



**THE LEADING  
EDGE OF  
PHILANTHROPY  
CONFERENCE**

For Chief Development  
Officers and Vice Presidents  
of Advancement

January 11–12, 2024



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**Online agenda and conference website:**



# Agenda

## Thursday, January 11

- 8:30 a.m. Breakfast
- 9:00 a.m. Welcome & Conference Overview
- 9:30 a.m. **Aligning AI to Organizational Needs**  
*Josh Birkholz, BWF*
- 10:30 a.m. Break
- 10:45 a.m. **Creating a Donor Experience**  
*Mo Cotton Kelly, UConn Foundation*  
*Rod Grabowski, University of Central Florida Foundation*  
*Bob Guitard, BWF*  
*Katrina Klapproth, BWF*
- 11:30 a.m. Lunch
- 12:30 p.m. **Navigating Family and Entrepreneurial Wealth**  
*Jackie Lewis, University of Missouri-Columbia*  
*Joel Stephens, Thomas Financial*  
*Mark Marshall, BWF*
- 1:30 p.m. Break
- 1:45 p.m. **Leveraging Big Idea Priority Development**  
*Colleen Garland, Kenyon College*  
*Karl Miller-Lugo, University of Texas at San Antonio*  
*Jeff Hilperts, BWF*
- 3:00 p.m. Break
- 3:15 p.m. **Managing Risk and Safeguarding Missions in Higher Education**  
*Jason Boley, BWF*

- 4:00 p.m. Day 1 Closing
- 4:15 p.m. Adjourn
- 5:40 p.m. Reconvene in the lobby for shuttle transportation to dinner.
- 6:00 p.m. Dinner at Del Frisco's Grille  
*\*Dinner will be held on the rooftop patio; heaters will be available but please plan accordingly for the cooler evening weather.*

## Friday, January 12

- 8:00 a.m. Breakfast
- 8:30 a.m. Day 2 Welcome
- 8:45 a.m. **Roundtable Discussions**  
*Making Dollars and Sense out of NIL*  
*Principles of Principal Giving*  
*The Future of Campaigns*  
*There's GOLD out there! Engaging Young Alumni*
- 9:45 a.m. Break
- 10:00 a.m. **Reimagining Talent and Organizational Structures**  
*Heather Cordell, Biola University*  
*Matthew Eynon, Massachusetts Institute of Technology*  
*Nancy Jackson, The University of Kansas Endowment*  
*Jeff Hilperts, BWF*
- 11:00 a.m. Wrap-Up and Thank-You
- 11:45 a.m. Adjourn

# Guest Speakers



**Heather Cordell**

*Biola University*

Heather Cordell is the Vice President for Advancement at Biola University. She has served at the University since 2016. Heather is currently leading the Advancement team in the \$200 million Campaign, Bold Faith Bright Future. Under Heather's leadership, the University recently received the largest gift in the University's history to establish the Snyder School of Cinema and Media Arts. Heather has a strong background in Gift Planning and Major Gift cultivation and enjoys coaching and developing a growing Advancement team.



**Mo Cotton Kelly**

*The UConn Foundation, Inc.*

"Mo," as she is called by family, friends, and colleagues is the Chief Operating Officer and Senior Vice president for Stakeholder Engagement. (COO-SVP), with responsibility for driving operational and comprehensive campaign strategy, overseeing key administrative functions, and guiding a culture of inclusivity for the UConn Foundation. Mo oversees the departments of alumni relations, marketing and communications, annual giving, stewardship, and board engagement. Mo has more than 27 years of experience with higher education institutions in the university advancement field where she has developed exemplary leadership, created strategic plans, cultivated organizational change, and is known nationally as a leader in the industry.



**Matthey Eynon**

***Massachusetts Institute of Technology***

Matthew Eynon is associate vice president and chief operating officer for the Office of Resource Development (RD) at MIT and brings thirty years of advancement experience to his role. As deputy to the VP, Eynon is responsible for enhancing internal organizational processes, leading and managing day-to-day operations, and building capacity for MIT's future campaigns. As an advancement leader Eynon believes in an integrated, team-first approach to advancement that drives innovative thinking and high performance. Eynon has been a campus CAO, worked on multiple comprehensive campaigns, and served on extraordinary teams with colleagues who have raised more than \$2 billion for education. A graduate of Dickinson College, Eynon has served CASE as a member of the Board of Trustees; chair of the Commission on Philanthropy; and as a co-chair of CASE's Reporting Standards Working Group.



**Colleen Garland**

***Kenyon College***

Colleen Garland leads the Advancement team for Kenyon College where she provides strategic direction of the \$500 million Our Path Forward to the Bicentennial campaign – now in its final year. With more than 30 years of experience in higher education, Garland has a track record of leading teams to new levels of excellence. She was the chief architect of Ohio Wesleyan University's successful \$227 million campaign as vice president; she led the development teams for 13 colleges and units at The Ohio State University as assistant vice president; and she cut her teeth as a gift officer at Denison University.



**Rod Grabowski**

***University of Central Florida Foundation, Inc.***

Rod Grabowski is UCF's Senior Vice President for Advancement and Partnerships and CEO of the UCF Foundation, Inc. A passionate advocate for higher education and its power to transform lives, he oversees the university's fundraising, alumni relations, partnership, communications and marketing efforts. Under his leadership, the Division of Advancement and Strategic Partnerships builds meaningful, fruitful connections that enhance UCF's impact and result in new sources of revenue to fuel our excellence and unleash the potential of our students, faculty, and community.



**Nancy Jackson**

***The University of Kansas Endowment***

Nancy Jackson is Senior Vice President and Chief Development Officer for KU Endowment. Previously, she co-founded Generous Change, which provides workshops and toolkits for university fundraisers, academic leaders, and trustees around the country. Before that, she served as Assistant Vice President for Strategic Development at KU Endowment, Team Lead for the College of Liberal Arts and Sciences, and Development Director for the Spencer Museum of Art after ten years as an acquiring editor at the University Press of Kansas. Jackson also founded an award-winning nonprofit which continues to thrive today.





**Jackie Lewis**

***University of Missouri-Columbia***

Jackie Lewis is the MU Vice Chancellor for Advancement and joined the University of Missouri in August 2020. In this role, Jackie strengthens and cultivates the key partnerships that support the university's philanthropic goals and alumni relations, as well as collaborating with leaders across campus to build upon the university's ongoing fundraising efforts. She leads a team of about 180 dedicated advancement professionals committed to Mizzou's land-grant mission.



**Karl Miller-Lugo**

***University of Texas at San Antonio***

Karl Miller-Lugo is vice president for advancement and alumni engagement at the University of Texas at San Antonio, where he oversees UTSA's philanthropic enterprise, which includes principal/major gifts, development, annual giving, planned giving, donor relations, athletics resource management, and operations and talent management. He also leads the university's Office of Alumni Relations, which is responsible for building affinity with the university's 131,000 living alumni. Miller-Lugo is a CASE Laureate and recipient of the Crystal Apple Award for Teaching Excellence.



**Joel Stephens, CLU®**

*Thomas Financial*

Joel Stephens, a Principal and President of the Life Insurance Division at Thomas Financial since 1994, specializes in life insurance planning for business owners and executives. A distinguished professional, he focuses on Estate Planning for High-Net-Worth Individuals, Business Continuity, and Executive Benefits. Joel holds the Chartered Life Underwriter (CLU) designation from The American College. A Past President of the Tampa Bay Estate Planning Council, he actively participates in industry associations and currently serves on the Board of Directors and Executive Committee for the Hillsborough Education Foundation, chairing the Planned Giving Committee. His involvement extends to the Straz Center for the Performing Arts and the American Red Cross. Joel is Chairman Emeritus of the Board for The Tampa Connection and received the Citizen of the Year award in 2016. A graduate of the Florida Institute of Technology, he remains engaged with his alma mater, serving on the Athletic Alumni Board, and participating in Florida Tech's Galaxy and Ad Astra Societies.

# BWF Team



**Josh Birkholz**, chief executive officer and co-owner of BWF, is a leader in big philanthropy and innovator for the business of fundraising. In his 18 years of consulting the leading nonprofits, universities, and healthcare centers around the world, Josh has redefined how we look at modern program design, fundraising in a smart economy, and branding in the high-net-worth marketplace. Josh is widely regarded as a trailblazer of 21st-century development strategies, having authored the sought-after book, “Fundraising Analytics: Using Data to Guide Strategy” and contributing to the books “A Kaleidoscope of Prospect Development and Return on Character,” and most recently, “BeneFactors: Why Some Fundraising Professional Always Succeed.”



**Katrina Klaproth** is chief operating officer and co-owner at BWF specializing in fundraising operations and systems. She is a recognized expert in donor management systems, organizational structures, integrated and direct fundraising, and donor relations. Katrina previously served as the director of development operations for the George W. Bush Presidential Center, where she oversaw data management and reporting, prospect development, gift processing, membership services, and communications. Throughout her over 20-year career, she has also held leadership roles such as director of development management systems for Methodist University in Dallas, Texas, and vice president of development and marketing at Bon Secours Health System in Port Charlotte, Florida.



**Mark Marshall** is chief strategy officer and co-owner at BWF. With 30+ years of fundraising experience, he brings a strong background in major and planned gifts, alumni relations, annual giving, and campaign strategy to clients. He has a particular interest in strengthening development teams through coaching of leadership. Prior to joining the firm, he served for over 10 years at the University of Minnesota's Medical Foundation as director of development for special programs and as director of alumni relations and special projects. During that time, he was part of the university's \$1.5B campaign.



**Jason Boley** is executive vice president, operations and technology at BWF. Jason specializes in technology, data management, reporting, and business process definition. Jason brings a unique blend of fundraising expertise and information technology skills developed over two decades of working with private colleges, public research institutions, healthcare foundations, and libraries. Jason is a recognized leader in all aspects of development operations and is active in several professional organizations where he speaks frequently at the local and national levels.



**Bob Guittard** is executive vice president, engagement and donor experience at BWF where he leads the division, helping clients articulate and achieve their vision for long-lasting growth of impact and donors. Previously, Bob served as assistant vice president of donor engagement for the University of Texas at Austin overseeing campus-wide partnerships, strategic growth, and integration of multiple development divisions as well as chief strategy officer at Dunham+Company for over fifteen years. Bob believes we need dreamers, willing to think differently, in order to connect with people's hearts, unlocking a generosity that is not only good for others, but also good for them, too.



**Jeffrey Hilperts** is executive vice president, campaigns and fundraising strategy at BWF where his clients include colleges and universities, independent schools, and major nonprofits. His work focuses on campaign readiness, feasibility studies, campaign planning, increasing meaningful volunteer engagement, and campaign communications. Jeff previously served The Ohio State University for nearly 15 years in numerous leadership roles, most notably as the campaign director for the *But for Ohio State* campaign. In that role, Jeff orchestrated campaign planning and volunteer engagement for the \$3.1B campaign, the largest in Ohio State's history. Also, while at Ohio State, Jeff served as the chief advancement officer for the Michael E. Moritz College of Law, leading the college to consecutive record-breaking fundraising years.



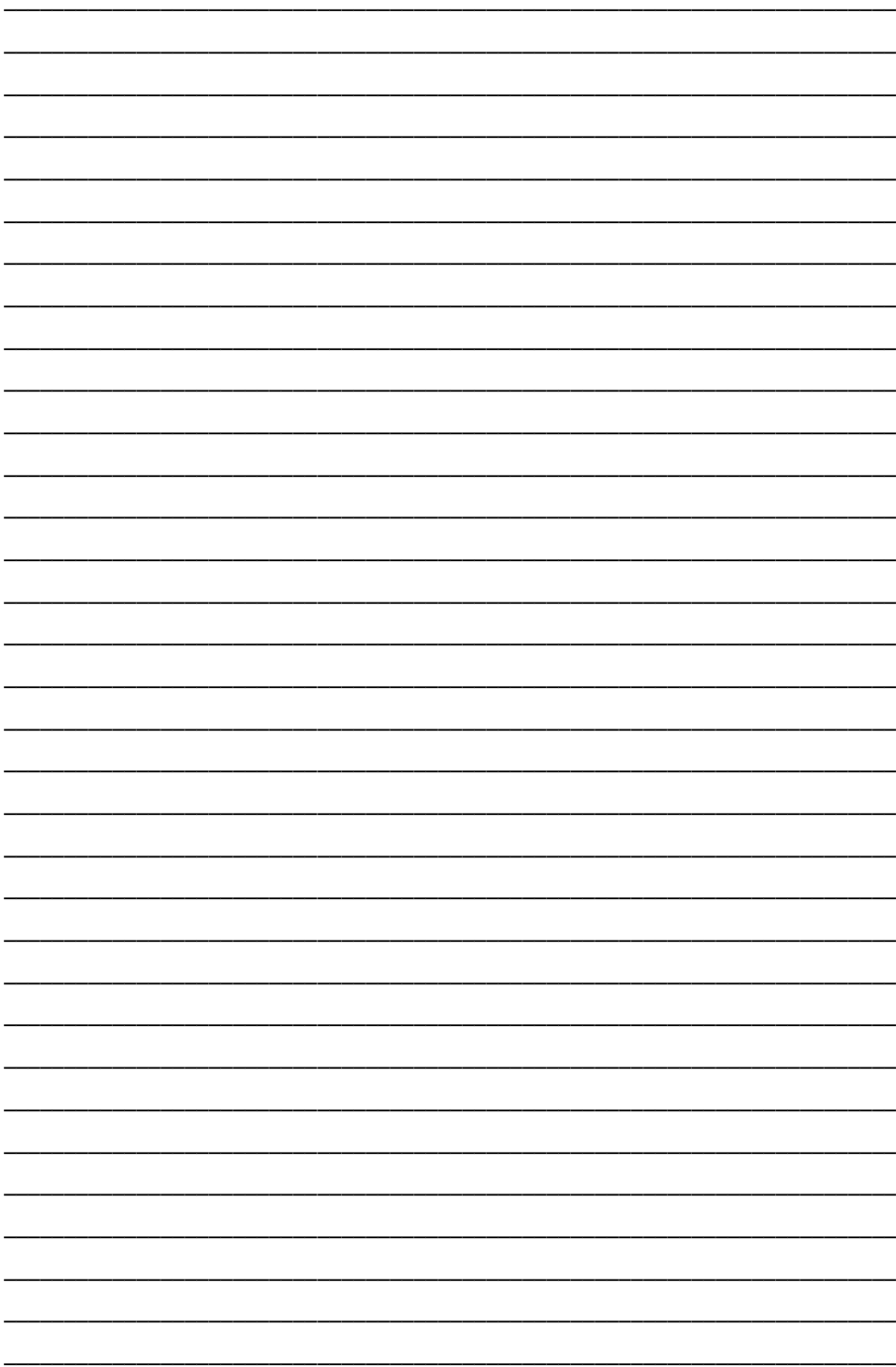
**Emily Christaldi** is a marketing and business development coordinator at BWF. Emily applies her fervent work ethic and project management capabilities in support of the sales and marketing team's initiatives and operations. Key responsibilities include proposal development, sales support, internal communication, and providing overall marketing strategy support.



**Lauren Cummings** is the dedicated event specialist at BWF where she oversees the management and coordination of a wide array of events. From BWF-hosted conferences and webinars to overseeing association trade shows, conferences, and sponsorships, Lauren ensures every detail is thoughtfully executed, resulting in impactful and seamlessly streamlined events.

















***Empowering  
nonprofits to  
achieve impact  
and imagine new  
possibilities***

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