



Philanthropy Counts®

Seminars
for Fundraisers

attend. learn. connect. excel.



CORE AGENDA Costa Mesa 2025

Faculty will continue to update their Sessions as new information becomes available.

Moves Management Part I & Part 11 — Douglas Dillon

Moves Management is a system for building deep, life-long affinity and Commitment with probable donors. These relationships reliably lead to major gifts. This is true no matter how your organization defines a major gift. Learn the process for identifying your prospects for Moves Management; Understand who do you involve in the process; Learn about successful cultivation plans—Setting cultivation objectives; Checklist for incorporating Moves Management into your life. Measuring your progress.

Securing the Visit & Making the Ask — Tammy Zonker

Jerold Panas said, *'If you get the visit, you're 85% on your way to getting the gift.'* This session explores ways to secure the visit and make the ask with even your most elusive supporters. Distinguish the barriers to securing the visit and how to navigate them; Explore your fears about asking for money; Be introduced to an asking framework informed by empathy and authenticity.

The Art of the Ask — Tammy Zonker

Taking a deeper dive into making the ask, this session expands upon the asking framework through role-play demonstration and exercises. Deepen your understanding of our asking framework; Strengthen your asking skills through scenario-based role-playing; Consider the donor's experience by being solicited through role-play.



Philanthropy Counts®

Seminars for Fundraisers

attend. learn. connect. excel.



Inside the Head & Heart of a Philanthropist — Beau Cummings

Interview with major gift donor. This session is designed to help us understand the spirit, the heart and the motivation of those who give major gifts. What is the best way to make initial contact. How do we introduce ourselves. Is it acceptable to ask certain questions, what questions are off limits, and how do we convey the importance of our mission? Understand how we can best present ourselves and the impact of our institution from the perspective of a donor—after all, it is important to cultivate this relationship in a way that is meaningful to your donor.

Foundation and Grants — Birgit Burton

In this session we will explore the fundamental strategies and best practices essential for securing grants from foundations. Starting with aligning your organization's mission with priorities of potential funders. We will then delve into the intricacies of crafting compelling grant proposals, emphasizing clarity, impact, and sustainability. And hear real-world examples and practical tips garnered from years of experience in the field. You will learn the value of cultivating relationships with foundation representatives through effective communication and stewardship; you will gain a good bit of the knowledge and the tools necessary to navigate the complex landscape of foundations grant seeking and enhance your organization's funding prospects.

Listening the Gift — Douglas Dillon

Listening is one of the most crucial components of securing major donor support. Yet a great majority of fundraisers and nonprofit leaders struggle with doing so, until now. Listeners always outraise talkers; We will discuss asking questions that will provide understanding what your probable donors will respond to.

Integrated Communications Inspiring Donors in the Age of Digital Fundraising — Jeff Spitko

In the world of direct response fundraising, the key to success is getting the right message, to the right person, through the right channel, at the right time. How do you integrate your messages cohesively across all channels, especially digital, to maximize the performance of fundraising campaigns? How do you balance your online solicitations with stewardship? How are you conveying the impact of a donation? Learn how to leverage data, comprehensive testing, and creative content to convert prospects to donors, retain them, and grow their loyalty to your organization.



Philanthropy Counts®

Seminars for Fundraisers

attend. learn. connect. excel.



Attract, Retain & Develop Major Gift Fundraisers — Russell Dunlavy

Does the strength of your mission outweigh the strength and abilities of your team?

The ability to recruit, retain, and develop major gift fundraisers is one of the most critical elements of a successful major gifts program. On the heels of a pandemic, and shortage of talented, experienced fundraisers, what are you doing to make your organization stand out as a destination operation for development professionals? We will discuss the impact of a changing workforce; remote/flex work, performance metrics, professional development, and other keys to making your organization become a top employer for development professionals.

Thinking Bigger, Bolder & Braver — Tammy Zonker

Are we truly making the impact we dream of, or have we settled into a comfort zone of safety and compliance? Have we lost sight of our greater purpose? Are we merely checking boxes, or are we truly transforming lives and communities? Join us on a journey of thinking bigger, bolder, and braver. Reconnect with why you do this work; Gain insights by asking brave questions about your organization; Identify what big, bold, audacious goal you might aim for if you knew you could not fail; Get thought-provoking questions to engage your executive and board leadership in thinking bigger, bolder, and braver!

Strategies in Involving Your Organization's Grateful Families, Individuals, and Supporters — Ashley Nall

Sending a direct mail piece, posting on social media, or hosting an event is not going to attract the donors of today and the future. In this ever-changing landscape, attracting prospective donors to give to the mission of our organization is one of the biggest challenges we face. Once we have attracted the donors to support our cause, we need to ensure they are in the right portfolio and stand out in our stewardship work to keep them engaged. During this session, we will discuss strategies on how to get and keep grateful families, individuals and supporters giving, and giving again, to your mission. This will include a dive into building our pipeline and targeted portfolio performance. Participants will acquire skills in developing comprehensive fundraising strategies tailored to their mission, goals and target audience. You will understand the importance of targeted portfolio work including tracking metrics, measuring outcomes and adjusting strategies based on audience.



Philanthropy Counts®

Seminars for Fundraisers

attend. learn. connect. excel.



Stewardship Panel:

Effectively Stewarding Donors for Retention & Growth — Tammy Zonker and Faculty

With declining household giving and donor retention in the U.S. and Canada, stewardship has never been more crucial. This panel of experts will share their successful approaches to stewardship that keep donors giving. Time will be allotted for participant sharing and Q&A.

Planned Giving: Because a Little Planning Goes a Long Way — Angela Burgess

“Planned Giving” often seems like a fundraising strategy that lives in a vacuum, belongs to another department, or a tactic your organization simply isn’t ready for. The reality is that people, their money, and their motivations are all interconnected. In this session, you’ll learn how to comfortably begin the planned giving conversation with your donors, questions to ask to gauge how intentional your donors are when it comes to giving, and strategies to help them get the most out of their generosity.

Fundraising Strategy and Plan Development — A process for developing the ultimate data-informed, donor-centric, fundraising plan — Tammy Zonker

This is where fundraising best practice meets *new* thinking. Assess what’s working well and could be scaled. As well as what’s woefully under-performing and should be reimaged or retired altogether. Identify strategies and tools missing from your fundraising program. Explore budgeting for innovation. Engage board members and other leaders in executing the plan, leveraging their unique skills, expertise and influence.

Lead Generation: Donor Acquisition Strategies for Building Your

Base of Supporters — Jeff Spitko

The path to closing a major gift can often be a long one, and it starts with building a base of dedicated advocates for your mission. New donor acquisition takes time, patience, and requires finding prospects through numerous direct marketing channels. In this session you’ll learn how to create donor journeys that inspire those currently unfamiliar with your mission, convert your social media followers to email subscribers, upgrade your email subscribers into mass market donors, and implement innovative cultivation methods for building a successful donor pipeline through digital prospecting.



Philanthropy Counts®

Seminars for Fundraisers

attend. learn. connect. excel.



Planned Giving: Because a Little Planning Goes a Long Way — Angela M Burgess

“Planned Giving” often seems like a fundraising strategy that lives in a vacuum, belongs to another department, or a tactic your organization simply isn’t ready for. The reality is that people, their money, and their motivations are all interconnected. In this session, you’ll learn how to comfortably begin the planned giving conversation with your donors, questions to ask to gauge how intentional your donors are when it comes to giving, and strategies to help them get the most out of their generosity.

Leveraging Generative AI to Increase Major Gift Fundraising Results — Tammy Zonker

In this session we explore how generative AI can equip frontline fundraisers to significantly enhance major gift fundraising results, streamline processes, and personalize donor experiences like never before.