



PROFESSIONAL FACE TO FACE
FUNDRAISING ASSOCIATION

PFFA SUMMER WORK GROUP 2024

July 18, 2024 | Doctors Without Borders / MSF 40 Rector St, 16th Floor, New York, NY 10006

[Sponsors](#) | [Agenda](#) | [Speakers & Hosts bios](#)

PFFA Work Groups are exclusive events for PFFA members and invited guests. These triannual conferences are brought to you by the PFFA, our planning committee members, our sponsors and the board of directors. These conferences provide an opportunity to discuss, debate, share, and take away ideas, best practices, and relationships from/with the most talented and experienced face-to-face fundraisers, managers, consultants, and supporting organizations in the U.S. and beyond.

Thank you for joining us.

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WORK GROUP AGENDA

PLANNING COMMITTEE:

- Hoag Holmgren, Executive Director, PFFA
- Sherry Bell, President, Founder & CEO, Grow Fundraising & Consulting Inc
- Seth Merritt, Vice President, DonorVoice
- Rachel Feldman, Director, Sustainer Strategy, Humane Society of the United States
- Michael Scully, Co-Founder, BriteVox
- Vincenzo Spagnola, Member Services Associate, PFFA

ADMINISTRATION & SUPPORT: Hoag & Vince

EMCEE: Michael Scully, BriteVox

8:30 – 9:00 Breakfast

Brooklyn Bagel (coffee, bagels with assorted toppings)

9:00 – 9:10 Welcome and Sponsor Acknowledgment

9:10 – 10:10 **2024 PFFA Stewardship and Retention Survey Update**

Deborah Kalu, Founder & CEO, Kalu Consulting

Kelly England, Founder & CEO, Multiply Strategies

Sherry Bell, Founder & CEO, Grow Fundraising

Erica Waasdorp, President, A Direct Solution

10:10 – 11:40 Discussion / Q&A

10:40 – 11:00 Break

11:00 – 12:00 **How Decision Science Can Power Your Fundraising**

Thomas Kurmann, Vice President of Resource Development, Oxfam America



12:00 – 1:00 Lunch

Tacos from Tacombi (**crispy fish**, Pollo Yucateco, sweet potato, guacamole, assorted sides and toppings)

1:00 – 1:30 **“Hey, Where Did That Nice Fundraiser Go” – A Year in Review**

Juanita Poalillo, Senior Retention and Engagement Manager, Oxfam America

Ali Jones, Ass. Dir. of Sustainer Acquisition & Marketing Strategy, Oxfam America

1:30 – 1:45 Discussion / Q&A

1:45 – 2:15 **Quantifying Training Efficiency**

Michael Scully, Co-Founder, BriteVox

2:15 – 2:30 Break

2:30 – 3:30 **Interactive Insight: Successes and Failures in Quality Assurance with
Mystery Shopping, Surveys, and Calls**

Seth Merrit, Vice President, DonorVoice

3:30 – 4:00 **Hello <Insert Name> Matters, Reinventing Your Welcome Series to Increase
Conversions**

Maan Sacdalon, Director of Digital Production and Database Management, National
Trust for Historic Preservation

4:00 – 4:10 Break

4:10 – 4:55 **Resolving Declined Payments with Conversational Messaging**

Luke Bridges. Head of Strategy & Growth, Kudosity



Paul Twomey, General Manager, Peak Fundraising Systems

Rachel McConaghie, Head of Individual Giving, Save the Children AU

4:55 – 5:00 Closing Remarks

5:30 – 7:30 Happy Hour & Networking

Treadwell Park Downtown, 301 South End Avenue
(www.treadwellpark.com/location/downtown/)

SPEAKERS AND HOSTS

Sherry Bell, Founder & CEO, Grow Fundraising & Consulting Inc.

Sherry is the Founder and Chief Executive Officer of Grow Fundraising & Consulting, Inc., where she provides a full suite of consultative products to non-profit and for-profit organizations.

Sherry has more than 25 years of experience in the acquisition space for both nonprofits and for-profit businesses with 20 years dedicated to fundraising strategy, acquisition, retention, and reactivation. Sherry is an adaptable thought leader in all things F2F and sustainer acquisition, retention, operations, strategy, and regulatory compliance.

As the initial founding member of the PFFA, Sherry served as the President of the Board of Directors of the Professional Face-to-Face Fundraising Association and has been an active participant in efforts to increase ethical practice, sustainability, and effectiveness within the face-to-face fundraising channel from 2014 to present.

With significant experience in sales and team building from 1998 to 2004, Sherry was able to make the transition into the nonprofit sector in 2004. Since then, Sherry has worked as the direct lead for more than 20 national and international organizations, as well as for smaller organizations that have historically been unable to participate in more investment-heavy forms of sustainer acquisition. She allows clients to



leverage her multi-faceted experience so they can not only reach revenue targets but do so with the most sustainable, ethical, and effective practices in place to protect their brand and present future forward.

Luke Bridges, Head of Strategy & Growth, Kudosity

Luke is an energetic leader with a passion for technology, innovation and doing business for good. Driven by the belief that interacting with any organisation should be as simple and convenient as chatting with a friend, Luke launched the conversational messaging company, Kudosity in 2016.

With over a decade of experience in the space, and having picked up several awards along the way, Luke helps not-for-profits implement conversational messaging programs designed to lift supporter engagement and improve fundraising results across a variety of initiatives – including peer to peer events, appeals, regular giver acquisition and retention programs.

Kelly England, Founder & CEO, Multiply Strategies

Kelly England, CEO/Founder of Multiply Strategies, has had the privilege to work with more than sixty national nonprofits and partnered with more than thirty agencies throughout her career. Kelly brings expertise across multiple fundraising channels, sustainer optimization, investment and strategy analytics, and vendor management to her partnerships. The team of consultants Kelly leads at Multiply Strategies support some of the largest and fastest growing nonprofit organizations via Strategic optimization of sustainer, mid-level, & mass audience segments; Channel launch and management for F2F canvassing & telemarketing; and multi-year strategic planning & case building. With a unique combination of diplomacy, project management expertise, and analytics/fundraising acumen, Kelly and Multiply Strategies help organizations manage change effectively, break down silos, and drive rapid growth.

Ali Jones, Associate Director of Sustainer Acquisition and Marketing Strategy, Oxfam America



Ali previously worked as Business Development & Branch Manager for recruitment agencies within the Health & Social Care sector. During her time in this role, she witnessed the great work charities were doing and felt inspired to work more directly in the non-profit space. Starting from the ground up, she switched careers in 2010 and began her journey as an in-house street fundraiser and Team Leader for Shelter UK, Manchester. With her sales background, she quickly became a F2F Manager and set up Shelter Scotland's first in-house F2F operation. As the operation diversified, she became Direct Dialogue Operational Manager, responsible for SMS lead generation, Street, D2D and Mall fundraising operations for Scotland.

In 2014, Oxfam America gave Ali the opportunity to work as a F2F Specialist, where she devised a plan to help improve long term sustainer growth. A year later, she built their first in-house F2F program, operating in several states and became National F2F Fundraising Manager. During her time at Oxfam so far, she has also worked as F2F Global Specialist with Oxfam International on secondment, sharing her knowledge to help other affiliates with training, performance management and strategy. In her ever-evolving career at Oxfam America, she is currently Associate Director of Sustainer Acquisition and Marketing Strategy, responsible for the sustainer audience across all channels. With a heavy focus on retention and testing new innovations, she is passionate about enriching the donor experience, building holistic ways of working and learning what can be achieved through a behavioral economics lens.

Deborah Kalu, Director, Founder & CEO, Kalu Consulting

Debs Kalu is the Founder of Kalu Consulting, an International F2F Fundraising Consultancy based in London, UK.

Due to her extensive global F2F experience working with both F2F agencies and non-profits that now spans 22 years, Debs has direct experience of not only managing and building best practice in existing F2F campaigns, but of launching efficient F2F operational processes from the onset in multiple countries including the UK, Ireland, Netherlands, Spain, Italy, Germany, Poland, Sweden, Italy, Brazil, USA, and Canada.

Over the last five years as a consultant Debs has provided F2F project management, expert advice, and support to her clients on;



- F2F market entry/agency tenders/onboarding and set up
- F2F campaign reviews (growing campaigns & maximizing ROI)
- F2F compliance audits (agency contracts/clawbacks/due diligence)
- F2F operations & process audits (accurate retention/attrition reporting)
- F2F proposition & welcome journey (sustainer retention)
- F2F Campaign mentoring & management (expert advice)

Debs is a dynamic, innovative and passionate fundraiser who thrives on growing F2F campaigns from conception through to the acquisition of tens, if not hundreds of thousands of new long-term loyal sustainers for multiple non-profits.

For more information please contact: debs@kaluconsulting.com.

Thomas Kurmann, Vice President Resource Development, Oxfam America

Thomas Kurmann is a Strategic Philanthropy professional with more than 20 years of experience. Living in New York City with his spouse Susana and 13-year old daughter Carlota, he is currently the Vice President of Oxfam America's Resource Development division, which aims to grow revenue and supporters in the competitive and disrupted landscape of US philanthropy.

Prior to Oxfam America, he was leading the fundraising efforts for Médecins Sans Frontières/Doctors Without Borders (MSF) in the US, Germany, and Switzerland over a period of 16 years. He was also supervising the fundraising operations in Mexico. Before MSF, Thomas was the Communications Director at Terre des hommes, a children's aid foundation.

Throughout his career, he has contributed to raising close to \$3 billion.

Thomas is teaching fundraising at academic institutions in Switzerland and is a speaker at fundraising conferences in the US and overseas on topics such as strategy and donor journey mapping, creation of business canvas and value proposition models, design thinking, innovation and behavioral economics.

Prior to his Fundraising career, Thomas worked as a freelance journalist, public relations professional, and as a dramaturg for a small theatre.



Seth Merritt, Vice President of Product Strategy, DonorVoice

Seth Merritt is a nonprofit fundraising and advocacy generalist with over 20 years' experience deploying technology for social good. Seth helps causes to raise money, mobilize supporters, influence public policy, communicate and implement programs. His work has included product management, digital marketing, fundraising, strategic consulting, grassroots organizing, project management, customer success, and CRM/SaaS technology implementation. Along the way he has worked with national and local nonprofits, trade associations, public media, advocacy groups, political campaigns, technology startups, religious organizations, and Fortune 100 corporations.

Juanita Poalillo, Senior Retention and Engagement Manager, Oxfam America

Juanita is a seasoned Senior Retention and Engagement Manager with over eight years in the non-profit sector and more than a decade in sales. As a driven fundraising professional, she has a passion for inspiring new donors to connect with the organization's mission while enhancing retention rates for current supporters. Juanita has also led successful Face-to-Face and Tele-Fundraising teams, and one of her favorite things about the fundraising world is the amazing people she gets to work with and the boundless creativity it takes to connect and inspire the public. When she's not working, you can find Juanita in the kitchen baking with her two daughters or hiking with her faithful companion, Roxy.

Maan Sacdalan, Director of Digital Production and Database Management, National Trust for Historic Preservation

Maan is the co-founder of Stratovation and Arbcentrix, and works at the National Trust for Historic Preservation as the Director of Digital Production and Database Management, and the product owner of Engaging Networks. She collaborates closely with the Development and Marketing teams. With over 15 years of experience in the nonprofit sector, Maan's background is in front-end web design, with a focus on strategy and fundraising. She has extensive experience designing tailored solutions for nonprofits and social impact organizations at the intersection of technology and people.



Michael Scully, CEO, BriteVox and Founder, Zenterprize

Michael is the CEO of Zenterprize and Founder of BriteVox. Originally from the UK, Michael began building fundraising teams almost 25 years ago, in the earliest days of F2F. Having worked extensively in the UK, Germany, and the US and with first-hand experience in many other countries, he has witnessed the evolution of F2F from a little-known channel to the powerhouse it is today across different cultures.

Anyone who works closely with Michael will know that one of his favorite expressions is, 'what gets measured, gets accomplished.' He is a great believer in using data to understand how to be a more effective fundraiser and, beyond that, to glean the insights that signal the direction of the industry. Above all, Michael is an innovator and is constantly looking for ways to expand the pie for all and to reach a wider audience working on the principle that it is better to get started and let the work teach you than to wait for perfection.

Michael has been involved with the PFFA since 2018 and was elected to the PFFA Board of Directors in 2022. He hopes to share his international experience, enthusiasm, and understanding of the issues all stakeholders in the industry face.

Paul Twomey, General Manager, Peak Fundraising Systems

Paul has a passion for technology, innovation, and bringing out the best in people. As General Manager of Peak Fundraising Systems, he drives a culture of constant improvement and 10/10 customer service through teamwork, superior systems, and innovative solutions.

With more than 13 years of fundraising experience across a variety of channels including Face to Face and Telefundraising, Paul develops software solutions and works to build systems that help not-for-profits and agencies alike generate a real net return on their programs.

Erica Waasdorp, President, A Direct Solution



Erica Waasdorp is President of A Direct Solution, located on Cape Cod, Massachusetts. Erica lives and breathes direct response and fundraising and can be considered a Philanthropyholic.

She works with non-profit clients all over the country as well as internationally, helping them with their appeals and monthly giving. She is also the former US Ambassador for the International Fundraising Congress (IFC), www.resource-alliance.org

Erica Waasdorp published two books on monthly giving. Her first Monthly Giving. The Sleeping Giant, published in 2012 and Monthly Giving Made Easy, a How-To Guide, published in May of 2021. She created the Monthly Donor Road Map and several e-books to include the Monthly Donor Retention Play Book and many other resources. Erica is an AFP Master Trainer, and she regularly blogs and presents in person or virtually on appeals, direct mail, and monthly giving. For more information, contact Erica at erica@adirectsolution.com or see www.adirectsolution.com

