



# PROFESSIONAL FACE TO FACE FUNDRAISING ASSOCIATION

## PFFA SPRING WORK GROUP 2024

**MARCH 19, 2024 | National Audubon Society, 1828 L St NW, Washington DC 20036**

**Sponsors | Agenda | Speakers & Hosts bios**

**Welcome members and guests!** The PFFA Spring Work Group is AI – oh my! Whether you use AI a little in your daily fundraising duties or a lot, we aim to bring you information on what it is, its practical application in fundraising, and how best to use it and examples of how it is being used. Additionally, we have an excellent session about empowering fundraisers to use their soft skills to win and keep effective and lasting relationships with donors. And if you are not yet “in”, we will facilitate a brainstorming session around the ATMS and the growing needs of our members and the public.

PFFA Work Groups are exclusive events for PFFA members and invited guests. These tri-annual conferences are brought to you by the PFFA, our planning committee members, and our 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.

## PFFA SUMMER WORK GROUP SPONSORS

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# WORK GROUP AGENDA

## PLANNING COMMITTEE:

- Hoag Holmgren, Executive Director, PFFA
- Sherry Bell, President, Founder & CEO, Grow Fundraising & Consulting Inc
- Nicole Clemente, Save the Children US
- Giovana Brayman, Ascenta Group
- Jamal Monteilh, One Voice Fundraising

## ADMINISTRATION & SUPPORT: Hoag & Sherry

## EMCEE: SARAH FLIS, ASCENTA GROUP

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- 8:30 - 9:00 Breakfast  
Apple Spice - bagels, peanut butter, cream cheese, hard-boiled eggs, coffee and hot tea.
- 9:00 - 9:05 Welcome and Sponsor Acknowledgment – Hoag Holmgren, PFFA
- 9:05 – 9:30 Introduction and Housekeeping - Sarah Flis, Ascenta Group
- 9:30 – 10:15 Hoag Holmgren, Executive Director, PFFA  
Sherry Bell, Consultant PFFA

### ***PFFA Annual Meeting: 2023 Progress Report and 2024 Look Ahead***

The PFFA holds an Annual Members meeting at which the PFFA presents an update on the previous year and the plan for the year ahead. This is the time to ask questions, share concerns, or suggest ideas.

- 10:15 – 11:00 Eric Landy, Co-Founder & COO, Made Media  
Sherry Bell, Consultant, PFFA

### ***PFFA ATMS, Circa 2030***

The ATMS is and always has been a work in progress. The first part of this session will be a share of recent updates and additions to the ATSM to make the user experience more effective and practical.



The second part of this session will be a facilitated discussion of the ATMS future. What do we need to continue to improve the software? What are the top three improvements that would be game-changers? Share your thoughts on the desired ATMS experience in 5 years.

11:00 – 11:30 Morning break

11:30 - 12:15 Nabila Tisha, CFRE - SVP, Sales & Operations, Globalfaces  
Amy Korosi - SVP, Data & Technology, Globalfaces

### ***Understanding How AI and Data Can Transform Your Donor Experience***

Globalfaces will take you through how Level AI transformed their call center, helping to increase efficiencies and fundraising. Globalfaces (GF) manages over 22,000 calls a month, and with Level AI it allows GF to ensure consistent brand impressions for charities, and a quality experience for donors. Amy and Nabila will walk you through this transformation, and then show you how your data can guide your organization to provide the best donor experience. The future for AI data at Globalfaces is just around the corner and we'll wrap up our talk with a glimpse into that future!

### **12:15 - 1:30 Lunch**

Apple Spice – Kebab and Taco bar with vegetarian, vegan and gluten free options.

1:30 – 2:45 Ettore “Et” Rossetti, Head Advisor, Technology/Marketing/Innovation Partnerships

### ***A Practical Conversation on What AI Is and How Nonprofits Can Use AI to Augment Fundraising***

The advent of AI has been called the next big technological revolution for humanity as transformative as the invention of fire, the printing press and the Internet. In this interactive session, you will gain a common understanding of AI, the ethical and practical considerations facing nonprofits and how Generative AI tools can be used to do our jobs faster and better. Our guest speaker is Ettore Rossetti of Save the Children, an early adopter, pioneer and practitioner of AI and emerging technologies.

2:45 – 3:00 The F2F Workforce Landscape

3:00 – 3:15 BREAK



3:15 – 4:30 Rachel Feldman, Director, Sustainer Strategy, Humane Society of the United States

***Winning Supporters and Influencing Donors***

Recent trends in nonprofit marketing include declining donor numbers and retention rates, indicating that there is a failure to build meaningful relationships and properly communicate the impact of a donor's gift. Communicating with our donors and demonstrating our organization's impact has become more important than ever in our current digital climate where consumers hold more control over the narrative than ever before. Creating human relationships online still requires the soft skills needed for in-person interactions, and Dale Carnegie's classic book, "How to Win Friends and Influence People", provides us with the roadmap from 88 years ago! Learn how to engage with your supporters, make a lasting impression, and how to gain and maintain the trust needed to keep our donors around for years to come!

4:30 – 4:45 Closing remarks

4:45 – 5:00 2024 PFFA Work Group Survey

**5:30 – 8:00 HAPPY HOUR & NETWORKING**

**Dog Haus Biergarten – Dupont**

1837 M Street NW, Washington D.C., 20036



# **SPEAKERS AND HOSTS**

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

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Currently serving as Founder & CEO of Grow Fundraising & Consulting Inc., Sherry is a passionate and proven leader in direct-response nonprofit fundraising with more than 18 years of experience in sustainer acquisition, stewardship, and retention, and 25 years of experience in performance management and organization building. These experiences have included working with nonprofits directly and through agency relationships.

As one of the founders of the Professional Face-to-Face Fundraising Association (PFFA), Sherry is committed to adding a layer of accountability and responsible self-regulation to face-to-face fundraising and has been working to lead the channel through her work with the PFFA since 2014. She currently continues to support the PFFA as their consultant.

**Rachel Feldman**, Director, Sustainer Strategy, Humane Society of the United States

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Rachel has 15+ years of experience in nonprofit fundraising and marketing, including several different roles throughout her tenure with the HSUS, Goodwill Industries International, and other nonprofit organizations. As Director, Sustainer Strategies for the HSUS, Rachel leads the strategic development and implementation of the HSUS sustainer acquisition, retention and cultivation strategies, with the goal of maximizing donor lifetime value. Rachel lives in Frederick, MD with her husband, three dogs (two of which are from HSUS rescues), and three cats.

**Sarah Flis**, Chief Operating Officer, Ascenta

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As the Chief Operating Officer of Ascenta Group since 2010, I've been fortunate to apply over two decades of experience in face-to-face fundraising and direct marketing. My journey began shortly after earning a degree in E-commerce and Marketing in 2003, focusing on database management and design. This path led me to Sydney, Australia, where I started working with the Appco Group, diving deep into the direct marketing realm as General Manager of Operations. Over the course of the next three years I travelled abroad establishing operational hubs in New Zealand and parts of south east Asia.



In my role, I've had the privilege of leading a dedicated team both internationally and domestically across various face-to-face divisions, concentrating on building a reliable infrastructure that could not only scale but also maintain the integrity of data for our operations and, importantly, for our clients. My career, which has spanned across three continents, allowed me the unique opportunity to contribute to establishing 35 new markets for the agency and its partners. My efforts in Marketing, operations, compliance, technology, and training have been part of a collective endeavor to elevate industry standards.

One of the milestones I'm proud of is guiding Ascenta Group to be an early adopter of digital fundraising and now integrating AI technologies initiatives that reflect our commitment to staying at the cutting edge of our field. My approach to work is deeply rooted in the values of ethical fundraising and adherence to sound business practices. It's always been important to me to build and maintain trust with our charity partners, ensuring their investments not only meet but exceed expectations, ultimately supporting the critical work they do.

I believe in a client-centric strategy, inspired by the continuous support and investment by charities. This belief motivates our team to constantly seek innovation and develop effective fundraising strategies that address the evolving needs of our world. It's through teamwork, shared goals, and mutual respect that we've been able to make a difference, and I'm genuinely grateful to be part of this journey.

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**Hoag Holmgren, Executive Director, PFFA**

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Hoag joined the PFFA team to lead the organization as Executive Director in September 2023.

Hoag has extensive experience with organizational development in academic and higher ed nonprofit sectors. Most recently, he was the executive director for the POD Network in Higher Education, the main professional society for educational development in North America, where he oversaw consistent growth in membership and conference attendance. Hoag is known for developing and building resilient team & organizational cultures of inclusion, collaboration, innovation, fun, and deliverables. His experience also includes project management and event building. An experienced educator, he's given many workshops and trainings on the power of meditation in supporting creativity, resilience, and collaboration.



He lives with his family in the mountains west of Boulder, CO and is an avid hiker, cross-country skier, part-time Zen teacher, and, if there's any time left, writer (*No Better Place: a New Zen Primer*).

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**Amy Korosi, SVP, Data & Technology, Globalfaces**

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Amy is heading up our IT and Data Strategy, and oversees our day-to-day Data Platform Management. Amy is a dynamic and results-driven Data professional with over 20 years of experience. She joins us from HBC where she implemented unit economics and delivered a number of large data technology migrations. She possesses a deep understanding of leveraging data analytics to derive actionable insights having worked for companies such as Rogers & CIBC.

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**Eric Landy, Founder & Chief Operating Officer, Made Media**

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Eric is a technologist and entrepreneur at heart. In 2009, he started Made Media, an ecosystem of innovators, designers, software engineers and developers devoted to accelerating business results through user-friendly technology. Made Media is the creator of OnBoard, the leading acquisition and field-force automation tool designed specifically for the face-to-face channel.

Eric currently serves as president of Made Media. He oversees business and product development, sales and marketing efforts as well as implementing the product vision for OnBoard. Eric also oversees special custom software projects including the new Territory Management System for the Professional Face to Face Fundraising Association of the United States (PFFA).

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**Ettore Rossetti, Head Advisor, Technology/Marketing/Innovation Partnerships**

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As a change agent and a catalyst for innovation for more than 19 years, Ettore pioneered innovations at Save the Children including starting its digital marketing practice, social media presence, influencer marketing, crypto philanthropy and AI adoption. He co-founded Save the Children's Stream Team, a community of gamers, vloggers and content creators and led Save the Children to be the world's first international non-governmental organization (INGO) to accept a bitcoin donation in 2013.

In 2015, Ettore was awarded the American Marketing Association (AMA) Nonprofit Marketer of the Year for his innovative marketing initiatives. In 2013 and 2020, he shared a Webby Award nomination for his contributions to the charity-gaming and





globalizing a social campaign. He is a sought after thought leader and public speaker and has been quoted in *Bloomberg Business*, *The Chronicle of Philanthropy*, *The New York Times*, *The Wall Street Journal* and the *USA Today*. On a personal note, Ettore is a three-time Guinness World Records® title holder with his identical twin brother, Angelo. The longest tennis rally, the longest tennis volley and the longest pickleball rally, all achieved to benefit Save the Children and other causes they care about.

**Nabila Tisha, CFRE, SVP, Sales & Operations, Globalfaces**

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Nabila brings over a decade of revenue-driving experience in the nonprofit space having overseen multi-million-dollar fund development portfolios during her time at ME to WE and at Salesforce.org. At Globalfaces, Nabila guides all contact with donors for telephonic solicitation, verification and stewardship leading a multidisciplinary team of over 120 employees and leading operations within the Contact Center. She is a passionate animal advocate and currently serves as a Board Director at Toronto Wildlife Center and as the Vice President of the Board at Toronto Humane Society.

