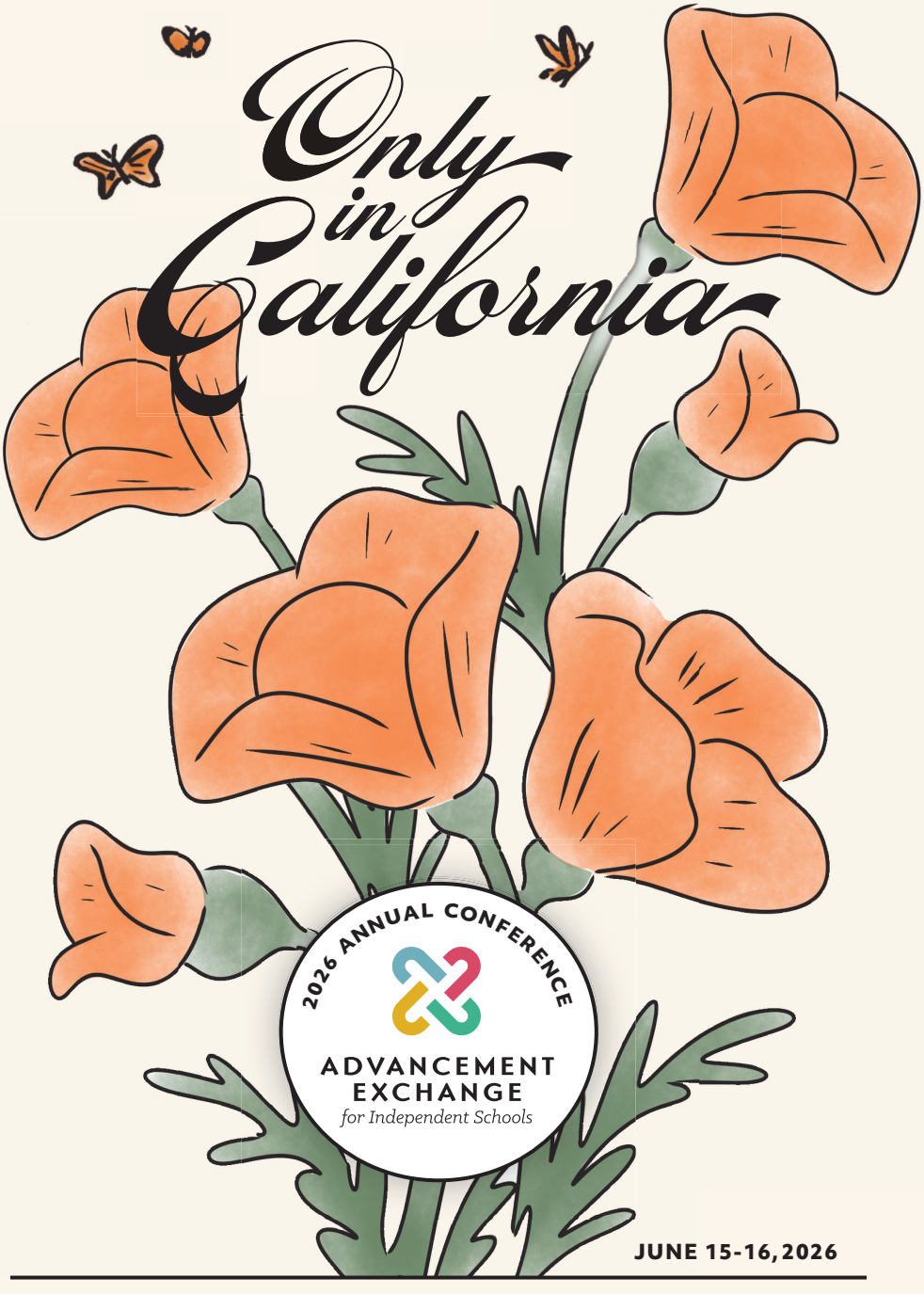
Only in California



2026 ANNUAL CONFERENCE

ADVANCEMENT EXCHANGE

for Independent Schools

JUNE 15-16, 2026

Hosted together at **SONOMA ACADEMY** *and* **SONOMA COUNTRY DAY SCHOOL**

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for Independent Schools

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Full participation in the 2026 AeXIS Conference is applicable for initial certification or recertification.

DAY ONE

Monday, June 15 | *Sonoma Country Day School*

10:30am-2:30pm	**Pre-Conference Deep Dive Sessions: Early Careers in Advancement & Advancement Leadership Intensive** *(Requires separate registration)*
2:30-3pm	**Arrival & Registration**
3-4pm	**Keynote with Priya Parker**
4-4:30pm	**Book Signing with Priya Parker & Networking**
4:30-5:30pm	**Plenary Panel Discussion**
5:30-6:30pm	**TEDx-Style Talks That Spark: Ideas & Entertainment**
6:30-8pm	**Networking Reception**

DAY TWO

Tuesday, June 16 | *Sonoma Academy*

8:30-9am	**Continental Breakfast & Networking**
9-10am	**Session One**
10:15-11:15am	**Session Two**
11:30am-12:30pm	**Session Three**
12:30-1:30pm	**Lunch, Roundtables, & Networking**
1:30-2:30pm	**Session Four**
2:45-3:45pm	**Session Five**
3:45-5pm	**Closing Networking Reception**



DAY ONE

Monday, June 15 | *Sonoma Country Day School*

2:30-3pm
Conference Registration

3-4pm
Opening Keynote with Priya Parker



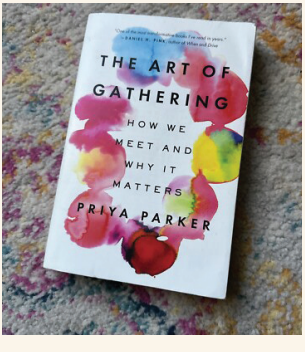
The Art of Gathering: Designing for Connection, Engagement & Innovation

This keynote is not to be missed. Priya's message about how we gather—and why it matters—will resonate deeply with everyone who has ever planned an event, led a campaign, or built a community of donors and volunteers.

Priya Parker is a facilitator, strategic advisor, acclaimed author of *The Art of Gathering: How We Meet and Why it Matters*, and executive producer and host of the New York Times podcast, *Together Apart.* Trained in the field of conflict resolution, Parker has spent 20 years guiding leaders and groups through complicated conversations about community, identity, and vision at moments of transition. She lives in Brooklyn, NY, with her husband and two children.

4-4:30pm
Book Signing with Priya Parker & Networking

Bring your copy of Priya's book or purchase a new one. Also enjoy reconnecting with colleagues from other schools, as well as meeting new ones.



4:30-5:30pm
Plenary Panel Discussion

AI for All: A Collective Dialogue on What's Actually Working in Advancement

Gayle Roberts | *Fundraising for Change*
in conversation with
Andrew Davis | *Head of School, Mount Tamalpais School*
Kimberly Eber | *Director of External Relations, Sonoma Academy*
Kaitlin Windle | *CEO and Founder, Apte*

Advancement teams are being asked to do more than ever, often with fewer resources and higher expectations. In this energizing plenary, Gayle Roberts cuts through the noise with a practical look at what's actually working in advancement today, including how AI is helping teams streamline workflows, reduce administrative load, and focus on the human-centered work that drives results.

Gayle will then moderate a candid conversation with a small group of leaders who bring a range of perspectives from across school leadership, data and operations, communications, and advancement. Panelists will share real examples from their work—what's working, what isn't, and what they're experimenting with as AI reshapes how schools operate. Audience members will also be invited to briefly share their own AI use cases, creating a collective bank of practical ideas.

You'll leave with concrete, real-world examples; "start tomorrow" strategies; responsible AI guardrails; and a clearer sense of how technology can help advancement professionals work smarter and elevate their impact.



5:30-6:30pm
TEDx-Style Talks That Spark: Ideas & Entertainment

Finding Yourself in the Equation: Self-Care as Professional Practice

Tesha McCord Poe | *CEO and Founder of Joy-Raising, LLC*

In a profession built on showing up for others, development leaders often forget the most essential person in the equation: themselves. As enrollment softens, budgets tighten, and the needs around us grow louder, the temptation to push harder and give more can quietly erode the wellspring our work depends on. This talk is an invitation to pause, reset, and reclaim the practices that let us not just survive this moment, but thrive in it. Drawing the critical distinction between self-care and self-soothing, Tesha offers a practical framework for a personal wellness toolkit—rooted in the radical idea that we don't need anyone else to tell us our own worth.

Tesha McCord Poe is the CEO and Founder of Joy-Raising, LLC, and a former Head of School and Chief Advancement Officer who has helped raise nearly $100 million for independent schools and nonprofits. Author of *Beyond Widow*, she brings her full self—fundraiser, leader, mother, widow, advocate—to the work of building a more joyful, inclusive philanthropic field.

Navigating by Compass: A Mindset Shift Toward Purpose and Becoming

Skye DeLano | *Legacy and Leadership Coach*

In a world where paths rarely unfold in straight lines, this session invites you to rethink how you move through your life and work. Instead of searching for the perfect map, you'll explore what it means to navigate by compass, anchoring yourself in values, curiosity, and the relationships that shape who you're becoming. We'll look at why 90% of life is the journey, how identity evolves far beyond any job title, and why everything ultimately leads back to connection. You'll leave with simple tools to stay oriented when things feel uncertain and a clearer sense of direction rooted in who you are and who you're growing into.

Skye DeLano is a Legacy and Leadership Coach and Fundraising & Philanthropy Consultant. With more than 25 years of navigating her own diverse career path—from fundraising and executive leadership to philanthropic advising and coaching—Skye knows what it's like to forge a new trail. Skye specializes in helping individuals and teams navigate transitions, and to create and implement plans that align with their values, passion, and joy.

Comic Relief, Elevated

Funny Frank Olivier | *Legendary Comedy*

Frank is an internationally acclaimed comedy performer and three-time world juggling champion known for his high-energy blend of physical comedy, juggling, magic, and audience interaction. A longtime Bay Area favorite, he has appeared on *The Tonight Show*, HBO's *Just for Laughs*, and *America's Got Talent*, and has shared stages with icons such as Robin Williams, Whoopi Goldberg, and Bill Murray. Known for his quick wit, fearless physical comedy, and uncanny ability to turn audience volunteers into show-stealing moments, Frank delivers unforgettable entertainment that leaves audiences laughing, amazed, and fully delighted.

Shaken, Stirred, and Zero-Proof: A Garden-to-Glass Experience

Scott Beattie | *Expert Mixologist*
Steve Turner | *Bartender & Consultant*
Marko Karakasevic | *Master Distiller*

This session brings together three innovators redefining what a great drink can be. Scott Beattie, a pioneer of Sonoma County's garden-to-glass movement and author of *Artisanal Cocktails*, is known for his visually stunning, ingredient-driven creations and influential bar programs. He's joined by Steve Turner, "The Brit Behind Bars," whose work with The Free Spirits Company has made him a leading voice in the zero- and low-ABV movement, crafting sophisticated cocktails without compromise. Rounding out the trio is Master Distiller Marko Karakasevic of Charbay, whose 13 generations of distilling expertise and natural storyteller's charm offer a spirited, behind-the-scenes look at how great drinks come to life. A dynamic mix of craft and creativity.

6:30-8pm Networking Reception

DAY TWO

Tuesday, June 16 | *Sonoma Academy*

8:30-9am
Continental Breakfast & Networking

9-10am
SESSION SERIES 1

Everything Is Awesome? LEGO + Annual Giving

Brittany Yantos | *Associate Director of Advancement, Drew School*

What if annual giving felt less like fundraising — and more like a celebration of community pride? This session explores the Brick by Brick campaign at Drew School, a LEGO-themed, participation-focused initiative that used friendly class competition to build belonging, momentum, and joy around giving.

In Brick by Brick, every family received a LEGO brick in their class color, symbolizing their part in "building" the community together. As each brick was returned with a gift, colorful brick displays and playful leaderboards tracked progress in real time, creating excitement, shared accountability, and a sense of collective accomplishment. This approach made giving visible, tangible, and fun — and it inspired families to participate not out of obligation, but because they wanted to be part of the story.

Participants will learn how to:

- Design competition that strengthens relationships rather than pressure or comparison
- Use physical symbols (like LEGO bricks) to create shared purpose and momentum
- Craft messaging that emphasizes belonging, pride, and community identity
- Build campaign infrastructure through volunteers, pacing, updates, and celebration rituals
- Adapt this model for schools, colleges, arts organizations, and nonprofits of varying sizes

We'll also discuss practical takeaways, lessons learned, and how to maintain a supportive and inclusive tone throughout the campaign. Attendees will leave with replicable frameworks and ready-to-use engagement tools.

This is community-building disguised as fundraising — one brick, one class, one shared goal at a time.

Collaborative Momentum: Launching a Comprehensive Campaign in Partnership with the Head of School, Board, and Campaign Steering Committee

Yukiko Meadows | *Director of Advancement, Katherine Delmar Burke School*
Michele Williams | *Head of School, Katherine Delmar Burke School*
Erin Phillips | *Partner, Gonser Gerber*

This real-world session will explore the collaborative approach the Burkes team took to launching a multi-million dollar comprehensive campaign in close partnership with school administrative and volunteer leadership.

We will cover our campaign preparation including vision development, stakeholder engagement and feasibility study, planning, and committee formation. We will also share our lessons learned about successfully transitioning from the planning phase to the quiet phase, as well as strategies you can consider for building early momentum and success.

The Other 364 Days— Turning Grandparents' Day into a Year-Round Strategy

Kate Merritt | *Director of Advancement, The John Thomas Dye School*

Many schools host a beloved Grandparents' Day—but what happens the other 364 days of the year? Grandparents are some of your most loyal champions, and when engaged strategically, they can become powerful ambassadors, volunteers, and philanthropic partners. In this session, we'll explore how to move beyond a once-a-year event to build a sustainable grandparent engagement program, sharing what a thriving model looks like—from meaningful touchpoints and volunteer opportunities to thoughtful cultivation strategies—and practical strategies for launching a grandparent program at your school. You'll leave with clear next steps to strengthen engagement and grow your advancement and giving pipeline.

Trendy with a Chance of Impact: A Practical Guide to the Big Picture

Felicity Meu | *Head of Partner Success, GiveCampus*

Discover the key trends shaping advancement strategy and execution—and how they apply to your institution. This session will share insights from a meta analysis of philanthropy research, GiveCampus data, and real-world examples. You'll leave with actionable tools and data to evaluate your performance, understand how peers are adapting, and identify opportunities for meaningful impact.

Next Step: Moving into Advancement Leadership

Amy Elmore | *Director of Advancement, Stevenson School*

You've built experience, delivered results, and become a reliable contributor within your advancement office, and now you're thinking about what comes next. Designed for mid-career professionals preparing for director-level roles in areas such as annual giving, alumni relations, or advancement operations, this session explores how to transition from doer to leader by developing stronger strategic thinking, communication, and management skills.

Participants will discuss practical approaches to managing up, preparing for effective 1:1 meetings, contributing ideas and solutions, navigating difficult conversations, presenting themselves confidently, and positioning themselves for long-term growth within advancement leadership.

10:15-11:15am
SESSION SERIES 2

Successful Fundraising in Challenging Times: How to Deepen Your Culture of Giving

Kim Eber | *Director of External Relations, Sonoma Academy*
Jennie Winton | *Founding Partner & Leadership Coach, Mission Minded*

Your old playbook may still be working—but if fewer families are giving, and more are opting out entirely, your culture of philanthropy isn't as strong as it needs to be.

In this session, Kim Eber, Director of External Relations at Sonoma Academy, and Jennie Winton, Founding Partner & Leadership Coach at Mission Minded, will unpack the forces reshaping school fundraising—from economic pressure and political polarization to a new generation of impact-driven donors. Together, they'll share practical strategies to strengthen relationships, sharpen your message, and build a more resilient culture of giving—one that meets families where they are and inspires them to invest in what matters most.

Gathering with Purpose: Reimagining School Events to Maximize Impact

Betsy Berman | *Assistant Head for Advancement and Strategy, Crystal Springs Upland School*
Kelly Sortino | *Head of School, Crystal Springs Upland School*

Kelly Sortino and Betsy Berman of Crystal Springs Uplands School will share how a moment of institutional fatigue and community disconnection led them to rethink the role of gatherings in advancement work and, in the process, strengthen both engagement and philanthropy at Crystal.

Drawing from Priya Parker's *The Art of Gathering* and Charles Vogl's *The Art of Community*, this session explores how small, intentional gatherings can rebuild trust, deepen relationships, and create the conditions for meaningful generosity. Faced with volunteer fatigue, declining responsiveness, and a growing sense of disconnection, Crystal developed a "Campfire" model: intimate gatherings designed to foster authentic connection.

Participants will experience elements of the Campfire model in real time and leave with practical frameworks and adaptable tools for creating gatherings that feel more human, mission-aligned, and impactful for their communities.

AI & Advancement: How Data, Teams, and Strategy Will Change in the Next Five Years

Kaitlin Windle | *Founder and CEO, Apte*

AI is rapidly becoming one of the most talked-about topics in advancement — but what will it actually mean for the work we do every day?

In this session, Apte Founder and CEO Kaitlin Windle will explore how AI is poised to reshape advancement operations, data strategy, and team structures. From predictive donor insights to automated reporting and smarter portfolio strategy, AI has the potential to transform how advancement teams operate and raise funds.

But harnessing AI effectively will start with strong data foundations. This session will explore how institutions can begin preparing now by strengthening their data infrastructure, standardizing key data structures, and reducing human error through automation. We will also discuss how AI may shift the roles of advancement teams, allowing staff to spend less time managing data and more time focused on donor relationships, stewardship, and frontline fundraising.

Participants will leave with a clearer understanding of:

- How AI is likely to impact advancement data and analytics
- What changes advancement teams should expect in the coming years
- Why clean, standardized data is essential for AI success



Alumni Engagement: Refreshingly Unfiltered— Real Stories, Honest Lessons, Ideas Worth Sharing

MODERATOR:
Adrienne Moon | *Director of Development, Presidio Hill School*

PANELISTS:
Sarah Rooney | *Director of Development, Harbor Day School*
Sam de Castro Abeger | *Director of Alumni Relations, Harvard-Westlake School*
Julie Kim-Beal | *Director of Alumni Relations, Head-Royce School*
Wendy Levine | *Director of Development, Mark Day School*

Alumni professionals from independent schools of all sizes, budgets, and team structures will share what meaningful and authentic engagement actually looks like on the ground — from events and volunteerism to affinity groups, ambassador programs, and stewardship practices. But this panel goes beyond the highlight reel. We'll make room for the programs that stalled, the events that flopped, the experiments worth repeating, and the lessons learned the hard way — the stories that rarely make it onto conference slides.

Expect candid conversation, tactical takeaways, and ideas you can adapt whether your alumni program is well established or still finding its footing. Come ready to contribute: your own bloopers, cautionary tales, and hard-won wins are welcome here.

Starting Now, Building Forever: Practical Strategies for Launching an Endowment Campaign

MODERATOR:
Nanci Kauffman | *Senior Consultant, CCS Fundraising*

PANELISTS:
Lyla Max | *Director of Development, The Nueva School*
David Hector Montes | *Senior Director at CCS Fundraising*

Whether you are establishing your school's first $3M endowment or seeking to double the size of your $50M endowment, this workshop will provide a roadmap for launching and scaling your efforts. A panel of seasoned professionals will share their practical steps for making the case, staying the course, and engaging a committee of volunteers and trustees in the cultivation, solicitation, and stewardship of gifts to the endowment. You won't want to miss this chance to learn more about growing the financial sustainability of your school.

11:30am-12:30pm
SESSION SERIES 3

Give for the ♥ of ____ : How to Re-Engage Your Community With Value-Based Giving

Francisca Guzman | *Director of Advancement, Live Oak School*
Lily Panetta | *Associate Director of Annual Giving, Live Oak School*
Nathaniel Okun | *Head of Product, Boost My School*

"I already pay tuition, you're asking for more money?"
Donor fatigue is real and a common challenge across K-12 schools. Learn how Live Oak School re-engaged their community on their Day of Giving by focusing on value-based giving. They replaced transactional asks, such as "Support adjusted tuition," with evergreen messaging like "Give for the love of access." This new approach resonated with their community, resulting in 337 supporters and 38 organic comments on their Giving Day.

This session is for advancement teams that want to beat donor fatigue. Francisca Guzman, Director of Advancement, and Lily Panetta, Associate Director of Annual Giving, from Live Oak School will explain how their segmented engagement strategies, from an 8th grade speaker panel to a phone-a-thon to special "values stickers," reinvigorated their community. By the end of this session, you will have both the inspiration and framework to turn "you're really asking me for more money?" into "I'm happy to support the school I love."

Strengthening Advancement Work Through Legal Know-How

Casey Williams | *Partner, Liebert Cassidy Whitmore*

Among the many things advancement professionals must navigate, there is the law! But the law doesn't have to be scary or unknowable! It's often about knowing that the law exists, how to spot issues, and when to ask questions. To help you do that, in this session, we'll provide an overview of three common legal issues that arise frequently for advancement professionals at private schools: the legal status of parent associations; raffles; and endowments. For each, we'll equip participants with a solid working understanding of these issues, core legal principals to shape your approach, and clear guidance to provide you the confidence you need to spot issues and ask legal questions with confidence!

Why Alumni Giving Still Matters

Sara Billings | *The Thacher School, Director of Advancement: Alumni and Development*

As national trends point to declining donor participation and increasing pressure to focus on fewer, larger gifts, many schools are rethinking the role of broad-based alumni giving. This session makes the case that participation fundraising still matters—and may be more important than ever. Regardless of the size of your organization and your budget, your school can benefit from alumni giving campaigns.

Drawing from the experience of The Thacher School, where alumni participation recently reached 48%, we'll explore how reunion giving, young alumni programs, virtual giving days, student phonathons, volunteer fundraising committees, and other engagement-driven strategies can strengthen both philanthropy and community. We will discuss exactly how you can learn from an established alumni giving program and scale it to your advancement practice.

Alongside practical examples and campaign ideas, the session will examine broader national trends in donor behavior and advancement strategy, including why some institutions are moving away from participation-focused models—and what may be lost when they do.

This presentation is designed for advancement professionals at schools of all sizes, including smaller shops, younger institutions, and teams working to build more intentional alumni giving programs with limited resources.



3

Career Session: Learning to Follow Your North Star

Skye DeLano | *Coach, Skye DeLano Coaching*

For most of us, the career path isn't a straight line—it's a winding journey of opportunities, challenges, and questions. So how do you navigate without a map? By learning to follow your North Star. This session offers a powerful mindset shift: moving from a rigid plan to a purpose-driven direction. You'll walk away with practical tools to navigate your unique path, guided by curiosity and a clearer sense of your own true north. Whether you're seeking more impact in your current role or feeling the pull toward something new, you'll leave with the clarity and confidence to take your next right step.

What I Wish Advancement Knew as a Head of School

MODERATOR:
Marlene Sloger | *Advancement Consultant*

PANELISTS:
Mike Hanas | *Executive Coach + Leadership Consultant, Furthering Leadership*
Tracie Mastronicola | *Head of School, The Healdsburg School*

What do Heads of School really wish advancement professionals understood? And maybe more importantly…what do advancement folks wish they could ask their Head of School but rarely do?

This session is designed to be honest, candid, thoughtful, and just a little bit spicy.

Moderated by advancement leader, Marlene Sloger—who has had the unique pleasure of working alongside both Mike Hanas and Tracie Mastronicola—this conversation will pull back the curtain on the Head/Advancement relationship. Marlene will ask the questions many of us have quietly wondered about for years: What actually matters most to Heads of School? What drives them nuts? What do they wish advancement teams did more of? Less of? What keeps them up at night? And what does true partnership really look like?

Bringing both seasoned and newer Head of School perspectives, Mike and Tracie will offer real talk, real stories, and real answers from the other side of the office door. And because the best conference conversations usually happen after the session ends in the hallway…we're bringing those questions into the room. Audience members will be invited to ask the questions they've always wanted to ask a Head of School but maybe hesitated to voice out loud. Consider this your moment.

You'll leave with greater empathy, sharper insight into the Head/Advancement dynamic, a few laughs, and perhaps most importantly, the reassuring reminder that we're all just humans trying to do meaningful work together.

12:30-1:30pm
Lunch, Roundtables, & Networking

1:30-2:30pm
SESSION SERIES 4

Breaking Down Silos: How Strategic Partnership Between Advancement and DEIB Strengthens Community, Belonging, and Giving

Emma Balina | *Director of Development, Crane Country Day School*
Michelle Holmes | *Director of Diversity, Equity, Inclusion, and Belonging, Crane Country Day School*
Francisca Guzman | *Director of Advancement, Live Oak School*
Adrian Takyi | *Director of Diversity, Equity, Inclusion, and Belonging, Live Oak School*

Let's be honest: Advancement and DEIB offices often feel fundamentally at odds. Advancement relies on cultivating major donors and providing differentiated stewardship experiences. DEIB work emphasizes equity and equal access. These can appear to be competing values, leading to real tensions: Advancement professionals may see DEIB colleagues as the "fun police." DEIB leaders may worry that advancement priorities reinforce existing inequities.

This session demonstrates how two independent schools—one on a 10+ year journey, one just two years in—have developed partnership models that acknowledge these real differences while finding authentic common ground rooted in school mission and values. Through Live Oak School's governance approach (bringing Advancement and DEIB Board committees together on shared projects) and Crane Country Day School's operational model (a Fun Family Friday cultural engagement series), attendees will learn how both pathways lead to the same breakthrough insight: these offices share the same fundamental goal and complementary strategies for strengthening community, and thus, strengthening support.

Building Relationships with High Capacity Families

Nancy Kehoe | *Director of Advancement, Mount Tamalpais School*
Jim Zimmerman | *Senior Consultant and Principal, Leader of the Schools Practice, Marts&Lundy*

This session will provide participants with actionable takeaways on cultivating meaningful relationships and connections with those families who have the capacity to be a school's largest and most impactful donors. Come to this session to gain clarity of how to identify these donors, understand the challenges and opportunities of working with these families, as well as the psychology behind some of their giving. Session attendees will learn strategic approaches to engage high capacity donors for any fund or effort at your school.

From Oversight to Engagement: Building a Fundraising-Focused Development Committee

Phil Higginson | *Consultant, Independent School Management (ISM)*
Yukiko Meadows | *Director of Advancement, Katherine Delmar Burke School*

Many school development committees spend too much time reviewing reports and too little time advancing philanthropy. This session will explore how to build a fundraising-focused development committee that serves as a strategic partner to the school's major gifts effort. Participants will examine how to define the committee's purpose, clarify trustees' roles in relationship-building with leadership donors and prospects, and align committee work with donor-cycle activities. The session will also address how the committee can provide appropriate oversight of the overall development plan and fundraising policies without becoming consumed by day-to-day operations.

Participants will:

- Identify the core purpose and structure of a fundraising-focused development committee.
- Clarify the role of trustees in identification, engagement, solicitation support, and stewardship of leadership donors and prospects.
- Distinguish between appropriate committee work and development office operational responsibilities.
- Explore agenda and meeting practices that keep the committee focused on relationship-building and fundraising results.

From Messy to Meaningful: Mastering Your Data for Maximum Impact

Mike Smith | *Consultant, Kiptum Consulting*

Jami Johnson | *Advancement & Enrollment Coordinator, Hillbrook School*

This session aims to tackle one of the most common — and costly — challenges in advancement work: messy donor data. Presenters will walk through how to recognize when your database needs a reset and how to prioritize cleanup in a way that's both practical and impactful. Drawing on real experiences from Hillbrook School, the session explores how data issues — like missing soft credits, misattributed gifts, and information scattered across multiple spreadsheets — can turn routine tasks into hours-long ordeals, limiting your fundraising potential and causing meaningful donor engagement to slip through the cracks. Attendees will also learn strategies for keeping data clean, including how to navigate the tension between business office priorities and the needs of the development team.

Beyond the Welcome Folder: Designing New Family Onboarding

Lindsay Newlove | *Director of Parent Engagement, Cate School*

Hannah Rich | *Advancement Manager for Parent Engagement & Philanthropy, The Hamlin School*

Meredith Robbins | *Chief Advancement Officer, Polytechnic School*

The time between a family enrolling and the first month of school is a critical window for building trust. For advancement professionals, this period is about more than just sending out login credentials and calendars. It is the best opportunity to introduce parents to your school's culture and set the stage for long-term engagement, involvement, and philanthropy. In this session, we will focus on intentional community building and expectation setting, and participants will leave with a practical plan to improve their onboarding process, helping new parents feel genuinely connected to the school from the start.

2:45-3:45pm
SESSION SERIES 5

Catalyzing Mission Through Strategic Event Design

Carolyn Woolf | *Assistant Head of School, Marin Montessori School*
Shree Starkman | *Director of Development & Community Engagement, Marin Montessori School*

In many independent schools, fundraising events are high-burn, time-intensive efforts that are difficult to evaluate for a clear return on investment. This session explores how schools can move from transactional gatherings to transformational experiences that function as living expressions of a school's values, pedagogy, and purpose.

Drawing on the evolution of The Gather for Good, a mission-driven speaker and fundraising series, this talk examines how schools can elevate annual events through curated themes like climate leadership, artificial intelligence, and the future of education. This session explores how strategically designed events can move beyond one-night galas to become cohesive learning experiences that engage students, faculty, parents, and alumni around the most pressing issues shaping our children's future

Participants will leave with a practical framework for designing events that integrate thought leadership, student voice, and adult learning; strengthen community cohesion; and clearly articulate the distinctive value of their school in a rapidly changing world.

Little Shop of Stewards

Rachelle Doyle | *Director of Advancement, Sacramento Day School*

Stewardship does not require a large staff or unlimited resources. This session will share how a three-person advancement team stewards donors effectively, authentically, and at scale. We'll explore practical donor segmentation strategies that help small teams work smarter and share how we've built our stewardship plan, aligned communications across channels, and leveraged events as meaningful touchpoints. We'll also discuss when and how to bend the rules, inject fun, and personalize engagement to deepen relationships without burning out.

What to Know Before You Launch and After You Close a Campaign

Laurel DeMaria Dobbin | *Campaign Director, De La Salle High School*
Johnny Avots-Smith | *Director of Advancement, Head-Royce School*

Ready to launch a campaign? Not sure where to start? Already closed and wondering what's next? This practical, candid session brings together experienced advancement leaders to share what they wish they had known at the start — and what truly matters at the finish. Together, Laurel and Johnny will offer an honest conversation on campaign strategy, timing, pitfalls, stewardship, and sustaining momentum after the goal is reached. Designed for advancement professionals at every stage of the campaign lifecycle.

Utilizing Your Communications Superpower to Enhance Your School

Lauren Pitcher | *Director of Marketing and Communications, The San Francisco School*

Communication is more than just responding to a crisis. It is a tool that unlocks the key to introducing new families to your school, building connections and engagement, and proactively sharing information with your constituents. This session will provide insights into how your school can begin to think more strategically about communications and utilize it as a superpower that will not only be used in times of need but also continually strengthen your brand reputation and maximize your impact.

Advancement Is a Team Sport: How Schools Can Distribute Work Across Campus

Mattingly Messina | *Founder, Throughline*

When advancement capacity is limited, the strongest schools get creative. Heads, administrators, faculty, volunteers, and trustees must each understand their role in building the relationships that strengthen fundraising and financial sustainability.

This session focuses on how schools can distribute advancement responsibilities effectively across campus. Participants will explore how different departments and school leaders—from the Enrollment Director to the CFO—can support advancement efforts through relationship-building, communication, stewardship, community engagement, and increased awareness. Drawing on firsthand experience as a trustee, consultant, and former Advancement Director, Mattingly will share ways schools can better leverage their teams' relationships and expertise to strengthen fundraising.

3:45-5pm
Closing Networking Reception

Advancement work is complex. You don't have to do it alone.

The Advancement Exchange for Independent Schools (AeXIS) brings together California's independent school advancement professionals from all career stages—from emerging leaders to seasoned heads of advancement and schools of all sizes—to learn, connect, and lead more effectively.

Why AeXIS?

Built *by* advancement professionals *for* advancement professionals, our members gain affordable, strategic access to practical insights, high-quality professional learning, and a trusted network of peers.

ADVANCEMENT EXCHANGE
for Independent Schools

MEMBERSHIP CONNECTS YOU TO

- **A statewide community of colleagues** who understand your work and your challenges.
- **Timely professional development** across fundraising, stewardship, alumni relations, communi cations, events, and data systems.
- **Best-practice sharing** that is candid, generous, and grounded in real school experience

MEMBERS RECEIVE

Annual Statewide Advancement Survey ● Benchmarking data and strategic insights drawn from California independent schools.

Monthly Virtual Workshops ● Practical Think Tank Thursday sessions led by experienced practitioners and experts.

Peer Knowledge Exchange ● Ongoing access to listserv forums, focus groups and mentors; shared resources for real-time problem solving, collaboration, and support.

Annual Conference ● A thoughtfully designed and affordable statewide gathering for learning, connection, and inspiration.

Job Board ● Access to posting open positions and connecting with experienced candidates across our membership community.

Join a community that understands your work and helps you do it *better*.

Schools join AeXIS through annual institutional dues, scaled by enrollment, similar to other professional associations. Membership is also available to consultants and contractors who work in the advancement field.

Learn more at www.advancementexchange.org.
For questions, please reach out to Christine Downie, our AeXIS Program Manager, at cdownie@advancementexchange.org.

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