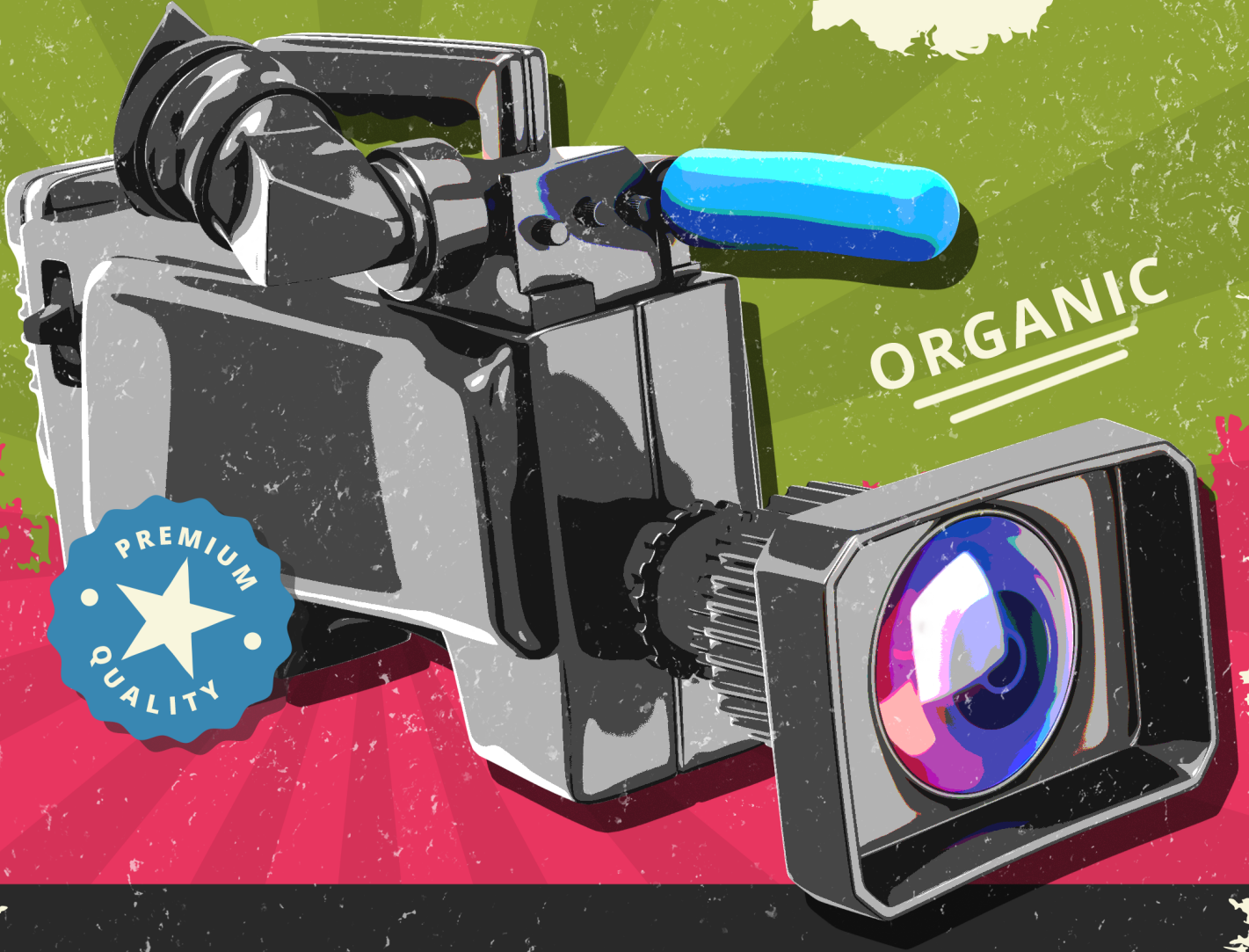
# WINE & CHEESE RECEPTION

4:30 – 5:30 PM  
2nd Floor  
Atrium & Patio

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# HONORING THE PAST, SHAPING THE FUTURE

## STL50

### NATIONAL PHILANTHROPY DAY

"Philanthropy" means love of humankind. As part of AFP St. Louis' 50th anniversary, **we honor those who demonstrate commitment, talent, and generosity** toward helping society at our annual National Philanthropy Day luncheon.

Join us for an outstanding event recognizing what's good in our region, featuring guest speakers June and Flint Fowler, and emceed by Today in St. Louis co-anchor, Rene Knott.

Changemaker: **Anthony "Tony" Thompson**

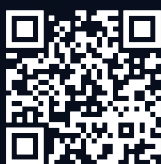
Outstanding Philanthropist: **The Schnuck Family & Schnuck Markets, Inc.**

Outstanding Fundraising Volunteer: **Linda Hunter**

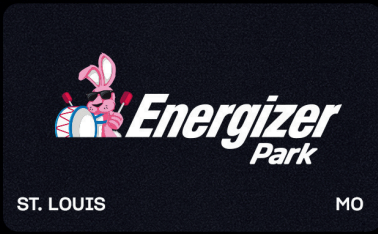
Outstanding Fundraising Professional: **Bret Heinrich, MFA, CFRE**

Outstanding Emerging Professional: **Lauren Finan**

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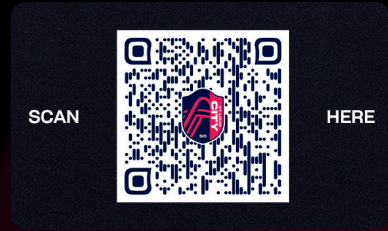
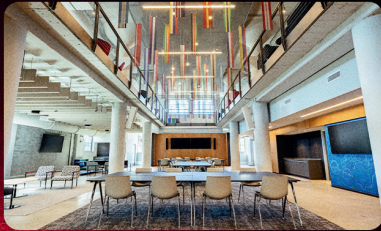


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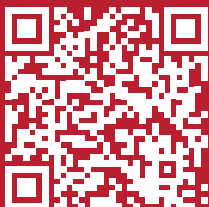
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Assistant Director of Data Management

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