

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

Jenny Cooke Smith • CASE | Dr. Fleming Puckett • CASE

### Managing Successful Software Implementations

Laura Humberger • Huron Consulting Group | TBA

### Connecting Donors with Impact

Mica Short • Paso del Norte Community Foundation

2:45 PM – 3:00 PM ET - Break

3:00 PM – 4:00 PM ET - Breakouts

### Tackling Unspent Funds

Victoria Newman • University Hospitals | Alex Oftelie • 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

### 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 and BWF

2:00 PM – 2:45 PM ET - Breakouts

### From Signature to Revision: Gift Agreement Amendments

Sarah Thomas • North Carolina State

### A Case Study in Technology Partnerships

Stephan Enke • FundMiner | TBA

### 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

### Connected Systems Case Study

Aimee Furrie (FundMiner) & TBA

### Modern Fund Stewardship in Healthcare Philanthropy

Tiffany Polk • UTHHealth Houston and Kindsight

### Planning for Effective CRM Transitions

TBA

4:00 PM – 5:00 PM ET

### Fund Management is Funny

Lynne Wester • Donor Relations Group

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## About *the conference*

The Future of Fund Management (#FOFM26) is a two-day virtual conference dedicated exclusively to the operational, financial, governance, and technological future of philanthropic fund management.

Now in its second year, #FOFM26 convenes leaders from higher education, healthcare philanthropy, and community foundations to address the increasing complexity of fund oversight, donor intent protection, data governance, and institutional accountability.

This is where fundraising, finance, compliance, and technology meet.

## 2026 *conference focus areas*

- Protecting donor intent in evolving regulatory environments
- Preventing fund commingling & financial misalignment
- Governance best practices
- AI & technology in fund stewardship
- Organizational readiness for system modernization
- Gift agreement lifecycle management
- Cross-functional collaboration between finance & advancement

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# Conference *Audience*

## ATTENDEES INCLUDE:

- Chief Development Officers
- Executive Directors
- CFOs & Controllers
- Donor Relations and Stewardship Teams
- Fund Managers
- Advancement Services Leaders
- Foundation Finance Teams
- Data Governance Professionals
- Gift Compliance Teams

## INDUSTRIES REPRESENTED:

- Higher Education
- Healthcare Philanthropy
- Foundations & Nonprofits