



AFP TAMPA BAY

3RD ANNUAL CONFERENCE

SEPTEMBER 20 – 21, 2021

Reservations Required – www.afpsuncoast.org

Limited scholarships available for those facing hardship – please reach out to Chandra at chandra@afptampabay.org

Monday - September 20, 2021 - 3:30 ~ 5:30 p.m. ~ ZooTampa

- ❖ Conference Welcome ~ *Inspiring Change* ~ Curtis Campogni, Speak4MC
- ❖ Beer, Wine and Hors d’oeuvres
- ❖ Head Shots provided by ZooTampa at Lowry Park

Tuesday - September 21, 2021 - 9:00 ~ 1:00 p.m. ~ Virtual - Zoom

Three Sessions Available – Please choose which one to attend, all sessions include Monday.

YOUNG/NEW IN THE PROFESSION TRACK \$35.00 – AFP Members \$50.00 – Guest	VETERANS TRACK \$75.00 – AFP Members \$90.00 – Guest	NEW- CEO/ED/CDO TRACK Moderated by Karen Eber Davis, Karen Eber Davis Consulting \$99.00 – AFP Members \$125.00 - Guest
<p>9:00 a.m. Session 1 Expressing Gratitude Across Various Media to Garner Future Donations ~ Audra Vaz We all know that we should thank donors, but what are the best words to use and through which medium? Are phone calls worth the effort? Is the advent of texting effective in terms of stewardship? Are donors more likely to give again if the message is focused on their generosity or the benefit realized by the recipient?</p> <p>In a recent study, other-praising and self-benefit expressions of gratitude were examined, and the results may surprise you. In this session, we’ll discuss how annual giving donors respond to phone calls, voicemails and text messages, and whether vanity or altruism leads to subsequent giving.</p>	<p>9:00 a.m. Session 1 Walk the Talk... How to Reflect DEI in Your Fundraising Communications ~ Marissa Moran Gantman Practical tips for fundraisers when it comes to using communications channels and tactics for reaching your audience, including an explanation of:</p> <ul style="list-style-type: none"> • Ethical and human-centered storytelling • Creating emotional engagement among donors in a way that is inclusive, representative, and fair to those you’re serving • Visual storytelling and examples of what to do and not to do including real-life scenarios • Avoiding stereotypical imagery • Matching your photos to your words and DEI commitment • Brief overview of website accessibility tips 	<p>9:00 a.m. – 10:15 a.m. What do CEO’s/CDO’s Need to Know About Managing a Successful Fundraising Department ~ Vicki Pugh, CFRE, CAP and Katherine C. Green What metrics does your team need to track your development success? Are there other signs that something is going well or wrong? Besides exploring these questions, this session will delve into board interactions, micromanaging relationships, and chief development officer retention. We’ll touch on fundraising trends including what’s new with Donor Advised Funds plus answer your executive-level questions about the mechanics of fundraising.</p>

<p>10:00 a.m. Session 2 Fundraising Hacks for Self-Management: Five Tips for Personal & Professional Sanity ~ Michelle Turman</p> <p>There are countless strategies to be successful in the fundraising industry. From building lasting relationships with prospects and stewarding donors, to successfully planning and executing gift requests, there are always steps to take to maximize your results. Balancing fundraising strategy is often prioritized over the importance of managing yourself. Michelle Turman, MA, CFRE and President & CEO of Catalyst Consulting Services has over two decades of experience working with development professionals across all nonprofit sectors and one fact is glaringly clear: Managing time and actions effectively makes the difference between a spectacular fundraiser and one that merely gets the job done.</p>	<p>10:00 a.m. Session 2 Fundraising Hacks for Self-Management: Five Tips for Personal & Professional Sanity ~ Michelle Turman</p> <p>There are countless strategies to be successful in the fundraising industry. From building lasting relationships with prospects and stewarding donors, to successfully planning and executing gift requests, there are always steps to take to maximize your results. Balancing fundraising strategy is often prioritized over the importance of managing yourself. Michelle Turman, MA, CFRE and President & CEO of Catalyst Consulting Services has over two decades of experience working with development professionals across all nonprofit sectors and one fact is glaringly clear: Managing time and actions effectively makes the difference between a spectacular fundraiser and one that merely gets the job done.</p>	<p>10:30 a.m. – 11:45 a.m. Judy Lisi, President and CEO & Julie Britton, Vice-President Development, David A. Straz Jr. Center for the Performing Arts</p> <p>Having a successful relationship between the CEO and CDO can be an important part of an organization’s ability to reach its fundraising potential. Determining the appropriate balance of time for the CEO to spend on fundraising, managing and retaining a great CDO/DD and aligning positions and visions to create a highly productive fundraising team are essential. Judy Lisi, President and CEO, and Julie Britton, EVP of Development, share their 20+ year experience of working together in these roles.</p>
<p>11:00 a.m. Session 3 Exploring What is Next ~ Merrill Stewart</p> <p>Exploring different career paths within fundraising- annual giving, planned giving, etc. What does the title mean as it relates to career planning?</p>	<p>11:00 a.m. Session 3 Hiring & Diversity – How are we (nonprofits) addressing diversity in hiring? ~ Jamie Renee</p> <p>Multiple studies have shown that organizational diversity, no matter the industry, can bring in bigger profits, strengthen business processes, and achieve greater outcomes. So then, why do recent reports suggest that 82% of nonprofit employees are white. What are the barriers preventing people of color from joining nonprofits? And, more importantly how do we address them?</p>	
<p>Noon – KEYNOTE Fireside Chat about CEO-CDO Relationships with Legendary USF Leaders Dr. Judy Genshaft and Mr. Joel Momberg – Together they orchestrated a billion-dollar campaign together</p>	<p>Noon – KEYNOTE Fireside Chat about CEO-CDO Relationships with Legendary USF Leaders Dr. Judy Genshaft and Mr. Joel Momberg – Together they orchestrated a billion-dollar campaign together</p>	<p>Noon – KEYNOTE Fireside Chat about CEO-CDO Relationships with Legendary USF Leaders Dr. Judy Genshaft and Mr. Joel Momberg – Together they orchestrated a billion-dollar campaign together</p>
<p>1:00 p.m. – Adjourn</p>	<p>1:00 p.m. - Adjourn</p>	<p>1:00 p.m. - Adjourn</p>



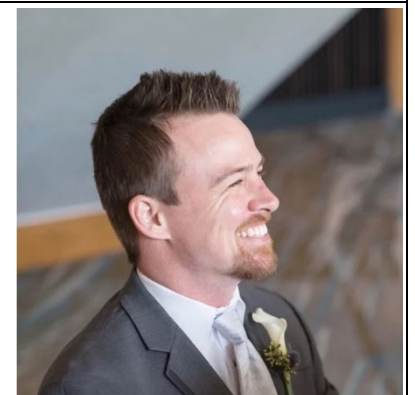
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SPEAKER BIOS

Julie Britton, *Executive Vice President of Development* – DAVID A. STRAZ, JR. CENTER FOR THE PERFORMING ARTS. Julie Britton joined the Straz Center in 1991 as associate director of development, responsible for grant writing and special events. In 1995, she was named Director of Annual Giving, where she oversaw annual private sector fundraising activities. Britton was named Vice President of Development in 2001, and Executive Vice President of Development in 2018 and now oversees all fundraising efforts for the Straz Center and TBPAC Foundation, including annual giving, endowment, major gifts and planned giving, capital projects and government relations. She is an active participant in the Performing Arts Center Consortium's national Development group. She holds a Bachelor of Arts degree in business and English from Wittenberg University and received her M.B.A. from The University of Tampa. She has served on the Wittenberg University National Alumni Board and received the Wittenberg University National Alumni Citation Award. She has also been active in Leadership Tampa, the Junior League of Tampa and numerous other community projects.



Curtis Campogni (Founder of Speak4MC) began working with the most at-risk teens in Florida in 2014. Seeking a new tool to engage and retain them, Curtis discovered the power of MI and it quickly became the sharpest tool in his belt. Since then, Curtis has provided training and coaching in MI for professionals who serve court involved juveniles, WIOA out of school youth, and dislocated workers. He's inspired leaders across Florida, North and South Carolina, New York, Louisiana, Georgia, and Maryland, presenting MI at numerous juvenile justice and national workforce board conferences. Believing in the power of multiplication for sustained impact, Curtis assisted in developing 'train the trainer' programs for foster care, workforce development, and departments of correction. He received a 96% satisfaction rate from 110 correctional officers at the South Carolina Department of Corrections in 2019.



Over the last 15 years Curtis has transitioned from a group home youth care worker to Transition Director for Central Florida serving 165 at-risk youth daily across twenty (20) counties. Curtis has experience speaking about fundraising, program growth, client successes, and project implementation, in addition to hosting large scale award ceremonies, fundraisers and workplace retreats.

Curtis excels at emotionally connecting with his audience and making mundane topics exciting. Curtis started Speak4MC with the goal of reaching thousands of professionals across the country who serve customers in need of empathetic, compassionate and goal oriented assistance.

Karen Eber Davis is the award-winning thought-leader, advisor, and founding principal of Karen Eber Davis Consulting. She helps nonprofit leaders get answers, generate revenue, and grow results. Davis is known for her innovation and practical approaches based on her work with or visits to 1,000 nonprofits. She is the author of [7 Nonprofit Income Streams](#) and [Let's Raise Nonprofit Millions Together](#). Get Karen's free *CEO Solutions* newsletter [here](#).



Marissa Gantman has been operating at the intersection of communications and social impact for the past decade. She helps nonprofit and mission-driven organizations craft their stories in order to achieve strategic objectives. Currently Associate Managing Director of Marketing at the Pacific Council on International Policy in Los Angeles, California, Marissa oversees brand management, media relations, and content curation for the nonprofit's membership community.

Prior to her role at the Pacific Council, she worked on an array of projects that bridged strategic communications, media, and global impact, including the launch of the Skoll Center for Social Impact Entertainment at UCLA. Marissa has worked for communications and PR agencies both in Los Angeles and London, UK, where she specialized in media freedom and journalist safety in conflict zones. She has conducted media research in East Africa, Central Asia, Southeast Europe, and the Caucasus and worked with clients including the UN, OSCE, DFID, and USAID. Marissa graduated Summa Cum Laude in Political Communication and International Affairs from the George Washington University and holds a MSc with distinction in Media, Communications, and Development from the London School of Economics. She is an Americorps alumna.



Judy Genshaft - During her historic 19-year presidency, from 2000 to 2019, Dr. Judy Genshaft catapulted the University of South Florida to statewide, national and international prominence for student success, academic rigor, research, innovation and economic development. Her leadership of USF's billion dollar "Unstoppable" capital campaign is legendary. In 2019, the Judy Genshaft Honors College was established in recognition of an historic \$20 million gift from Genshaft and her family. That gift, along with many others during her tenure, gave President Emerita Genshaft the distinction of being the most philanthropic university president in the nation.



Katherine (Kitty) C. Green, Vice President for Advancement, FGCU Foundation Executive Director - Florida Gulf Coast University. Kitty Green joined Florida Gulf Coast University in 2019. She is responsible for the Foundation fundraising team, Alumni Association, University marketing and communications, WGPU public media and FGCU Academy lifelong learning. A lifelong Lee County resident, her career developed in parallel with the 24-year old university.



Green spent 20 years developing master planned communities in Bonita Springs, Florida. She held leadership positions at Westinghouse Communities and Bonita Bay Group, culminating as CEO of Bonita Bay Group which was one of the largest privately held developers in Florida with 9,000 units sold. When the Great Recession devastated the local development industry, Kitty took the helm of her longtime favorite charity, Habitat for Humanity of Lee and Hendry Counties in 2010. Under her leadership the organization was in the top 1% of producing affiliates nationally, and held the top Charity Navigator rating for accountability and transparency.

Green received her undergraduate and graduate degrees in business from the University of South Florida.

Judith Lisi, *President & Chief Executive Officer* - DAVID A. STRAZ, JR. CENTER FOR THE PERFORMING ARTS. Judith Lisi joined the Straz Center in 1992. Through her leadership, The Straz has significantly expanded its programming, established financial stability, retired an accumulated debt, and has met the goals of three five-year, long-range plans. Lisi's arts management philosophy includes a belief in, and a commitment to, the community and to ensuring outreach, accessibility, and audience development for the entire community through multicultural and educational programming.



Lisi has directed more than 40 productions and has written six plays. She holds a Master's Degree in theater and communication arts from St. Louis University, and has done doctoral work in theater at the University of Minnesota. She studied opera at the Juilliard School of Music and with the Metropolitan Opera. Previously, as Executive Director of the prestigious Shubert Performing Arts Center in New Haven, Connecticut, the Shubert enjoyed artistic and financial success.

In May 2002, the League of American Theatres and Producers honored Judy with the Samuel J. L' Hommedieu Presenter of the Year Award for "bringing the magic of live theater to thousands of area residents through a variety of audience development and education programs." In January 2008, Judy received the prestigious Patrick Hayes Award for Lifetime Achievement from ISPA, the International Society for the Performing Arts.

Joel Momberg - As CEO of the University of South Florida Foundation, Joel Momberg accomplished the quintessential fundraising achievement, a billion dollar "Unstoppable" capital campaign. He came to USF from the All Children's Hospital Foundation where his multiple roles were capped by over a decade as Executive Vice President. Having retired from USF, his alma mater, in 2019, he is living his next chapter as an author, publishing his novel "Sammy" about his dad, followed by his latest book "For Those Who Can."



Vicki Pugh, an executive leader and career fundraiser, Vicki Pugh has led teams that have raised more than \$300 million for organizations in Florida and New York City, including the New York City Opera, Carnegie Hall, Ballet Florida, YMCA, and Palm Beach Atlantic University. She is well versed in all areas of advancement, including annual and capital campaigns, major gift development, planned giving, board management, and strategic planning.



Currently Vice President for Philanthropic Giving at the Community Foundation for Palm Beach and Martin Counties, Vicki assists donors in maximizing their impact on the community through philanthropic planning and grant making. Vicki is a Faculty Member of The Fundraising School of the Indiana University Lilly Family School of Philanthropy, teaching courses in leadership, major gifts, capital campaigns, and fundraising fundamentals. She holds the CFRE and CAP credentials. Vicki is a board member of Palm Beach Philanthropy Tank, Planned Giving Council of Palm Beach, and William T. Dwyer High School Foundation. She served as President of the Association of Fundraising Professionals Palm Beach County Chapter and received the organization's Outstanding Fundraising Professional award in 2019. Vicki serves on the endowment committee of Holy Spirit Lutheran Church and is a past board member of the Chamber of Commerce of the Palm Beaches. She hails from Evansville, Indiana and is a graduate of DePauw University. Along with her rock star husband Tim and two amazing daughters, Ali and Grace, Vicki resides in Jupiter, FL.

Jamie Renee, CEO, Good Day Solutions ~ Jamie has a heart for humanity and a mind for business. Korn Ferry ranked her business acumen in the top 2.5% of executive leaders worldwide. She has served in leadership roles within Home Depot, OAI, The Children's Home, United Way and Habitat for Humanity. Now, she is applying her more than 25 years of corporate and nonprofit leadership experience to increase productivity, grow profits, and achieve uncommon success for her clients at Good Day Solutions.



Professional Credentials:

- Bachelor of Arts in Marketing | University of North Florida
- Ranked in Top 2.5% of Business Thinkers/Acumen worldwide | Korn Ferry
- Certified in Social Responsibility Planning | Yale
- Certified in Crisis Management | University of South Florida
- Certified in Culture Creation | Harvard
- Certified in Strength-based Coaching | Gallup
- Certified in Diversity, Equity, and Inclusion | Belongify
- Certified in Sales Coaching | Sandler & Business-Rich
- Disc Assessment Trainer
- Masterful Meeting Trainer

Merrill Stewart, CFRE - Ms. Stewart established Marketing & Business Solutions LLC in 2012. The company specializes in: nonprofit fundraising, marketing, public relations, cause marketing, corporate communications, social media planning and implementation, event production/promotion/planning, business development, strategic planning, fundraising plan strategy, and implementation. The company provides a tailored approach for all of its clients to meet their specific needs with a customized plan, professional recommendations, and a thorough and integrated approach.



Ms. Stewart has over 18 years experience in the nonprofit sector includes working for and with clients such as: Children's Home Network, Boys & Girls Clubs (Manatee, Pinellas and Tampa), St. Joseph's Hospitals Foundation, Gulf Coast Jewish Family & Community Services, Early Learning Coalition of Pinellas County, Healthy Start Coalition of Pinellas County, 2-1-1 Tampa Bay Cares, Plato Academy of Charter Schools, as well as international and domestic organizations. Ms. Stewart also has over 15 years in the for-profit sector including work with Clear Channel Communications - Radio, Tampa and Sarasota/Bradenton markets, Research, Banking, and Customer Service. She has planned and implemented comprehensive marketing campaigns and promotions, developed strategic corporate partnerships, brand positioning, marketing and communications planning, advertising planning and market

analysis to help grow area businesses. Ms. Stewart is a member of the Association of Fundraising Professionals (AFP) and was a Board Member of Nonprofit Consultants Connection.

Ms. Stewart holds a B.S. in Marketing and a B.S. in Accounting from the University of South Florida. She holds a certification from CFRE International as a Certified Fund Raising Executive since 2017.

She has been trained in the Benevon Fundraising Model Training and the Red Rock Leadership Sales Training Program. She has won several awards for her leadership and community involvement, including from Sertoma International and the American Red Cross. Ms. Stewart currently serves as a Board member on the Association of Fundraising Professionals (AFP) Florida Caucus; is a member of the local Tampa Bay AFP Chapter and is a member of the Florida Nonprofit Alliance.

Michelle Turman, MA, CFRE is the President & CEO of Catalyst Consulting Services whose mission is to facilitate positive change in the areas of executive searches, organizational management, and fundraising. With over twenty-eight years of nonprofit experience, Turman has been responsible for increasing the impact and best practices of nonprofit organizations she serves and has raised over \$80 million for the Tampa Bay community through her professional and personal philanthropic efforts. Turman currently serves on the Cultural Arts Commission of Hillsborough County and USF's College of Arts and Science Advisory Board. Turman recently made two gifts to USF: one to establish the Turman Study Abroad Scholarship and one to the new Irritable Bowel Disease Center and Nurses Station, becoming the first female donor to the capital effort.



In addition to facilitating change nationally, Turman's community service has included leadership roles on the boards of the Arts Council, Suncoast Chapter AFP Chapter, Centre Club's Philanthropy Committee, Charitable Gift Planners of Tampa Bay, Donate Life America, Leadership Pinellas, the South Tampa Y and USF's Women in Leadership & Philanthropy, the Women's Exchange (WE), and Working Women of Tampa Bay Foundation. Turman has been recognized by Tampa Bay Metro Magazine as one of Tampa Bay's *Distinguished Women in Business* and the *Face of Nonprofit Change*, nominated by Tampa Bay Business Journal as *Business Woman of the Year*. Her company was recently recognized by the Greater Tampa Chamber of Commerce as *Outstanding Small Business Leader of the Year*.

Turman is author of the best-selling book, *Jumping the Queue – Achieving Great Things Before You Are Ready* which focuses on how young professionals can seize personal and professional opportunities, achieve great things, and get what they want and deserve. Turman is an educational trainer at the Edyth Bush Institute for Philanthropy & Nonprofit Leadership at Rollins College and specializes in professional education in the areas of executive transitions, change management, capital campaigns, volunteer management, board governance, and fund development.

Audra Vaz is the Assistant Dean for Advancement and Senior Director of Development for the School of Music and the Koger Center for the Arts. She oversees the fundraising and communications functions in each, with the goal of developing philanthropic relationships with both entities' many communities.



Audra has nearly 30 years of fundraising and communications experience. She previously worked at Appalachian State University and Florida Atlantic University in both their Arts/Music programs, as well as for several nonprofit organizations with missions dedicated to residential foster care, development disabilities, and disaster relief.

She holds a BS in Communications from Grand Valley State University, a Master of Nonprofit Management from Florida Atlantic University, and is a doctoral candidate at Appalachian State University. Her research area examines expressions of gratitude and how they may influence giving.

Audra lives in Columbia SC and enjoys travel, tennis, and animals. She's married to Johann, and they have two adult children Brenna and Derrick.