

VIRTUAL CONFERENCE · MAY 5-6, 2026

The Future of *Fund Management*

A two-day virtual event bringing together fund management and stewardship leaders, innovators, and changemakers to explore the latest trends, challenges, and strategies in fund management and stewardship.

DATE

5-6

May 2026

- Two-day virtual conference
- 12PM-5 PM Eastern Time
- Industry leaders & changemakers

[Register Today](#)

[Learn more](#) →

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Day One - *Tuesday, May 5th*

12:00 PM – 1:00 PM ET

Opening Remarks and Welcome

Chelsea Lamego • FundMiner

Keynote Address

Josh Birkholz • BWF

1:00 PM – 2:00 PM ET - Breakouts

Inside the Data: Highlights from the 2026 Benchmarking Survey

Haider Ali • FundMiner

2:00 PM – 2:45 PM ET - Breakouts

Industry Perspectives on Fund Management & Stewardship

Dr. Fleming Puckett • CASE

Finance & Fundraising: Strategic Funds Management through Innovation, Collaboration & Automation

Laura Humberger • Huron Consulting Group | Chelsea Lamego • FundMiner

Connecting Donors with Impact

Kellie Burns-Franco • Paso del Norte Community Foundation

2:45 PM – 3:00 PM ET - Break

3:00 PM – 4:00 PM ET - Breakouts

Tackling Unspent Funds

Adriana Valdez • University Hospitals | Alex Oftellie • BWF

Connected Systems, Better Outcomes

Wendy Gamba • Community Foundation of Greater New Haven | Alejandro Stevenson-Duran • FundMiner

Demystifying Fund Management for Strategic Partners

Aaron Rouse • University of Nebraska Foundation

4:00 PM – 5:00 PM ET

Building Communities of Impact

Alejandro Stevenson-Duran • FundMiner | Chelsea Lamego • FundMiner | Lasserina Dowell • FundMiner

Day One Closing

Original Score Feat. Brad Real

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Day Two - *Wednesday, May 6th*

12:00 PM – 1:00 PM ET

Opening Remarks: The State of AI in Fundraising

Sudip Datta • Blackbaud

Keynote: Why Stewardship is Our Best Fundraising Engine

Erik Daubert • Industry Expert & Speaker

1:00 PM – 2:00 PM ET - Breakouts

Finance & Fundraising: It's a Partnership

Matt Cotty & Nicole McDonald • Wisconsin Foundation and Alumni Association

Data Governance for Fund Management

Pamela Mitchell • Consultant & Operations Expert

Operating Inside Complex Systems

Meghan Metzger • Maine Health & Jan Wood • BWF

2:00 PM – 2:45 PM ET - Breakouts

From Signature to Revision: Gift Agreement Amendments

Sarah Thomas • North Carolina State University

The Fund Management Maturity Model: A Framework for Growth

Haider Ali • FundMiner

You Found Unspent Funds — Now What?

Shannon Knapp • Dartmouth College

2:45 PM – 3:00 PM ET - Break

3:00 PM – 4:00 PM ET - Breakouts

From Idea to Implementation: Lessons from the Field

Derek Pinnik • North Dakota State University & Aimee Furrie • FundMiner

Modern Fund Stewardship in Healthcare Philanthropy

Tiffany Polk • UTHHealth Houston and Kindsight

Beyond Implementation: Organizational Readiness for Fund Stewardship Technology

Carrie White • Zuri Group | Arielle Johnson • University of Houston System

4:00 PM – 5:00 PM ET

Fund Management is Funny

Lynne Wester • Donor Relations Group