

Canada's Fundraising Conference 3.5 CFRE CEUs

# Human-Centered Major Gifts: Strategy, Skill, & Ethical Courage in a High-Tech World

Tammy Zonker, CEO + Author + Major Gift Expert + Keynote Speaker



# Our Learning Objectives

- Understanding the Human-Centered approach
- Define or redefine a major gift for your organization
- Understand and apply a blended gifts approach
- Strengthen your confidence in the art of the ask
- Balance technology with humanity





**But first, let's get to know each other.**



- What's your name?
- What organization are you with?
- How long have you been fundraising?
- How long have you worked in major gifts?



# Major Gifts Development Cycle

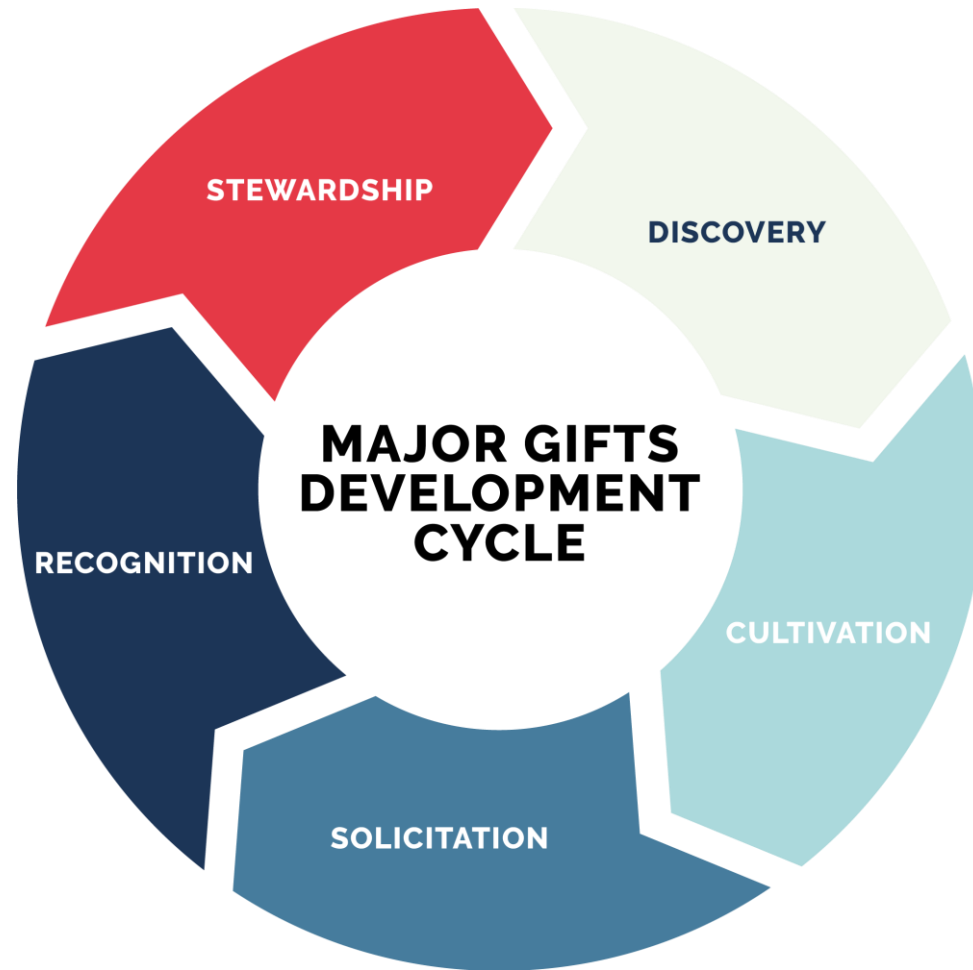
Discovery 20%

Cultivation 35%

**Solicitation 5%**

Recognition 5%

Stewardship 35%



# What Being Human-Centered Means

- People First, *not money*
- Centered in Empathy
- Equity & Inclusion
- Collaboration & Co-Creation
- Transparency
- Holistic Impact
- Continuous Learning & Iteration



# Transactional vs. Human-Centered Approach

## TRANSACTIONAL

- Donors viewed as ATMs
- The gift is the goal
- Relationship is the means to an end
- Asks come early and often
- Focus is on the organization's needs
- Generic communication
- Language: donate, fund, give

## HUMAN-CENTERED

- Donors seen as a partners
- The gift is an expression of shared values
- Relationship is the foundation
- People first, money second
- Focus on shared values and dreams
- Personalized engagement
- Language: partner, believe, together



# Being *Known* vs. Being *Understood*

## FACTUAL INFORMATION

- Demographics
- Profession
- Relationship Status
- Educational Background
- Hobbies & Leisure Preferences

## HUMAN-CONNECTION

- Shared Values
- Perception of Emotional State
- Listen Without Judgement
- Validation of Feelings
- Safe Space for Expression



**Q: How does your organization  
define a major gift?**



# Defining or Redefining a Major Gift

## **BEST PRACTICE FOR ESTABLISHING A MAJOR GIFT THRESHOLD**

- Threshold typically equals the top 5-10% of individual gifts
- A major gift should require cultivation, a personalized proposal, and stewardship
- The threshold must align with team capacity and portfolio quality

## **EXAMPLE: Top 5-10% of Individual Donor Gift Value Range**

- 90% percentile = \$5,000
- 95% percentile = \$10,000
- Your major gift threshold *likely* sits at \$5,000 to \$10,000



# Defining or Redefining a Major Gift

## COMMON THRESHOLD BENCHMARKS

- Emerging Programs: \$1,000 - \$5,000
- Growing Mid-Size Organization: \$5,000 - \$10,000
- Established Programs with MGO: \$10,000 - \$25,000
- Large University / Healthcare Systems: \$50,000 - \$100,000



# Defining or Redefining a Major Gift

## ANNUAL EVALUATION & THRESHOLD ADJUSTMENT GUIDELINES

### 1. Anchor to Data, Not Intuition

- Analyze prior 12-24 months
- Focus on top 5-10% individual gifts
- # of donors above/below threshold
- Upgrade the velocity of donors near the threshold

### 2. Validate Against Pipeline Health

- How many prospects qualify?
- Do MGOs have 80-120 qualified prospects?
- Are donors naturally moving upward?

### 3. Evaluate Internal Capacity

- MGO caseload size and balance
- Moves management cadence
- Stewardship depth and donor retention

### 4. Benchmark Thoughtfully

- Against other orgs. in similar markets
- Org. size and philanthropic maturity
- Regional wealth markets

### 5. Consider Philanthropic Climate

- Inflation and wealth shifts
- Generational giving patterns
- Emerging high-wealth liquidity events



# Defining or Redefining a Major Gift

## THRESHOLD ADJUSTMENT FRAMEWORK

### MAJOR GIFTS SCENARIO

- Gift Values Rising + Strong Pipeline
- Stagnant File + Limited Upgrades
- Overloaded Portfolios
- Significant Economic Downturn



### ACTION TO CONSIDER

Increase Threshold

Hold Threshold or Lower Slightly

Raise Threshold, Refine Tiering or Hire Staff

Hold Steady & Stewardship Focus



# Defining or Redefining a Major Gift

## TIERED MAJOR GIFT THRESHOLDS: A SLIDING SCALE APPROACH

- Leadership Annual Giving (LAG): \$\_\_\_\_\_ to \$\_\_\_\_\_
- Major Gift: \$\_\_\_\_\_ and above
- Transformational Gift: Top 1-2%

### EXAMPLE:

- Leadership Annual Giving (LAG): \$1,000 to \$4,999
- Major Gift: \$5,000 and above
- Transformational Gift: Top \$100,000



**Q: How does your organization  
define a transformational gift?**



A transformational gift is less about the dollar amount, and more about the impact of the gift on the organization - *and sometimes the donor.*



# A Major Gift vs. a Transformational Gift

## A MAJOR GIFT:

- A gift large enough to require intentional cultivation and individualized solicitation.

## A TRANSFORMATIONAL GIFT:

- A transformational gift changes the trajectory, scale, or future of the organization.



**Q: What would a transformational gift look like for your organization?**



# Understanding & Applying a Blended Gift Approach



# Understanding A Blended Gifts Approach

## DEFINING BLENDED GIFTS

A blended gift is a combination of two or more giving vehicles

## MOST COMMON HIGH-VALUE NON-CASH ASSETS IN FUNDRAISING

- Cash + Stock
- Stock + Bequest
- Donor-Advised Fund + IRA
- Charitable Gift Annuity + Cash
- IRA/RRSP QCD + Cash
- Bequests
- Life Insurance
- Cryptocurrency (*growing*)
- Conservation Easements



**“Only 2.3% of household  
wealth is held in cash.  
Stop ignoring the other 97.7%**

**Russell James, J.D., PhD., CFP**

Professor of Charitable Financial Planning at Texas Tech University



## Cash vs. Non-Cash Gifts

- Orgs. reporting cash gifts grew by 11% over 5-yrs.
- Orgs. also receiving non-cash gifts grew by 50%
- Orgs. Receiving gifts of securities grew by 66%

*Nonprofits accepting non-cash assets grow 6X faster than organizations accepting only cash gifts.*

Source: PG Calc



# Comprehensive List of Non-Cash Assets

## 1. Publicly Traded Financial Assets

- Publicly traded stock
- Appreciated securities
- Mutual Funds
- Bonds
- Treasury securities
- Stock options
- Restricted stock
- Employee stock shares
- Dividend-producing securities
- Margin accounts securities

## 2. Retirement Assets

- IRA / RRSP assets
- Tradition IRA distributions
- Qualified Charitable Distributons
- 401K / RRSP assets
- 403B / RRSP assets
- Pension residuals
- SEP IRA assets
- SIMPLE IRA assets
- Keogh plans
- Roth IRA assets / TFSA
- Retirement plan beneficiary designations



# Comprehensive List of Non-Cash Assets

## 3. Real Estate

- Primary residences
- Vacation homes
- Rental properties
- Commercial real estate
- Farmland
- Ranch land
- Timberland
- Undeveloped land
- Conservation land
- Mineral rights
- Agricultural easements
- Retained life estates

## 4. Business Interests

- Closely held stock
- Privately held business interests
- LLC interests
- Partnership interests
- S-Corp shares
- C-Corp shares
- Family business interests
- Franchise ownership interests
- Professional practice ownership interests
- ESOP shares
- Pre-IPO shares
- Business sale proceeds



# Comprehensive List of Non-Cash Assets

## 5. Life Insurance Assets

- Life insurance policy ownership
- Paid-up life insurance policies
- Universal life insurance
- Whole life insurance
- Naming a nonprofit as a policy beneficiary
- Naming a nonprofit as a contingent beneficiary

## 6. Tangible Personal Property

- Artwork
- Collectibles (*coins, stamps,, etc.*)
- Jewelry
- Antiques
- Rare books and/or manuscripts
- Historical artifacts
- Firearm collections (*where legal*)
- Luxury vehicles
- Boats
- Airplanes
- Sports memorabilia
- Furniture collections



# Comprehensive List of Non-Cash Assets

## 7. Intellectual Property

- Royalties
- Copyrights
- Patents
- Trademarks
- Licensing rights
- Book royalties
- Music royalties
- Film rights
- Software / App ownership interests

## 8. Agricultural & Natural Resources

- Livestock
- Grain inventory
- Crop inventory
- Water rights
- Oil and gas rights
- Energy royalties
- Mining rights
- Quarry interests
- Carbon credits
- Renewable energy credits



# Comprehensive List of Non-Cash Assets

## 9. Digital & Emerging Assets

- Cryptocurrency
- Bitcoin
- Ethereum
- NFTs
- Digital intellectual property
- Online business ownership
- Domain names

## 10. Planned/Deferred Gift Vehicles

- Bequests
- Charitable gift annuities
- Charitable lead trusts
- Pooled income funds
- Donor-advised fund successor designations
- Beneficiary designations
- Transfer-on-death accounts
- Payable-on-death accounts



# Comprehensive List of Non-Cash Assets

## 11. Income-Producing Assets

- Rental income streams
- Royalty streams
- Installment notes
- Promissory notes
- Notes receivable
- Annuities
- Structured settlements

## 12. Planned/Deferred Gift Vehicles

- Bequests
- Charitable gift annuities
- Charitable lead trusts
- Pooled income funds
- Donor-advised fund successor designations
- Beneficiary designations
- Transfer-on-death accounts
- Payable-on-death accounts



# Comprehensive List of Non-Cash Assets

## 13. Other Specialized Assets

- Tax credits
- Airline miles/points (restrictions apply)
- Vacation ownership shares
- Mobile home parks
- Storage facilities
- Billboard/signage assets
- Marina slips
- Equipment and machinery
- Inventory
- Agricultural equipment



# Blended Gift Asking Framework

## DECISION CHECKLIST

### Immediate Gift

- Liquidity check
- Urgency of funding
- “*See and feel the impact*”
- Tax-efficient options

**CASH NOW**

### Intermediate Gift

- Cash flow preference
- Campaign pacing
- Engagement leverage
- Age 70.5+ / IRA RRSP QCD

**5-10 YEARS**

### Legacy

- Donors’ legacy desires
- Strong asset base
- Interest in planned giving
- Sustainability alignment

**10+ YEARS**



“ 60% of the largest gifts  
to colleges included no cash.

**Russell James, J.D., PhD., CFP**

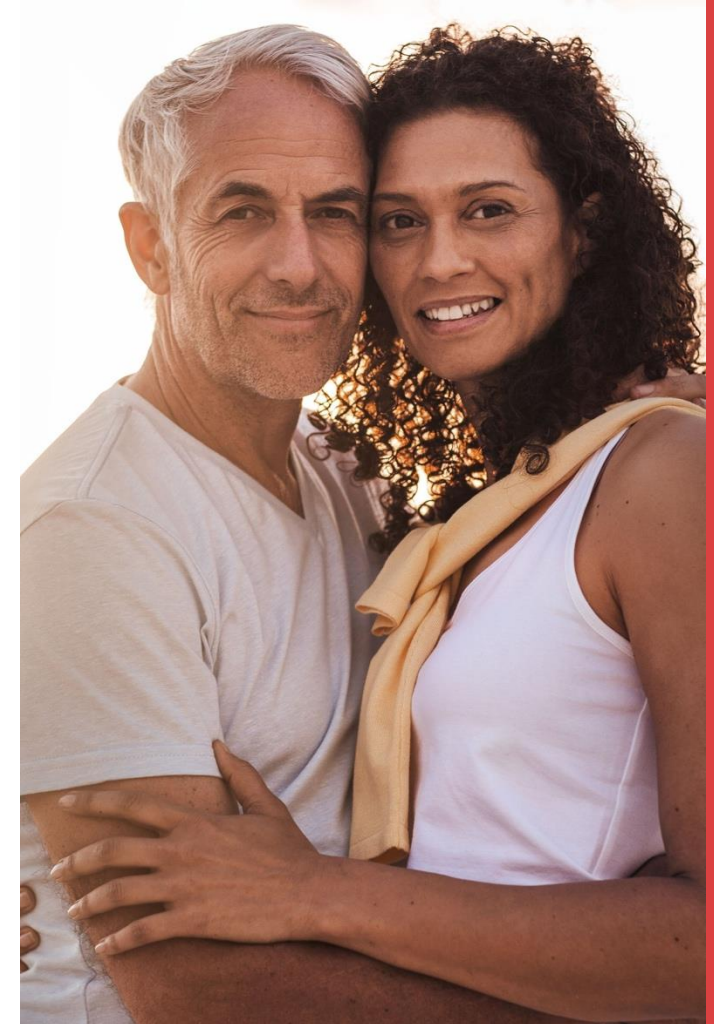
Professor of Charitable Financial Planning at Texas Tech University



# Understanding A Blended Gifts Approach

## IDENTIFYING BLENDED GIFT PROSPECTS

- High-net-worth donors with DAFs and other appreciated assets
- Loyal donors with a history of consistent giving
- Donors interested in estate planning or legacy conversations
- Donors with mandatory retirement distributions (IRA/RRSP)
- Donors eligible for charitable tax credit incentives/changes who may want creative giving solutions



## ASK EXAMPLE: Appreciated Stock

*John and Susan, given your passion for this project, I'd love to explore what a leadership commitment could look like together.*

*Many supporters are finding that a blended approach works especially well – for example, making part of the gift in cash over 3-5 years and part through appreciated securities.*

*Would you be open to a conversation about what structure might be most meaningful and tax-wise for your family?*



## ASK EXAMPLE: Major Campaign Gift + Planned Gift

*You've already made such a meaningful impact through your annual support, and as we think about the long-term vision of this campaign, I wonder if there may be an opportunity to create both an immediate and enduring legacy.*

*Some families are making a campaign commitment while also including us in their estate plans. Would it be worthwhile for us to explore a blended legacy commitment like that together?*



## **ASK EXAMPLE: Real Estate or Business Interest + Cash**

*As we've discussed your interest in making a transformational impact, I wanted to mention that some supporters are choosing to fund gifts through a combination of assets – not just cash.*

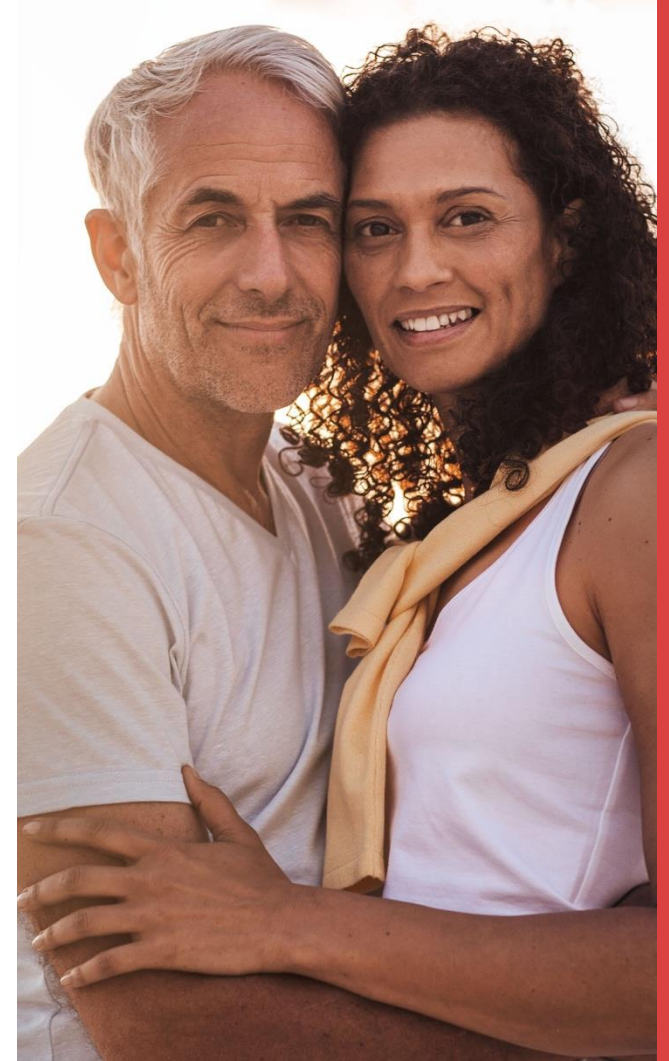
*In some cases, that includes real estate, closely held business interests, or donor-advised funds alongside a pledge commitment.*

*If you'd find it helpful, we could sit down with your advisors and explore what options might align best with your philanthropic goals.*



# Common Elements in Blended Gift Conversations

- Normalize non-cash giving (“*many supporters are...*”)
- Emphasize donor goals, not organizational needs
- Avoid sounding transactional or tax-driven
- Invite exploration instead of demanding commitment
- Include advisors early
- Focus on impact and legacy
- Create flexibility and options



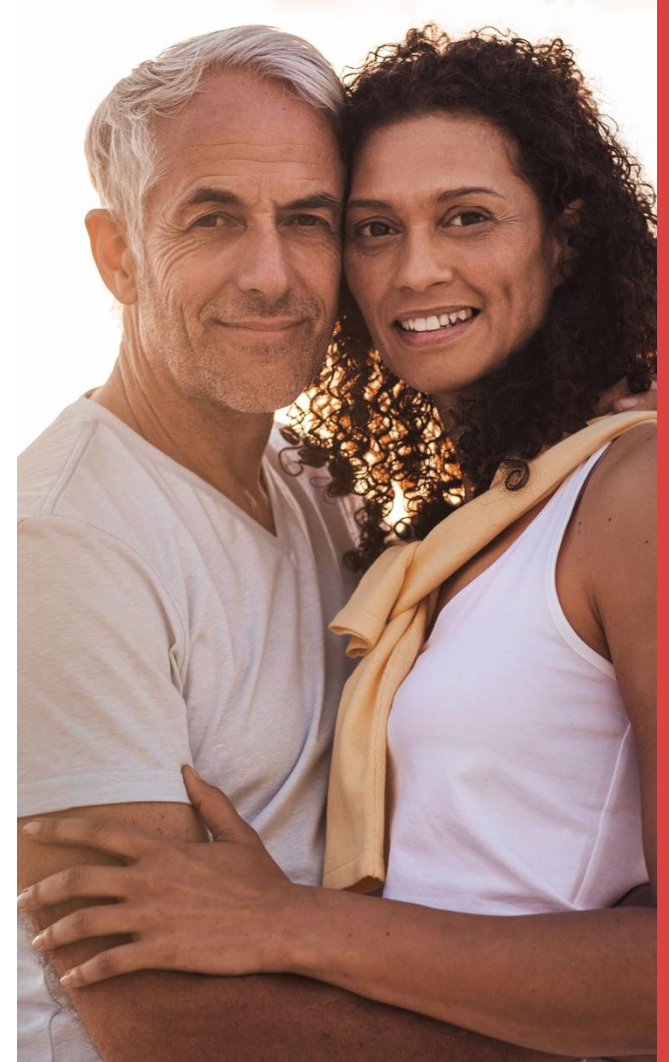
# EXERCISE



# Developing a Blended Gifts Approach

1. Review your assigned donor scenario with your table
2. Discuss and develop a blended gift opportunity  
*(with rationale)*
3. Prepare to report out and debrief with the room

*Remember: You are not a tax advisor!*



# CASE STUDY #1: Appreciated Stock Donors

## **DONOR PROFILE:**

Mark and Elena Rodriguez, both age 62, are long-time annual donors to a regional children's hospital foundation. They currently give \$15,000 annually and recently sold a portion of a tech business. Their advisor mentioned they now hold significant appreciated stock positions.

They are passionate about pediatric mental health and recently attended a campaign leadership dinner. During conversation, Elena expressed concern about "writing large checks all at once," while Mark asked thoughtful questions about tax efficiency.

**The organization is preparing to solicit a seven-figure leadership campaign commitment.**

## **DISCUSSION QUESTIONS:**

What clues suggest blended gift potential?

What assets may be appropriate?

What giving structure could work well?

What additional information would you want?

How might you introduce the blended gift conversation?



# CASE STUDY #2: The Real Estate Couple

## **DONOR PROFILE:**

Susan and David Kim, ages 74 and 76, own several commercial real estate properties that have appreciated substantially over decades.

They are deeply committed to affordable housing and have volunteered with the organization for years. They consistently say: “We’re asset rich but careful about income.” Their children are financially independent. During a cultivation visit, David mentioned: “Honestly, some of these buildings have become more of a management burden than a blessing.”

**The organization is considering a major campaign for supportive housing expansion.**

## **DISCUSSION QUESTIONS:**

What non-cash opportunities emerge here?

What donor motivations are evident?

What risks or cautions should fundraisers consider?

Which blended structure may fit best?



# CASE STUDY #3: The Mid-Level Loyal Donor

## **DONOR PROFILE:**

Angela Brooks, age 58, has faithfully donated between \$2,500 and \$5,000 annually for 22 years to an arts organization.

She recently inherited IRA assets from her mother and mentioned feeling overwhelmed by financial decisions. She has no children and often speaks emotionally about the importance of preserving arts access for future generations.

**Her giving history suggests deep loyalty but no prior major gifts.**

## **DISCUSSION QUESTIONS:**

What opportunities might fundraisers overlook?

What planned or blended gift options fit?

How would you approach this conversation sensitively?



# CASE STUDY #4: The Entrepreneurial Family

## **DONOR PROFILE:**

Priya and Arjun Patel, ages 48 and 50, own a rapidly growing manufacturing company. Their net worth is substantial but much of it is tied up in the business.

They recently made their first six-figure campaign gift to a university engineering program and expressed interest in “doing something bigger eventually.”

They are also concerned about future capital gains exposure if the company is sold.

## **DISCUSSION QUESTIONS:**

What assets or strategies might be appropriate?

What timing considerations matter?

What professional advisors should be involved?

How might campaign timing influence the conversation?



# CASE STUDY #5: The Farmer & Landowner

## **DONOR PROFILE:**

Tom Jensen, age 67, owns several hundred acres of farmland that has been in his family for generations. He lives modestly and has never made a gift larger than \$1,000, yet local leaders describe him as one of the county's largest landowners.

He is passionate about 4-H youth leadership and agricultural education. During a tour, he quietly commented: "I care more about what happens to this land after I'm gone than almost anything."

## **DISCUSSION QUESTIONS:**

What wealth indicators exist beyond annual giving?

What blended gift opportunities are present?

What emotional themes should guide the conversation?

How should stewardship differ here?



# CASE STUDY #6: Next-Gen Philanthropist

## **DONOR PROFILE:**

Jordan Lee, age 39, recently joined the board of an environmental nonprofit after receiving significant family wealth through trusts and investments.

Jordan is highly impact-oriented, tech-savvy, and interested in measurable outcomes. They actively use a donor-advised fund and cryptocurrency investments.

Jordan has said: “I want my philanthropy to feel innovative, not traditional.”

## **DISCUSSION QUESTIONS:**

How might generational preferences shape the strategy?

What blended giving vehicles could fit?

How should communication style adapt?

What stewardship expectations may differ?



# Strengthening Your Confidence In the Art of the Ask



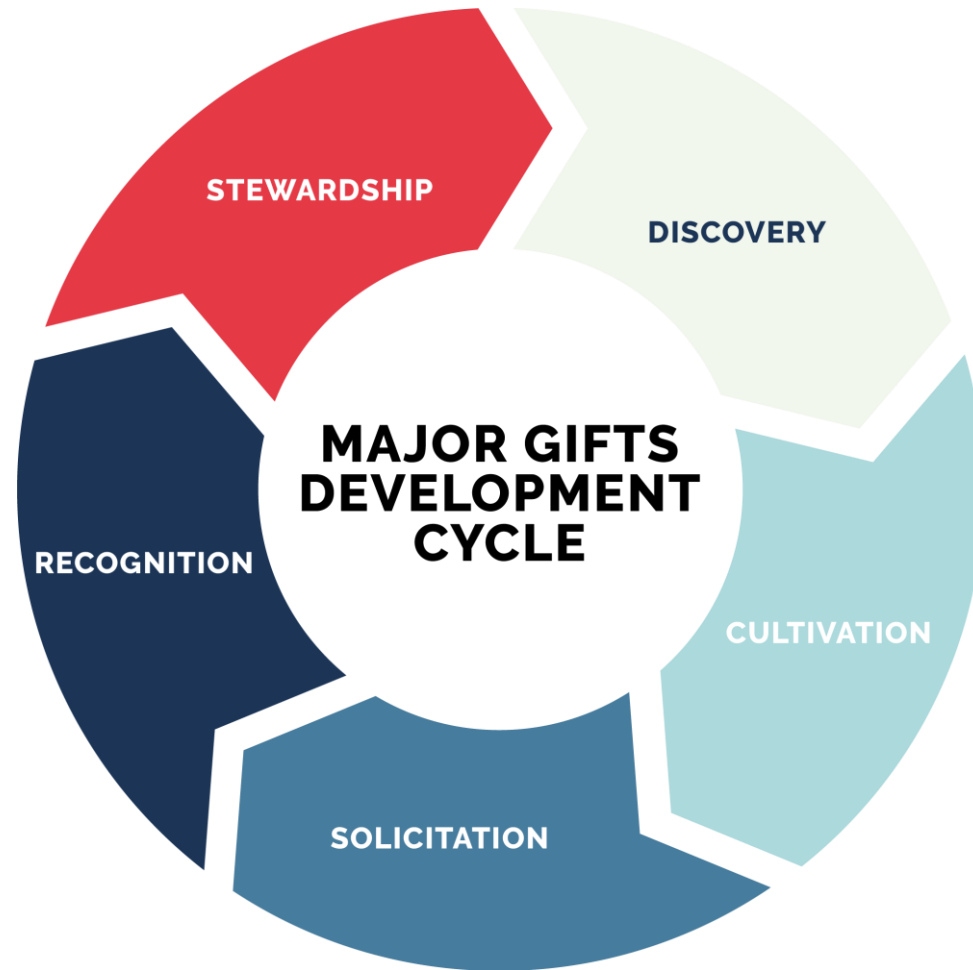
“

Major gifts are not secured by perfect words. They're secured by fundraisers who believe so deeply in the mission that they ask with clarity, courage, and confidence.



# Major Gifts Development Cycle

**Discovery 20%**  
**Cultivation 35%**  
Solicitation 5%  
Recognition 5%  
Stewardship 35%



# Discovery Questions to Explore Values & Motivation

1. What inspires you to give — not just to our organization, but in life?
2. When you think about the change you most want to see, what does it look like?
3. Who or what shaped your sense of generosity?
4. What personal experiences have influenced your giving?
5. What are the top characteristics you value in the nonprofits you support?



# Discovery Questions to Ignite Vision

1. If you could dream aloud with us, what would you want to see happen?
2. When you invest in a cause, what kind of difference do you most hope to make?
3. Five years from now, how will you know your philanthropy has been successful?
4. What's the most meaningful gift you've ever given – and why?
5. Is there a story from your giving that still gives you goosebumps?



# Discovery Questions to Deepen Connection & Belonging

1. When you think about being part of a community of supporters, what matters most to you?
2. How do you like to feel after giving – celebrated, informed, connected, inspired?
3. What do you wish nonprofits did more of to make you feel valued as a partner?
4. When have you felt the deepest sense of connection and belonging with a cause you support?
5. What's the most meaningful way you've ever been thanked for a gift?



# Discovery Questions for Collaboration & Co-Creation

1. How do you like to be involved beyond giving financially?
2. If you could help shape our future work, what would you want to influence first?
3. What's one thing we could do to make your relationship with us more meaningful?
4. If you could dream big with us, what would you want to make possible together?
5. What's one strategic insight from your work or industry that we could learn from?



# Discovery Questions to Examine Legacy

1. When you think about your legacy, what do you most want to be remembered for?
2. Do you have a vision for how you'd like to see your family continue your philanthropy?
3. If you could tell your younger self one thing about giving, what would it be?
4. Who do you hope will be inspired by your giving – and how?
5. What chapter of your life does your philanthropy represent right now?



# Major Gifts Development Cycle

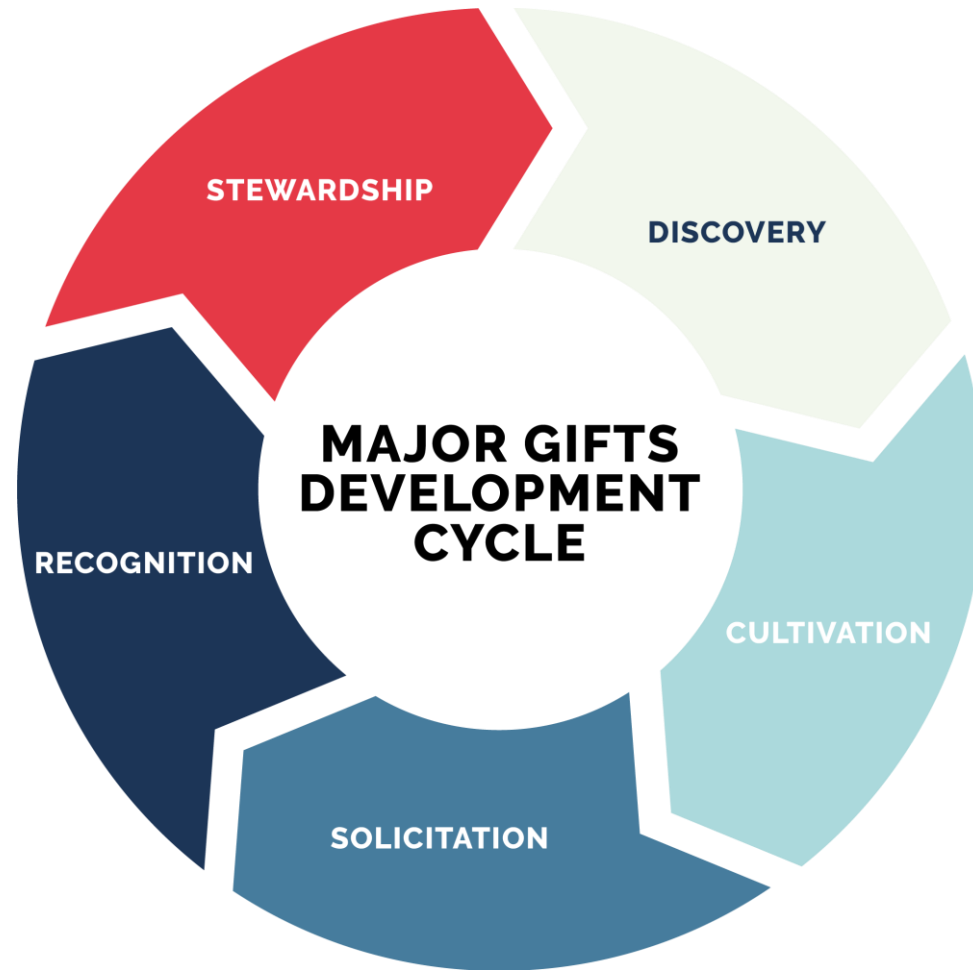
Discovery 20%

Cultivation 35%

**Solicitation 5%**

Recognition 5%

Stewardship 35%



# Making the Ask

## Gratitude and “Memory Lane” acknowledgement

- *“Preparing for our meeting today, I was reflecting on all the amazing things you’ve made possible for \_\_\_\_\_ these past several years.”*
- Great thing #1, the donor has made possible for those you serve.
- Great thing #2, the donor has made possible for those you serve.
- Great thing #3, the donor has made possible for those you serve.





## Feel Good Brain Chemicals

- **Dopamine:** The Motivation & Reward Chemical
- **Oxytocin:** The Connection & Trust Chemical
- **Serotonin:** The Mood & Significance Chemical
- **Endorphins:** The Relief & Joy Chemicals



“

Gifts by donors asked to evoke fond memories were 90% higher than others.

MICHAEL KURTZ, CHRONICLE OF PHILANTHROPY, NOVEMBER 2022



# Asking with Confidence Framework

Preparing for our visit today, I began thinking about the incredible difference you've made over the years:

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

When you think back, what have been some of your most meaningful moments with us? \_\_\_\_\_

We're here today to talk about \_\_\_\_\_

As you know *[establish the need of those served and your unique value proposition]* \_\_\_\_\_

We are *[describe your project, including intended impact, financial scope, campaign timeline, etc.]* \_\_\_\_\_

We're here today to talk about how you might want to get involved, because *[authentically acknowledge their generosity/ leadership]* \_\_\_\_\_

Would you consider a leadership level gift of \$ \_\_\_\_\_ to *[restate impact statement]*

*[Pause and wait for their response. Dialogue with them]*

To acknowledge your generosity, we would like to recognize you by *[describe and/or explore recognition at a future date]*



“  
Make the ask and then get  
comfortable with the quiet.”



# After the Ask

## If the Donors Says “Yes”

- Express sincere gratitude immediately
- Confirm the gift amount and purpose
- Clarify payment method and timing
- Ask about recognition preferences
- Outline next steps and by-when (*pledge form or gift agreement, follow-up meeting, impact updates*)

**Example Response:** *"Thank you. That means a lot! Let's talk about how you'd like the gift structured and what next steps should look like."*



# After the Ask

## If the Donors Says “No”

- Thank them for their consideration
- Ask if they're comfortable sharing **why this doesn't feel like a fit right now.**
- Listen without defensiveness
- Reaffirm appreciation for their **connection to the mission**
- Keep the door open for future engagement

**Example Response:** *"I appreciate your consideration. If I may ask, are your considerations about the ask amount, the timing, or something entirely different?"*



# After the Ask

## If the Donors Says “Maybe”

- Thank them for considering the request.
- Ask what **questions or concerns** remain.
- Identify what information would help them decide.
- Agree on a **specific follow-up step and timeline**.

**Example Response:** *"Thank you - that's encouraging.*

*What information would be most useful as you think about it?*

*When should we schedule a follow-up conversation"*



A large, stylized graphic of a butterfly in shades of red and orange, positioned on the left side of the slide. The butterfly's wings are spread, and its body is visible. The graphic is semi-transparent, allowing the background color to show through.

“

**The donor takes emotional cues from the fundraiser. If you're confident, they feel confident.**



# DEMONSTRATION





# Practivated™

Practivated™ is an AI-powered donor conversation simulator that strengthens your fundraising. Fundraisers practice in a no-pressure environment while leaders gain insights into team-wide strengths and opportunities—helping organizations build confidence, drive donor engagement, and improve fundraising outcomes.



# Balancing Technology With Humanity



The question isn't *whether* we use AI  
- it's *how* we use it.



# AI's Role in Human-Centered Major Gifts

## What Each Type of AI Does – and What Humans Still Own

### Generative AI

#### *Helps Us Prepare*

- Summarizes donor history & research
- Drafts briefs before visits
- Generates open-ended questions
- Drafts follow-up emails & proposals
- Summarizes meetings & next steps
- Creates talking points (*human-edited*)

### Predictive AI

#### *Helps Us Notice*

- Identifies upgrade-ready donors
- Flags engagement momentum or decline
- Suggests outreach timing windows
- Highlights likely donor affinities
- Surfaces lapsed or at-risk donors
- Prioritizes portfolios by readiness

### Agentic AI

#### *Helps Us Execute*

- Triggers workflows based on signals
- Creates follow-up tasks automatically
- Routes donors into journey lanes
- Initiates draft communications
- Updates CRM records consistently
- Monitors for missed follow-through

***Humans always own judgment, ethics, timing of the ask, gift amount, and relationship repair.***



# Human-Centered Major Gifts

## HIGH-TOUCH RELATIONSHIPS IN A HIGH-TECH WORLD

### WHAT FUNDRAISERS SEE

- Priority rankings
- Affinity indicators showing area of donor interest
- Alerts for opportunity or risk
- Suggested next actions

### WHAT PREDICTIVE ANALYTICS IS GOOD AT

- Prioritization and focus
- Surfacing overlooked donors
- Reducing dropped follow-ups
- Supporting consistency across teams

### WHAT PREDICTIVE ANALYTICS DOESN'T REPLACE

- Human judgement
- Empathy & emotional intelligence
- Relationship history
- Ethical decision-making

**Guiding Principle:** Predictive analytics doesn't tell us what donors will do. It helps us notice what we might otherwise miss – so we can bring better judgement to the relationship.



# Human-Centered Major Gifts

## AI'S PROPER ROLE IN MAJOR GIFTS

### AI SHOULD

- Surface insights
- Reduce friction
- Protect follow-through
- Highlight patterns

### AI SHOULD NEVER:

- Decide strategy
- Replace judgement
- Remove empathy
- Manipulate donors



“AI should *amplify* - not replace,  
authentic human relationships.

Nathan Chappell, Chief AI Officer at Virtuous  
Author Nonprofit AI & The Generosity Crisis





# FundraisingAI

## **Governance Policy for Responsible & Beneficial AI**

A free resource from Fundraising.AI to help your organization establish ethical AI guidelines.

Recommended for leadership and fundraising teams adopting AI tools.

<https://fundraising.ai/>



# Questions + answers



A Fundraising Transformed Original

# Thank You

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Excellence in Major  
Gifts 3-Day Seminar



## **Tammy Zonker** (She/Her/Nana)

President, Fundraising Transformed

President & Dean, Modern Institute for Charitable Giving

Author, Calling All Heroes

*Specializing in Major Gifts & Capital Campaigns*

*Based in the United States*

With nearly 30 years of experience as a fundraising practitioner, strategist, and recognized expert in major gift fundraising. As the Founder and President of Fundraising Transformed, President of the Modern Institute for Charitable Giving, and host of The Intentional Fundraiser Podcast, Tammy is dedicated to empowering nonprofit organizations to achieve extraordinary results.

Throughout her career, Tammy has guided and trained thousands of nonprofits to collectively raise more than a billion U.S. dollars. Among her many successes is securing an impressive single gift of \$27.1 million, highlighting her exceptional strategic insight and ability to inspire generosity.

Internationally sought after for her expertise, Tammy is an Association of Fundraising Professionals (AFP) Certified Facilitator and a seasoned global speaker, sharing her knowledge in Australia, Ireland, Canada, Italy, and the Netherlands. She serves on the Fundraising.AI Global Advisory Council and the Forbes Nonprofit Advisory Council. In 2024, the AFP Greater Detroit Chapter honored Tammy's outstanding contributions by presenting her with the prestigious Dr. John S. Lore Award for Outstanding Fundraising Executive of the Year.

