Planned Giving Roundtable of Southeast Michigan

# Development Day Agenda

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| Track 1 | Leadership | |
| Track 2 | Administering Gifts | |
| Track 3 | Deep Dive | |
| Plenary | Plenary | Room: VT500 |

## Wednesday, June 03, 2026

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| 8:00 am<br>8:15 am | | Registration Opens/Networking/Continental Breakfast<br><br>Welcome/Opening Remarks |
| | Exhibits Open | **Opening Plenary (Room VT 500)** |
| 8:30 - 9:30 am<br>Room VT500 | | **Curiosity Code: Building a Culture of Curiosity to Thrive in the AI Era**<br>Nathan Chappell MBA, MNA, CFRE, AIGP, Chief AI Officer, Virtuous<br><br>In a time of rapid technological change, the most successful nonprofit professionals won’t be the ones with all the answers—but the ones who ask the best questions. Curiosity is the key to innovation, adaptability, and meaningful impact, yet too often, organizations prioritize efficiency over exploration. As artificial intelligence reshapes the way we work, the ability to think critically, challenge assumptions, and seek new possibilities will determine who thrives in this new era. |
| 9:30 - 9:45 am | | Break |

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| | | **Morning Breakout Tracks** |
| | Exhibits Open | **Session 1** |
| 9:45 - 10:45 am<br>Room VT500 | | **From Awkward to Aligned: The Science of Communication in Fundraising - Human Hard Wiring**<br>Melissa Goodson, Consultant/Chief Development and Communications Officers, BeeGood<br><br>Human Wiring is an interactive introduction to natural communication and motivation styles. This session helps you understand:<br>• What drives and motivates your donors, colleagues, and team members<br>• How different people prefer to receive information, make decisions, and feel valued<br>• Your own natural communication style—and how it shows up under pressure<br>• Why adapting your style is not “inauthentic,” but strategic leadership<br>When you understand human wiring, communication stops feeling like guesswork and starts feeling intentional. |
| 9:45 - 10:45 am<br>Room VT460 | | **Fundraising Audits 101: Assessing Readiness, Strengthening Strategy, and Preparing for Growth**<br>Rick Kress, ACFRE, Principal, Kress Consulting<br>Laura Tomassi-Miller, Principal, Upwell Fundraising Advisory<br><br>A fundraising audit is often the most effective-yet most overlooked-tool for strengthening development programs and preparing organizations for future growth. This session introduces the fundraising audit as a powerful diagnostic tool for evaluating development performance, identifying gaps, and setting realistic growth strategies. Participants will learn what to review, which stakeholders should be involved, and which metrics truly matter. Presenters will discuss the role of consultants in conducting |

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| | | audits, including when an external perspective adds value over an internal review. The session will conclude with an anonymized case study from a recent audit, highlighting common findings, strategic recommendations, and how audit results can serve as a smart precursor to campaign planning. |
| 9:45 – 10:45 am<br>Room VT425 | | **Navigating Your AI Transformation**<br>Nathan Chappell MBA, MNA, CFRE, AIGP, Chief AI Officer, Virtuous<br><br>"Navigating Your AI Transformation," offers a deep dive into the ongoing journey of AI integration within organizations, particularly focusing on its implications and opportunities in the fundraising sector. It discusses the evolution of AI technologies like predictive and generative AI, emphasizing their potential to enhance donor experiences through precision, personalization, and efficiency. |
| 10:45 – 11:00 am | | **Break** |
| | | **Session 2** |
| 11:00 am - 12:00 pm<br>Room VT500 | | **Integrating Planned Gifts into Capital Campaigns and Major Gift Portfolios**<br>Bobie Clement, CFRE, Senior Associate Consultant, Marts&Lundy<br><br>This session will provide actionable strategies for seamlessly integrating planned giving conversations and commitments into ongoing capital campaigns and major gifts efforts. Attendees will learn how to identify and engage planned giving prospects, utilize tailored communication approaches, and implement stewardship plans that foster long-term relationships. The presentation will also highlight practical methods for tracking and reporting blended gifts, illustrated by real world campaign examples and key lessons learned. Designed for mid-career and expert fundraisers. |
| 11:00 am - 12:00 pm<br>Room VT460 | | **Planned Giving When You Wear Twelve Hats Already**<br>Heidi Boyd, Planned Giving Officer, Michigan Humane<br>George Westerman, Sr. Philanthropy Director, Gift Planning Trinity Health<br><br>Planned giving can feel like a "someday" strategy – right up there with hiring more staff and finding time to breathe. If you work at a small nonprofit, or if planned giving has quietly become part of your job description, this session is for you. In this practical presentation, planned giving pros break down what planned giving really means for smaller organizations, without legal jargon or unrealistic expectations. We'll cover the most common gift types in plain English, explain how planned giving differs from annual and major gifts, and explore why even small nonprofits should give it a closer look. |
| 11:00 am - 12:00 pm<br>Room VT425 | | **Utilizing Donor Advised Funds as Part of an Estate Plan**<br>Randy Ross, Vice President, Donor Services, Community Foundation for SEM<br>Greg Yankee, Vice President, Foundation Counsel, Community Foundation for SEM<br><br>The growing popularity of donor advised funds means that fund sponsors can be part of the equation for donors' estate gift intentions. Sponsoring organizations are improving conversations with donor advisors about succession planning for their fund, but there is more that can be done. CFSEM can talk about recent policy changes that make a DAF more appealing as part of this conversation, and we can share case examples.<br><br>Mid-career to Expert |
| 12:00 pm | **Buffet Lunch** | |

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| | | **Afternoon Breakout Tracks** |
| | | **Session 3** |
| 1:00 - 2:00 pm<br>Room VT460 | Exhibits Open | **Philanthropy for All: Building a Culture that Engages Everyone**<br>Sheryl Gray, MPA, CFRE and Joe Zakens<br>Wayne Metropolitan Community Action Agency - Fund Development Managers<br><br>Drawing on real-world experience, this session will discuss how leadership, program staff, and boards can work collaboratively to support fundraising and relationship-building efforts. Participants will gain practical strategies to strengthen internal culture, increase employee engagement, and foster cross-departmental collaboration that ultimately benefits donors, clients, and the organization as a whole. |
| 1:00 - 2:00 pm<br>Room VT425 | | **Bringing Philanthropy Home for Your Highest-Capacity Clients and Donors**<br>Phil Cubeta, CLU, ChFC, MSFS, AEP, CAP<br>Chartered Advisor in Philanthropy Founder \| Philanthropy Offerings<br><br>Phil Cubeta has taught legacy planning to over two thousand advisors and nonprofit gift planners in the Chartered Advisor in Philanthropy program at The American College of Financial Services. His message is timely; over $150 trillion is slated to pass to heirs and charities over the next 25 years. In this presentation, he will demonstrate how advisors and gift planners can use a baseball analogy to help clients and donors touch all the bases as they hit a legacy home run. |
| 1:00 - 2:00 pm<br>Room VT500 | | **Marketing Planned Giving Without Selling Products: A Donor-Centric Framework for Positioning Gift Planning**<br>Ryan Bladzik, CFRE, Founder/Principal Consultant, ImpactWorks Nonprofit Solutions<br><br>This session introduces a donor-centered way of thinking about planned giving marketing—one that begins with donor motivations, priorities, and concerns rather than financial instruments. By reframing gift planning options around the why behind a donor's decisions, fundraisers can more naturally connect personal goals to mutually beneficial philanthropic outcomes. |
| 2:00 - 2:15 pm | | Break |
| | **Afternoon Plenary (VT 500)** | |
| 2:15 -3:30 pm<br><br>Room VT500 | Exhibits Open | **Listening for Legacy Across Generations**<br>Phil Cubeta, CLU, ChFC, MSFS, AEP, CAP and Brenda Marie Turner, Soprano, CFRE<br><br>What is on your legacy playlist? What is on your legacy-age donor's? As different as our tastes may be, can tap we tap our foot to each other's favorite legacy tune? In this interactive presentation, using songs and a dramatic monologue, you will listen for legacy across generations. You will leave with practical insights and a renewed sense of purpose. |
| 4:00 pm | | Conference Ends |

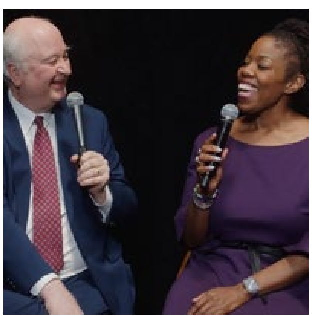
# Plenary Speakers

## Nathan Chappell MBA, MNA, CFRE, AIGP, Chief AI Officer, Virtuous

Nathan Chappell is a thought leader, public speaker, author, and AI inventor, recognized globally as an expert on the intersection of Artificial Intelligence and generosity. Nathan serves as Chief AI Officer at Virtuous Software where he supports AI integration to help nonprofit organizations amplify mission at scale. In 2018, Nathan founded Fundraising.AI, the world's largest global advocacy organization for Responsible and Beneficial AI in the nonprofit sector. Additionally, he is author of two books, *Nonprofit AI: A Comprehensive Guide to Implementing Artificial Intelligence for Social Good* and the 2022 award-winning book, *The Generosity Crisis: The Case for Radical Connection to Solve Humanity's Greatest Challenges*, which has been deemed "required reading for this generation of fundraisers". With over 20 years of nonprofit leadership experience, Nathan is a global keynote speaker and content contributor. His work has been featured in NPR, *The Chronicle of Philanthropy*, *Forbes*, *Fast Company* and more. His podcast, *Fundraising AI*, is among the top nonprofit technology podcasts worldwide.

Nathan serves as an advisor for the OpenAI Users Forum, the AI for Good Foundation, the International Committee for Information Technology Standards (INCITS), and the Forbes Technology Council.

He holds a Masters in Nonprofit Administration from University of Notre Dame, an MBA from University of Redlands, a certificate in International Economics from University of Cambridge, a certificate in Artificial Intelligence from MIT, a certificate in Philanthropic Psychology from the Institute of Sustainable Philanthropy, is a certified fundraising executive (CFRE) and holds a credential by IAPP as an AI Governance Professional (AIGP).



## Phil Cubeta, CLU, ChFC, MSFS, AEP, CAP
## Brenda Marie Turner, Soprano, CFRE

Phil served for 12 years as the Wallace Chair in Philanthropy at The American College of Financial Services, where he was responsible for the Chartered Advisor in Philanthropy (CAP®) designation. During his tenure, over 2,000 advisors and nonprofit gift planners received this designation.

Before joining The American College, Phil served as Chief of Staff for The Nautilus Group, a service of New York Life Insurance Company providing estate, business, and philanthropic strategies to affluent clients through 200 of the company's top agents. Phil's original training was in English Literature, Williams College, BA; Philosophy and Psychology, Oxford University, MA; and English Language and Literature, Yale, MA, M.Phil. He also holds a Master of Science in Financial Services (MSFS) from The American College.

Phil was inducted in 2022 into the Charitable Gift Planners Hall of Fame.

**Brenda Marie Turner, Soprano, CFRE**
Brenda studied classical voice at Stetson University and film at Northwestern University. She has performed professionally in the States and internationally. She has been a soloist at the Berlin Philharmonic, Atlanta Symphony Orchestra, with 4Spiel String Quartet, and the Nairobi Girls' Chorale (Kenya).

Brenda is also a CFRE with nearly two decades of nonprofit fundraising experience. In addition to leading her firm, Turner Divine Consulting, she serves as Director of Regional Philanthropy for Springboard Collaborative, a national nonprofit promoting literacy. She serves on the board of AFP-NYC and on the advisory board of Stetson University's School of Music.

Via her fiscally sponsored project, Open The Music, Brenda tours the country, offering community concerts with themes of love, unity, and harmony.

## Registration

**PGRTSEM Member…………………… $150**
**Organizations with 3 or more…………………………………………$150/guest**
**Conference + Membership……. $210**
**Guest………………………….……….. $275**

Get a discount on above pricing and register early until April 24th!

**Track Descriptions:**

**Administering the Gifts:** These sessions may be best for those who need the planned giving basics or those who want to hear it again and learn it better. Sessions about case studies, specific gift types and techniques for soliciting them, and how planned gifts may fit into the broader development picture at an attendee's organization.

**Diving Deep:** These sessions may be best for those seeking technical information and legal/financial education, and for those wanting to tackle some of the big issues in estate planning. Likely best fit for planned gift professionals whose roles focus solely on legacy and estate giving, or for attendees from legal or financial advisory roles.

**Leadership & Careers:** These sessions focus on professional development, personal growth, cross-departmental collaboration, or career paths in and outside of planned giving. Sessions may also provide content for those attendees working with annual or major donors but wanting to practice planned gift solicitation skills and should be helpful to anyone who wants to hone conversation, relationship building, and listening skills.

**Continuing Education:**

**Pending Approval** for CFRE CE Credits.

Some sessions are being recorded (but not broadcast).

**Valuable Connections:** Multiple opportunities to make valuable connections and learn along with 200 or more of your gift planning colleagues.

**Customized Experience:** Whether you are new, wanting a refresher, or needing technical expertise, you can customize your experience in the sessions to get what you need the most.

**Conference Location:**
VisTaTech Center
Schoolcraft College
18600 Haggerty Road
Livonia, MI 48152

**A fabulous venue with free parking!**

**Conference Hotel:**
Hyatt Place
19300 Haggerty Road
Livonia, MI 48152
(734) 953-9224
(888) 492-8847
Conference rate available until May 15th

Link to Register
Room Block Name: **G-PG26**

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