



## Through the Looking Glass

### Speaker Biographies

#### Armando Zumaya, Keynote Speaker

Armando Zumaya has been in fundraising for 31 years in a variety of roles that have given him a unique perspective on development offices, prospecting and role of prospect research/management. He is currently an active Chief Development Officer.

He has spent the bulk of his fundraising career as a Major Gift, Leadership Gifts and Annual Fund Officer on two \$1+ billion dollar campaigns at Cornell University and the University of California, Berkeley. He began his career in 1985 as a canvasser for SANE/FREEZE in Los Angeles and Ithaca N.Y. where he led door-to-door canvassers in the field for 5 years. He has served in the Vice President of Development, Director of Major Gifts and Chief Development Officer, Annual Fund and Leadership Gift roles.

He is well known for his work in teaching prospecting, solicitation, cold calling, major gifts techniques and remote constituency fundraising. He has been a tireless advocate for improving the Prospect Researcher/Fundraiser relationship and creating a prospecting culture inside development teams.

He also speaks about the rise of Latino Major Giving in the US through his direct experience raising major gifts in the Latino community. He emphasizes the need for a new vision of Latino philanthropy throughout our nonprofit community.

He is a well-known and well-reviewed speaker. He lectures at AFP, The Foundation Center, AFP Chapters, AFP Hemispheric, The Foundation Center, Development Executives Roundtable, APRA, APRA Chapters, CARA, SAWA, MARC, Compass Point, Blackbaud, Forum on Fundraising and Academic Impressions.

He has been widely published including the nationally acclaimed OpEd in the Chronicle of Philanthropy on March 24, 2014 entitled "Give Fundraising Researchers More Influence and More Credit". He has also been published in the Grassroots Fundraising Journal, Currents (The Magazine of CASE) The Major Gifts Report Fundraising Compass, Bloomerang, Frost on Fundraising and others.

His three recent articles "The Crisis of Development Officer Short Tenures", "Silent Service" and "The Nonprofit Achievement Gap" has earned him national recognition.

He lives in Northern California and is a proud alumnus of the University of California, Riverside and Roosevelt HS in East Los Angeles.

## **Therese Aloia**

### **University of Florida**

Therese Aloia is currently Interim Associate Director of Donor Engagement in the Office of Donor Relations at the University of Florida. Since joining the Donor Relations team in 2015 as an Assistant Director, she has served as liaison to colleges and units, and produced customized engagement plans with development officers for donors. Therese utilizes her research skills and available resources to create strategies that foster positive relationships with internal and external stakeholders. She also project manages the largest annual thank-a-donor day event at UF, Grateful Gator Day. With 10 years of higher education experience, Therese enjoys facilitating discussions, encouraging collaboration, and team success. Previously, Therese worked in the Donor Relations office at Florida Atlantic University where she designed and produced annual endowment reports and collaborated with colleges/units on acknowledgements, recognition and events. Therese holds two masters degrees, is a published author, and enjoys presenting at regional, state and international conferences.

## **Sharon Brown**

### **University of Florida**

Sharon Brown is a Prospect Strategy Analyst for the Herbert Wertheim College of Engineering at the University of Florida. A graduate of UF's College of Liberal Arts & Sciences, she is happy to have found a career that marries reading, writing and curiosity. Sharon also writes a monthly book review for a local business magazine. She and her husband, also a CLAS alum, live in Gainesville.

## **Paul Caspersen**

### **University of Florida**

Paul Caspersen is the Assistant Vice President for Gift Planning at the University of Florida. He brings complex financial thinking to the charitable planning field. As a Certified Financial Planner, Paul has 20 years of financial, estate, and charitable planning experience. Paul and his office are tasked with an overall combined Gift Planning goal over \$115 Million annually in deferred, real estate, and other complex gifts. He is a key member of the Senior Management Team that is directing UF's next comprehensive campaign.

Paul was the Executive Director in the Office of Gift Planning at the Iowa State University Foundation from 2009 to 2013. Prior to that, Paul was a Wealth Management Advisor with TIAA-CREF and served as the Firm's Managing Principal for Iowa. Mr. Caspersen earned a Bachelor's degree from the University of Northern Iowa and a Master's degree in Financial Planning from the College for Financial Planning in Denver, CO. Paul is author of the financial planning book entitled, "Direction Memo: How to Write a Letter of Instructions for Your Estate Plan."

## **Mark Egge**

### **Greater Twin Cities United Way**

Mark Egge is currently the Senior Manager of Prospect Management at Greater Twin Cities United Way in Minneapolis, before which he led Prospect Development at Carleton College, overseeing prospect research, prospect management, and fundraising analytics. Mark is a former President of APRA Minnesota and has been active as a volunteer leader with APRA and his local chapter since 2006.

Mark is a Co-Chair of the annual New Researchers Symposium, and in addition to presenting on prospect development fundamentals, his professional interests range from specific topics like SEC filings to broader concepts related to management, leadership, and power and influence. His education background is in music, and his master's thesis uses data visualization techniques to aid in the analysis of post-tonal compositions. Incidentally, when asked about this, he will go on at length (and without irony) about the profound similarities between music and prospect development. The most common descriptor Mark's colleagues use to describe him is "nerd."

## **Charles Snyder**

### **Nova Southeastern University**

Charles Snyder is the Director of Prospect Management and Advancement Research at Nova Southeastern University. He earned a BA and MA from the University of West Florida and MFA from Loyola Marymount University. Charles has led the development research and prospect management teams at several public and private universities.

Charles has served in multiple volunteer roles within the non-profit community. He is currently a board member of Debbie's Dream Foundation and the president for the Florida chapter of the Association of Professional Researchers for Advancement (APRA). He has been a writer and guest editor for APRA's Connections, has presented for AFP, CARA, and for several APRA International Conferences and is a content review panelist for the Prospect Research Institute's Insider Stock and Compensation program. Charles volunteers in the community by actively supporting his children's activities and as the founder of and trail running virtual community monitor for the Northwest Florida Trail Runners. He spends as much time as he can outdoors and in the wonderful natural areas of Florida and the Southeast.

## **Charity Tubalado**

### **City Year**

Charity is Director of Prospect Research for City Year, Inc. City Year is an education-focused national service organization founded in 1988 that is dedicated to helping students and schools succeed. It partners with public schools in 27 urban, high-poverty communities across the U.S. and through international affiliates in the U.K. and South Africa.

Prior to City Year, Charity worked with Combined Jewish Philanthropies of Greater Boston and the Alzheimer's Association. She began her fundraising career working for former Massachusetts Senator John Kerry. Charity began her career in research at Cornell having published works on European immigration & international security.

She holds a Master's in Public Administration from Cornell University and a B.A. from the University of Florida (Go Gators!).