



Philanthropy Counts®

Seminars  
for Fundraisers

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## ROUNDTABLE TOPICS Costa Mesa 2025

*Faculty will continue to update their RoundTable sessions as new information becomes available.*

### **Professional Development—Owning Your Own Trajectory — 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. We have all read about the shortage of experienced and talented fundraisers, so what are you doing to make your organization stand out as a destination of choice 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.

### **Challenges and Opportunities for Advancing Your Team — Ashley Nall**

51% of nonprofit fundraisers in the United States intend to leave their current employer in the next two years as they face a growing array of workplace frustrations. While the cost of losing an employee, costs up to 200% of their salary, benefits, and expenses. For some, we need to bless and release them as they may not be the right fit. However, for many they can succeed as we work to invest and advance our team members. We will also discuss those gift officers on our teams working to transition from annual gift work, to mid-level work then onto major, principal or planned gifts. During this roundtable, interactive discussion we will dive into the challenges we are seeing in today's workforce and the opportunities to invest in and advance our team members.

### **Becoming a Supervisor — Your goal is management; how will you get there and what happens once you land your dream job — Shannon Duval**

As you grow your career, a promotion into management may be a consideration. This transition could happen with your current employer, or it could be an opportunity with a new organization; both options present an exciting step in your career growth. First you need to get the job and to do that you need a plan for how to present your best self to those who are making an important decision. Secondly, managing people is rewarding and challenging; you were chosen to take on this responsibility so prepare and do it right. Let's discuss how you will utilize your skills and model the best practices and behaviors to ensure that you are a confident and successful manager from the start.



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### **Transforming Your Annual Giving and Major Gifts Program in Preparation for a Major Gift Initiative or Capital Campaign** — Douglas Dillon

Learn the critical decision points in selecting the appropriate funding model. Discover the 21 significant factors in assessing the right time to launch your program. Prepare staff, administration, and board members to optimize success.

### **The Intentional High-Performance Fundraiser** — Tammy Zonker

Too often the work of donor development comes second to urgent event activities or grant application deadlines. The Intentional Fundraiser is a system for developing high-performance fundraising professionals. Learn strategies for increased efficiency; Gain tools for reducing stress and avoiding burnout; Get clarity on your top priorities and consider what you should delegate or stop doing!

### **Experimenting with Email** — Jeff Spitko

Email is without a doubt the best way to test with your audience. Whether it's content, cadence, or subject lines, you can learn a great deal about what inspires your donors through email testing. In this breakout session, we'll discuss tips of the trade that will help you take your digital storytelling and email performance to a new level.

### **Turning Obstacles into Opportunities** — Terry Sylvester

As fundraisers, we often find ourselves in situations we aren't prepared for, we couldn't have imagined or didn't want to be in, leaving us questioning if we are in the right profession. Instead of being discouraged by challenges along the way, we can make the most of them by turning them into opportunities, using them to equip us with even better skills going forward. Learning some things, the hard way is the only way. You will make mistakes; however, there is plenty that can be gained from lots of practice and from learning from those with experience. In this Round Table, we will talk about things we didn't know when we became fundraisers, some of the toughest challenges, and how we can be the most effective messengers in spreading the joy of generosity and making a difference in the lives of others. As one great fundraiser said, "We don't have problems, we have opportunities!"



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### **The Accidental Fundraiser** — Birgit Burton

Diving into fundraising can feel like navigating uncharted territory, especially when it wasn't your initial career plan. But fret not, many successful fundraisers have walked a similar path. Here's how you can navigate this journey while overcoming imposter syndrome and mastering the art of fundraising. Remember, every successful fundraiser started somewhere, and it's okay to feel uncertain as you embark on this journey. With dedication, continuous learning, and a passion for your organization's mission, you'll gain the confidence and skills needed to excel in your role. Hang in there—you've got this, and I will share some tips that will help you along the way.

### **Qualities a CEO Looks for in a CDO — Interview Techniques & Your Career Tool Box** — Beau Cummings

Understanding and prioritizing the top qualities a CEO is looking for in a Chief Development Officer. Reviewing top functional responsibilities for the Chief Development Officer. Interviewing Techniques & Tips — People tend to find reasons to eliminate candidates from the short list rather than searching for reasons to interview them. Therefore, reduce the reasons you could be eliminated by the reviewers. Being selected for an interview means you are being seriously considered. We will review multiple elements for a successful interview.

### **Planned Giving Made Easy** — Angela Burgess

QCDs, DAFs, CRTs – Oh My! When it comes to planned giving, it may seem like there's a mountain of information to learn before you can ever be prepared to ask for a gift. Planned Giving doesn't have to be complicated and you are more than capable of learning everything you need to know to walk into a donor meeting with confidence. In this roundtable discussion, you'll learn about different types of planned gifts, which gifts may be applicable to which donors, and what questions to ask to determine which – if any – path to go down. Sit back, relax, and let's have some fun with giving from cash alternatives!