

Agenda

Day 1: Spark

MONDAY, OCTOBER 5

10:30 AM – Registration Opens

Arrive, settle in, and connect with fellow attendees before the experience begins.

12:00 PM – Curated Excursion Experiences

Your Catalyst experience begins before the first session.

Whether you selected the Golf Simulator Experience, the Hippy Viking Hike, or the Innovation Tour at the Rosborough Wellness and Brain Health Center, each experience was designed to create space for conversation, perspective, and meaningful connection.

5:30 PM – Headshot Happy Hour

Professional headshots are included as part of your summit experience.

Enjoy a relaxed networking reception while updating your professional image and connecting with peers from across the field.

6:30 PM – Welcome and Opening Remarks

J.D. Shuman will open the summit with perspective on where philanthropy stands today, what leaders are navigating, and the opportunities ahead.

7:30 PM – Evening Close

Agenda

Day 2: **Activate**

TUESDAY, OCTOBER 6

8:30 AM – Breakfast and Networking

9:00 AM – Benchmarking the Industry

Led by Irina Thompson

A closer look at where fundraising in senior living has come from, where it stands today, and where it is headed.

10:30 AM – Building a Business Case for Development and Demonstrating Return on Investment

Led by J.D. Shuman

Explore how philanthropy supports organizational performance, operational goals, and long-term sustainability.

12:00 PM – Lunch and Networking

1:00 PM – Ethics in Fundraising and Annual Giving Strategies That Create Major Gifts

Led by Susan Mayernick and J.D. Shuman

A candid discussion around ethical considerations, donor engagement, and how annual giving strategies can support larger philanthropic outcomes.

2:30 PM – Sophisticated Planning for Current and Future Residents

Led by J.D. Shuman

Learn how strategic gift planning can support residents, families, and organizations through thoughtful, long-term approaches to giving.

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Day 2: **Activate**

TUESDAY, OCTOBER 6

4:00 PM – Leadership Panel and Q&A

Featuring Jeff Coates, Doug Myers, Susan Mayernick, Irina Thompson, and J.D. Shuman

A real-world conversation centered on what leaders are seeing across organizations today, where challenges are emerging, and how teams are adapting.

5:00 PM – Closing Remarks and Post-Summit Social



Ignite What's Next in Philanthropy