

The Power of Major Gifts - Regional Conference

Presented by the Bluegrass, Cincinnati, and Louisville AFP Chapters | Campbell House, Lexington, KY
August 21, 2026

Why this conference matters

Fundraising is, at its heart, about trust, relationships, and shared vision. When rooted in connection and clarity, fundraising becomes a powerful force for collective impact. Major and planned gifts have the potential to create lasting transformation for donors, organizations, and the communities we serve together.

This conference is designed for the full spectrum of fundraising professionals and changemakers - whether you are new to philanthropy or leading a multimillion-dollar campaign.

At a glance

THEME: Major and Planned Gifts

AUDIENCE: Fundraisers, volunteers, board members, program leaders, executives

FORMAT: Plenaries, breakout tracks, lunch, networking

HOSTED BY: AFP Bluegrass, Cincinnati, and Louisville Chapters

Learning Tracks

Foundations Track - For professionals new to development or major gifts

Momentum Track - For mid-career fundraisers building and managing donor portfolios

Mastery Track - For senior leaders shaping strategy and cultivating legacy giving

You do not have to choose only one track for the day. Move between sessions based on your learning goals.

Participants will

- Understand essential principles of cultivating and soliciting major gifts.
- Explore strategies for planned giving and legacy conversations.
- Learn practical techniques to build and manage donor portfolios effectively - with the help of ethical AI strategies.
- Strengthen leadership and strategic planning skills for major gift fundraising.
- Connect with peers and mentors to exchange best practices and expand professional networks.

How to use this digital guide: Scan the schedule, choose the sessions that fit your goals, use the speaker snapshots to get a feel for presenters, and capture your top takeaways before you leave.

Schedule at a Glance

Time	Session	Track	Location	Details / Speaker
8:00-9:00 AM	Registration, Coffee & Networking	All Attendees	Reception / Exhibit Hall	Greet colleagues, connect with peers, and prepare for the day.
9:00-9:10 AM	Welcome & Tone Setting	All Attendees	Barn	Roger Ali, AFP Global Board Chair.
9:10-10:10 AM	Opening Plenary: Curiosity Code	All Attendees	Barn	Nathan Chappell, Virtuous & Fundraising.AI
10:10-10:25 AM	Transition to Breakout Tracks	Transition		
10:25-11:25 AM	What Makes a Gift Major?	Foundations	Bluegrass Ballroom A	David Cobb & Doug Scott, Ashley Rountree & Associates
10:25-11:25 AM	Portfolio Management & Metrics That Matter	Momentum	Bluegrass Ballroom B	Ben Mohler
10:25-11:25 AM	Beyond Cash - Unlocking the Power of non-cash gifts	Mastery	Barn	Halee Cunningham
11:25-11:40 AM	Coffee & Connection Break	All Attendees	Reception / Exhibit Hall	Move to Session 2 breakouts.
11:40 AM-12:40 PM	AI Transformation in Action: A Beginner's Hands-On Case Study	Foundations	Bluegrass Ballroom A	Nathan Chappell

11:40 AM-12:40 PM	The Collaborative Donor Journey: Aligning People, Priorities, and Philanthropy	Momentum	Bluegrass Ballroom B	Joy McKee
11:40 AM-12:40 PM	Campaign Readiness & Strategy	Mastery	Barn	Roger Ali
12:40-12:45 PM	Collect box lunches and find seats	All Attendees	Barn	
12:45-1:45 PM	Lunch Plenary: Inside the Donor Mind: What Inspires Major Giving?	All Attendees	Barn	Cherian Koshy, Kindsight
1:45-2:00 PM	Transition to Breakout Tracks	Transition		
2:00-3:00 PM	From Passion to Purpose: Connecting Donor Values to Mission-Driven Giving	Foundations	Bluegrass Ballroom A	Wesley Scott
2:00-3:00 PM	Mastering Donor Conversations	Momentum	Bluegrass Ballroom B	Cherian Koshy
2:00-3:00 PM	The Future of Philanthropy & Major Giving Trends	Mastery	Barn	Ben Mohler
3:00-3:15 PM	Transition to Closing Plenary	Transition		
3:15-4:00 PM	Closing Plenary: From Transaction to Transformation: Stories of Philanthropic Impact	All Attendees	Barn	Alice Ferris

4:00-4:15 PM	Closing Remarks & Networking Reception Invitation	All Attendees	Barn	Stephen Clatos, Bluegrass Chapter President Elect
4:30-5:30 PM	Happy Hour, Networking, and Connection	All Attendees	Barn	

Choose Your Sessions by Goal

If this sounds like you...	Consider these sessions
I am new to major gifts.	What Makes a Gift Major? / From Passion to Purpose
I manage a donor portfolio.	Portfolio Management & Metrics That Matter
I need better internal collaboration.	Collaborating Across Teams for Donor Success / Leading a Culture of Philanthropy
I am curious about AI but need a starting point.	Curiosity Code / AI Transformation in Action
We are preparing for a campaign.	Campaign Readiness & Strategy
I want stronger donor conversations.	Mastery Donor Conversations / Inside the Donor Mind
I am looking ahead at sector change.	The Future of Philanthropy & Major Giving Trends
I want a reflective, mission-centered close.	From Transaction to Transformation

Session Quick Cards

All Attendees TIME: 9:10-10:10 AM ROOM: Barn SPEAKER: Nathan Chappell	Curiosity Code: Building a Culture of Curiosity to Thrive in the AI Era BEST FIT: Anyone who wants to embrace curiosity as a practical leadership skill as AI reshapes nonprofit work. YOU WILL EXPLORE: In a time of rapid technological change, the most successful nonprofit professionals will not be the ones with all the answers, but the ones who ask the best questions. Curiosity is the key to innovation, adaptability, and meaningful impact, yet too often organizations prioritize efficiency over exploration.
Foundations TIME: 10:25-11:25 AM ROOM: Bluegrass Ballroom A SPEAKER: David Cobb & Doug Scott, Ashley Rountree Gold Sponsor Session	What Makes a Gift Major? BEST FIT: Fundraisers building confidence in major gift work or defining what major gifts mean in their own organization. YOU WILL EXPLORE: What counts as a major gift depends on your organization, donor base, and fundraising goals. This foundational session helps fundraisers define, identify, and cultivate major donors in their own context.
Momentum TIME: 10:25-11:25 AM ROOM: Bluegrass Ballroom B SPEAKER: Ben Mohler Gold Sponsor Session	Portfolio Management & Metrics That Matter BEST FIT: Fundraisers actively managing donor relationships who want a more intentional, metrics-informed approach. YOU WILL EXPLORE: Successful major gift fundraising requires thoughtful portfolio strategy, clear performance goals, and disciplined use of data to focus time and energy where they can have the greatest impact.
Mastery TIME: 10:25-11:25 AM	Beyond Cash: Unlocking the Power of Non-Cash Gifts BEST FIT: Early- to mid-career fundraisers, nonprofit leaders, and board members who are beginning to work with major gifts, planned giving, campaign

ROOM: Barn SPEAKER: Halee Cunningham Gold Sponsor Session	strategy, or gift acceptance decisions. YOU WILL EXPLORE: How non-cash assets such as stock, real estate, business interests, and other appreciated assets can support more strategic charitable giving, along with the policies, processes, and professional partnerships nonprofits need to evaluate and accept these gifts responsibly.
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Foundations TIME: 11:40 AM-12:40 PM ROOM: Bluegrass Ballroom A SPEAKER: Nathan Chappell	AI Transformation in Action: A Beginner's Hands-On Case Study BEST FIT: AI beginners and nonprofit professionals looking for accessible, practical, responsible entry points. YOU WILL EXPLORE: AI can feel overwhelming when you are just getting started, but it does not have to be. This beginner-friendly session introduces the practical side of AI transformation through a guided, hands-on case study.
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Momentum TIME: 11:40 AM-12:40 PM ROOM: Bluegrass Ballroom B SPEAKER: Joy McKee	The Collaborative Donor Journey: Aligning People, Priorities, and Philanthropy BEST FIT: Mid-career fundraisers and nonprofit professionals working in growing organizations or cross-functional environments. YOU WILL EXPLORE: Strong donor relationships are rarely built by one person or one department alone. Lasting fundraising success depends on effective collaboration across development, programs, communications, leadership, and board members.
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Mastery TIME: 11:40 AM-12:40 PM ROOM: Barn SPEAKER: Roger Ali	Campaign Readiness & Strategy BEST FIT: Experienced fundraisers, executive leaders, and board-facing professionals preparing for ambitious fundraising goals. YOU WILL EXPLORE: Successful campaigns begin long before a public goal is announced. They are built through careful planning, honest assessment, strong leadership alignment, and a compelling vision that inspires confidence.
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All Attendees

TIME: 12:45-1:45 PM

ROOM: Barn

SPEAKER: Cherian Koshy

Inside the Donor Mind: What Inspires Major Giving?

BEST FIT: All career stages; anyone cultivating, soliciting, or stewarding leadership gifts and legacy donors.

YOU WILL EXPLORE: What truly motivates someone to make a major gift? Cherian Koshy, author of Neurogiving and leader at Kindsight, invites us inside the science of generosity using neuroscience, behavioral psychology, and fundraising data.

Foundations

TIME: 2:00-3:00 PM

ROOM: Bluegrass Ballroom A

SPEAKER: Wesley Scott

From Passion to Purpose: Connecting Donor Values to Mission-Driven Giving

BEST FIT: Fundraising professionals who want to build confidence and skill in donor conversations, especially when making an ask.

YOU WILL EXPLORE: Successful fundraising starts with understanding what matters most to a donor and connecting those values to meaningful impact.

Momentum

TIME: 2:00-3:00 PM

ROOM: Bluegrass Ballroom B

SPEAKER: Cherian Koshy

Mastering Donor Conversations

BEST FIT: Seasoned fundraisers and organizational leaders engaged in major and planned giving work.

YOU WILL EXPLORE: The most effective donor conversations are grounded in curiosity, shaped by emotional intelligence, and guided by a fundraiser's ability to listen closely for what matters most to the donor.

Mastery

TIME: 2:00-3:00 PM

ROOM: Barn

SPEAKER: Ben Mohler

Gold Sponsor Session

The Future of Philanthropy & Major Giving Trends

BEST FIT: Senior fundraising professionals and nonprofit leaders seeking strategic perspective on a changing philanthropic landscape.

YOU WILL EXPLORE: Philanthropy continues to evolve in response to changing donor expectations, emerging technologies, shifting public policy, and broader cultural and economic forces.

All Attendees TIME: 3:15-4:00 PM ROOM: Barn SPEAKER: Alice Ferris	From Transaction to Transformation: Stories of Philanthropic Impact BEST FIT: All attendees looking to connect the day's strategies back to human connection and mission impact. YOU WILL EXPLORE: This closing plenary brings participants back to the heart of philanthropy: human connection. Through storytelling and short case studies drawn from the day's themes, attendees will explore how meaningful donor relationships move beyond transactions to create lasting impact.
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Speaker & Presenter Snapshots

Use these brief profiles to get a feel for each presenter.

	Roger D. Ali AFP Global Board Chair Campaign Readiness & Strategy Roger D. Ali is a seasoned nonprofit professional with more than 20 years of experience as a fundraising executive, administrator, and consultant. He is a major gifts strategist with a track record of leading teams and comprehensive fundraising and marketing programs that have raised \$200 million+, including capital and endowment campaigns. His previous leadership includes President & CEO of Niagara Health Foundation, Vice President, Development at Hamilton Health Sciences Foundation, and Executive Director of Bishop Strachan School Foundation. Roger holds a Chartered Director designation in Governance from the DeGroote School of Business, McMaster University, and an MBA from Athabasca University.
	Nathan Chappell Chief AI Officer, Virtuous Opening Plenary + AI Transformation Nathan Chappell is a thought leader, public speaker, author, and AI inventor recognized globally for his expertise at the intersection of artificial intelligence and generosity. He serves as Chief AI Officer at Virtuous Software and founded Fundraising.AI, a global advocacy organization for responsible and beneficial AI in the nonprofit sector. He is author of Nonprofit AI and The Generosity Crisis and serves as an advisor for organizations including the OpenAI Users Forum, AI for Good Foundation, INCITS, and Forbes Technology Council. Nathan holds graduate degrees and certificates spanning nonprofit administration, business, artificial intelligence, economics,

philanthropic psychology, fundraising, and AI governance.



Cherian Koshy

Vice President, Kindsight | Lunch Plenary + Mastery Donor Conversations

Cherian Koshy is a globally recognized keynote speaker, strategist, and entrepreneur with more than 25 years of experience advancing fundraising, leadership, and innovation across the social impact sector. He is the author of *Neurogiving: The Science of Donor Decision-Making* and founder of NonprofitOS, now engage, an AI-powered platform acquired by Kindsight. He holds the CFRE, CAP, and ACFRE credentials and is certified in behavioral science and AI ethics. His work focuses on generosity, donor decision-making, ethical technology, and human-centered fundraising.



Alice Ferris

Founding Partner, GoalBusters Consulting | Closing Plenary

Alice L. Ferris, MBA, CFRE, ACFRE, is the founder of GoalBusters Consulting, providing comprehensive, hands-on leadership for small and mighty nonprofit teams. With 35+ years of fundraising experience across public media, rural healthcare, education, and science, Alice and the GoalBusters team help organizations develop, understand, and implement fundraising strategy and transformational change. Alice also serves as adjunct faculty in the Nonprofit Leadership Program at the University of Denver; is a member of the University of Wisconsin-Madison Communications Arts Partners Advisory Board, and is an Associate Member of Rogare, the International Fundraising Think Tank. Originally from Wisconsin, Alice now calls Flagstaff, Arizona home.



Ben Mohler

Portfolio Management + Future of Philanthropy

Ben Mohler is the chief executive and principal consultant of GivingThree and the Vice President and Senior Consultant of Trek Advancement. He is a long-time Certified Fund Raising Executive (CFRE) and earned the Advanced Certified Fundraising Executive (ACFRE) in 2015. As a consultant he specializes in fundraising innovation, board development, strategic planning, and serving as a trusted advisor to nonprofit executives. Prior to his current role he led statewide

advancement efforts for Kentucky's community college system, the state's largest post-secondary education provider.



David Cobb

David Cobb & Doug Scott

Ashley|Rountree and Associates | What Makes a Gift Major?

David Cobb, Vice President, Campaign Division

David brings over 25 years of experience guiding nonprofit organizations through capital campaigns, strategic growth, and organizational transitions. With deep roots in philanthropy and institutional advancement, David has led efforts across healthcare, education, and human services sectors, helping clients build the structure and culture needed for successful campaigns. He provides expert counsel from case testing to launch, helping organizations identify leadership donors and build internal readiness.



Doug Scott

Doug Scott, Vice President, Fundraising Solutions Division

Doug leads Ashley|Rountree's Fundraising Solutions Division, guiding organizations in major gifts strategy, donor engagement, and development infrastructure. With more than a decade of nonprofit leadership experience, Doug focuses on building relationship-centered fundraising strategies that strengthen donor pipelines and prepare organizations for transformational fundraising appeals.



Joy McKee

The Collaborative Donor Journey: Aligning People, Priorities, and Philanthropy

Joy C. Biegel McKee, MBA, ACFRE is Assistant Dean for Advancement for Boston University's College and Graduate School of Arts & Sciences, where she leads fundraising and alumni engagement efforts for the university's largest schools at the nation's 3rd largest private university. With more than 25 years of advancement experience spanning higher education, healthcare, and human services, Joy specializes in building collaborative partnerships that connect institutional priorities with donor passions and philanthropic opportunity.

Known for her ability to bring together faculty, academic leaders, volunteers, alumni, and donors around

	a shared vision, she focuses on creating strategies that enhance donor engagement, strengthen fundraising outcomes, and drive meaningful impact. Prior to Boston University, Joy served as Assistant Dean of Development for UCLA's Division of Undergraduate Education and helped advance the university's historic \$5.49 billion Centennial Campaign. Joy holds an MBA, is an Advanced Certified Fundraising Executive (ACFRE), and is a frequent speaker on philanthropy, leadership, and advancement strategy..
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	Wesley Scott From Passion to Purpose Wesley E. Scott, MPA, CFRE, has spent the better part of two decades in philanthropy, though he jokingly says he's been fundraising since 2nd grade. Wesley currently serves as the Senior Director of Major Gifts for Cross Catholic Outreach, where he leads a team of 25 philanthropy professionals serving across the US. Wesley previously held leadership roles with the Kentucky Region of the Red Cross and Shriners Children's Lexington. Wesley is a graduate of Bellarmine University, holds an MPA from the University of Kentucky Martin School of Public Policy, will one day finish his dissertation for his PhD from UK, is a CFRE, and has served as a CFRE International Ambassador since 2022. Wesley lives in Bourbon County, Kentucky, on his small, working horse farm with his wife, 3 children, and a menagerie of dogs, cats, chickens, guinea fowl, sheep, cows, and any number of random, injured animals his wife has rescued.
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	Halee C. Cunningham Bluegrass Community Foundation Working with Non-Cash Contributions Halee C. Cunningham, JD, serves as VP/Development and General Counsel for Blue Grass Community Foundation, where she works in charitable fund development, complex assets, legal compliance, donor and professional advisor services, and legacy gift management. Halee works alongside donors, nonprofits, and professional advisors to develop customized philanthropic plans that make current and after-lifetime giving easy, effective, and efficient. She earned her bachelor's degree in accounting from the University of Kentucky and her law degree from the University of Kentucky College of Law. She is a member of the Kentucky Bar Association.
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Detailed Session Guide

The following section keeps the full session detail in a more scannable format: key fit, what to expect, and learning objectives.

All Attendees TIME: 9:10-10:10 AM	Curiosity Code: Building a Culture of Curiosity to Thrive in the AI Era
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LOCATION: Barn

PRESENTER: Nathan Chappell

BEST FOR: Anyone who wants to embrace curiosity as a practical leadership skill as AI reshapes nonprofit work.

What to expect: In a time of rapid technological change, the most successful nonprofit professionals will not be the ones with all the answers, but the ones who ask the best questions. Curiosity is the key to innovation, adaptability, and meaningful impact, yet too often organizations prioritize efficiency over exploration. Nathan Chappell explores how nonprofit professionals at every level can unlock curiosity to drive innovation and deepen mission impact while ensuring AI enhances, rather than replaces, human ingenuity.

Learning objectives

- Understand how a culture of curiosity leads to better decision-making, stronger donor relationships, and more resilient organizations.
- Explore the science behind curiosity and why it fuels engagement, creativity, and personal growth.
- Consider AI as a curiosity amplifier that can enhance human ingenuity.
- Identify practical ways to cultivate curiosity in daily fundraising, campaign, and leadership work.

Foundations

TIME: 10:25-11:25 AM

LOCATION: Bluegrass Ballroom A

PRESENTER: David Cobb & Doug Scott, Ashley|Rountree

Gold Sponsor Session

What Makes a Gift Major?

BEST FOR: Fundraisers building confidence in major gift work or defining what major gifts mean in their own organization.

What to expect: What counts as a major gift depends on your organization, donor base, and fundraising goals. This foundational session helps fundraisers define, identify, and cultivate major donors in their own context. Participants will explore major gift thresholds, donor capacity and affinity, and a simple moves management approach that can help turn strong relationships into meaningful philanthropic investment.

Learning objectives

- Define what constitutes a major gift within the context of their own organization.
- Distinguish between donor capacity, affinity, and readiness, and explain how each informs major gift strategy.
- Identify the basic stages of moves management and how they support stronger donor relationships over time.
- Recognize key indicators that a donor may be ready for deeper engagement or a larger philanthropic investment.
- Apply practical next steps for building or strengthening a major gifts approach at their organization.

Momentum

TIME: 10:25-11:25 AM

LOCATION: Bluegrass Ballroom B

Portfolio Management & Metrics That Matter

BEST FOR: Fundraisers actively managing donor relationships who want a more intentional, metrics-informed approach.

PRESENTER: Ben Mohler

Gold Sponsor Session

What to expect: Successful major gift fundraising requires thoughtful portfolio strategy, clear performance goals, and disciplined use of data to focus time and energy where they can have the greatest impact. Participants will examine healthy portfolio strategy, meaningful visit and revenue goals, CRM data, progress tracking, accountability, donor personas, and practical AI tools that support more customized engagement.

Learning objectives

- Build and refine a donor portfolio using strategic criteria, including relationship stage, giving potential, and engagement history.
- Set practical visit, activity, and revenue goals that align with organizational priorities and portfolio size.
- Use data to prioritize donor outreach and focus effort where it is most likely to produce meaningful results.
- Identify key portfolio metrics that support accountability, performance management, and long-term relationship growth.
- Use CRM tools more effectively to track movement, document progress, and inform next steps.
- Explore practical applications of AI, including donor persona development, to support stronger portfolio strategy and customized engagement.

Mastery

TIME: 10:25-11:25 AM

LOCATION: Barn

PRESENTER: Halee C. Cunningham

Beyond Cash: Unlocking the Power of Non-Cash Gifts

BEST FOR: Early- to mid-career fundraisers, nonprofit leaders, and board members who are beginning to work with major gifts, planned giving, campaign strategy, or gift acceptance decisions.

What to expect: While most charitable giving is still made in cash, the vast majority of wealth in the United States is held in non-cash assets. For fundraisers, this creates both an opportunity and a responsibility: to understand how gifts of stock, real estate, business interests, and other complex assets can help donors make more strategic and meaningful philanthropic commitments. This session will introduce practical considerations for working with donors and their professional advisors to identify, structure, and accept non-cash gifts. Participants will gain a clearer understanding of common non-cash assets, how these gifts fit into donor conversations, and what nonprofits should have in place before saying yes.

Learning objectives

- Identify common types of non-cash charitable contributions, including stock, real estate, business interests, and other appreciated assets.
- Understand how non-cash gifts can support donor goals while advancing organizational fundraising priorities.
- Recognize key internal policies, processes, and professional partnerships needed to evaluate and accept non-cash gifts responsibly.

Foundations TIME: 11:40 AM-12:40 PM LOCATION: Bluegrass Ballroom A PRESENTER: Nathan Chappell	AI Transformation in Action: A Beginner's Hands-On Case Study BEST FOR: AI beginners and nonprofit professionals looking for accessible, practical, responsible entry points. What to expect: AI can feel overwhelming when you are just getting started, but it does not have to be. This beginner-friendly session introduces the practical side of AI transformation through a guided, hands-on case study. Attendees will walk through a real-world example of how AI can improve workflows, strengthen decision-making, and support organizational goals while learning where to begin, what questions to ask, and how to think strategically about responsible adoption. Learning objectives ● Define AI transformation in practical, beginner-friendly terms. ● Identify common opportunities for AI to improve organizational workflows and effectiveness. ● Apply a simple framework for evaluating where AI tools can support mission-driven work. ● Analyze a real-world case study to understand the steps, challenges, and considerations involved in AI adoption. ● Leave with actionable ideas for beginning AI exploration within their own organization.
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Momentum TIME: 11:40 AM-12:40 PM LOCATION: Bluegrass Ballroom B PRESENTER: Joy McKee	The Collaborative Donor Journey: Aligning People, Priorities, and Philanthropy BEST FOR: Mid-career fundraisers and nonprofit professionals working in growing organizations or cross-functional environments. What to expect: Strong donor relationships are rarely built by one person or one department alone. Lasting fundraising success depends on effective collaboration across development, programs, communications, leadership, and board members. Participants will explore team communication, shared goals, clear roles, engaging leadership and board members, and cross-departmental storytelling that creates a more connected, responsive, and mission-centered donor experience. Learning objectives ● Identify the roles that fundraising, programs, communications, leadership, and board members each play in supporting donor success. ● Recognize common barriers to internal collaboration and apply strategies to improve alignment and communication across teams. ● Strengthen approaches for engaging leadership and board members in relationship-building and donor engagement. ● Develop more effective ways to gather and share donor impact stories across departments. ● Build internal practices that create a more consistent, coordinated, and donor-centered experience. ● Apply practical steps for increasing cross-functional collaboration in support of stronger fundraising outcomes.
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Mastery

TIME: 11:40 AM-12:40 PM

LOCATION: Barn

PRESENTER: Roger Ali

Campaign Readiness & Strategy

BEST FOR: Experienced fundraisers, executive leaders, and board-facing professionals preparing for ambitious fundraising goals.

What to expect: Successful campaigns begin long before a public goal is announced. They are built through careful planning, honest assessment, strong leadership alignment, and a compelling vision that inspires confidence. Participants will explore campaign readiness, feasibility studies, the quiet phase, internal conditions that support campaign success, a compelling case for support, and managing board and donor expectations.

Learning objectives

- Assess key indicators of organizational readiness for a capital, comprehensive, or capacity-building campaign.
- Explain the role of feasibility studies in testing campaign potential, refining strategy, and informing leadership decisions.
- Identify the purpose and priorities of the quiet phase, including early donor engagement and momentum-building.
- Strengthen a case for support by clearly articulating need, vision, opportunity, and donor impact.
- Anticipate and manage board and donor expectations throughout campaign planning and implementation.
- Recognize common campaign readiness gaps and identify practical next steps to address them before launch.

All Attendees

TIME: 12:45-1:45 PM

LOCATION: Barn

PRESENTER: Cherian Koshy

Inside the Donor Mind: What Inspires Major Giving?

BEST FOR: All career stages; anyone cultivating, soliciting, or stewarding leadership gifts and legacy donors.

What to expect: What truly motivates someone to make a major gift? Cherian Koshy, author of Neurogiving and leader at Kindsight, invites us inside the science of generosity using neuroscience, behavioral psychology, and fundraising data. Major gifts are rarely driven by logic alone. Identity, emotion, belonging, trust, and cognitive bias all play powerful roles in philanthropic decision-making, shifting fundraising from transactional persuasion to authentic partnership.

Learning objectives

- Identify key psychological and neurological drivers of major giving, including emotion, identity alignment, social belonging, and trust.
- Explain how cognitive biases and decision-making patterns influence donor behavior and show up in real-world fundraising conversations.
- Apply research-informed insights to strengthen cultivation, solicitation, and stewardship strategies across donor segments.
- Evaluate current donor engagement approach and identify one evidence-based adjustment that increases relational depth and philanthropic commitment.

Foundations TIME: 2:00-3:00 PM LOCATION: Bluegrass Ballroom A PRESENTER: Wesley Scott	From Passion to Purpose: Connecting Donor Values to Mission-Driven Giving BEST FOR: Fundraising professionals who want to build confidence and skill in donor conversations, especially when making an ask. What to expect: Successful fundraising starts with understanding what matters most to a donor and connecting those values to meaningful impact. Participants will explore how to structure a compelling solicitation, practice donor scenarios through interactive role play, and navigate fear, hesitation, and common objections. Learning objectives ● Explain how donor values can be connected to mission-driven giving conversations. ● Structure a clear and compelling fundraising ask. ● Practice donor conversations through interactive role-playing scenarios. ● Identify and respond to common fears, objections, and points of hesitation in solicitation meetings. ● Build greater confidence in leading authentic, relationship-centered asks.
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Momentum TIME: 2:00-3:00 PM LOCATION: Bluegrass Ballroom B PRESENTER: Cherian Koshy	Mastering Donor Conversations BEST FOR: Seasoned fundraisers and organizational leaders engaged in major and planned giving work. What to expect: The most effective donor conversations are grounded in curiosity, shaped by emotional intelligence, and guided by a fundraiser's ability to listen closely for what matters most to the donor. Participants will explore giving cues in donor language, behavior, and questions; timing and readiness; complex dynamics; and practical ways to build trust, uncover motivation, and move relationships forward without rushing or oversteering. Learning objectives ● Recognize verbal and nonverbal cues that may signal donor interest, concern, hesitation, or readiness. ● Use emotionally intelligent listening skills to better understand donor motivations, priorities, and decision-making patterns. ● Assess timing and readiness for deeper cultivation, solicitation, or next-step conversations. ● Navigate complex donor dynamics with greater confidence, including ambiguity, resistance, and competing interests. ● Respond more strategically to donor language in ways that build trust and strengthen relationships. ● Apply practical techniques for guiding thoughtful, donor-centered conversations that support long-term engagement.
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Mastery	The Future of Philanthropy & Major Giving Trends
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TIME: 2:00-3:00 PM

LOCATION: Barn

PRESENTER: Ben Mohler

Gold Sponsor Session

BEST FOR: Senior fundraising professionals and nonprofit leaders seeking strategic perspective on a changing philanthropic landscape.

What to expect: Philanthropy continues to evolve in response to changing donor expectations, emerging technologies, shifting public policy, and broader cultural and economic forces. Participants will examine national trends, donor behavior, giving patterns, advocacy and public policy, AFP global government relations perspectives, regulatory developments, economic conditions, trust, transparency, and impact.

Learning objectives

- Identify major national trends influencing the future of philanthropy and major giving.
- Explain how advocacy and public policy developments can shape fundraising practice and nonprofit strategy.
- Recognize key insights from AFP global government relations perspectives that may affect the philanthropic sector.
- Assess how changes in donor expectations, economic conditions, and sector trends may influence major gift strategy.
- Evaluate opportunities and risks emerging in the evolving fundraising landscape.
- Apply forward-looking strategies to strengthen donor engagement and organizational readiness in a changing environment.

All Attendees

TIME: 3:15-4:00 PM

LOCATION: Barn

PRESENTER: Alice Ferris

From Transaction to Transformation: Stories of Philanthropic Impact

BEST FOR: All attendees looking to connect the day's strategies back to human connection and mission impact.

What to expect: This closing plenary brings participants back to the heart of philanthropy: human connection. Through storytelling and short case studies drawn from the day's themes, attendees will explore how meaningful donor relationships move beyond transactions to create lasting impact. The session grounds practical strategies in the deeper purpose of major gift work and reminds attendees that while AI can enhance efficiency and insight, it cannot replace trust, empathy, listening, and genuine relationship.

Learning objectives

- Reflect on key insights and themes from across the conference tracks.
- Recognize how meaningful donor relationships can lead to transformational philanthropic outcomes.
- Distinguish between the supportive role of tools such as AI and the irreplaceable human elements of fundraising.
- Identify next practical steps for applying conference learning to their own donor relationships and fundraising practice.
- Leave with renewed inspiration to approach major gift work with greater intentionality, empathy, and purpose.

Sponsor Spotlight - GOLD SPONSORS



You work every day to advance your mission, and securing the financial and human resources to sustain that mission is essential. Ashley|Rountree helps you build on your strengths, positioning you to meet challenges with confidence and serve your community with greater purpose.

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Central + Appalachia Kentucky's experts in local philanthropy

Blue Grass Community Foundation is where people go to give to enhance the quality of life in Central and Appalachia Kentucky. We connect charitable individuals, families, businesses, communities and nonprofit organizations with causes they care about to meet community needs and make a difference.

Mission: Our mission is to create generous, vibrant and engaged communities throughout Central and Appalachia Kentucky.

bgcf.org



Philanthropy consultants helping nonprofits build sustainable fundraising practices, develop strong leaders, and make data-driven decisions. In partnership with GivingThree LLC.

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Sponsor Spotlight - SILVER SPONSORS



BUILDING HOPE, TRANSFORMING LIVES, AND SHARING CHRIST'S LOVE THROUGH SERVICE IN APPALACHIA

At CAP, we provide food for hungry children, connect families in need to essential resources, and offer compassionate services to seniors. We transform unsafe, deteriorating houses into homes that are safe, warm, and dry. And when disaster strikes, we're ready to provide Appalachian communities with resources and support.

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Sponsor Spotlight - BRONZE SPONSORS



To Further healthcare, education and community involvement in Eastern Kentucky and Southern West Virginia through philanthropy and fundraising for Appalachian Regional Healthcare.

arh.org

My Top Takeaways

Idea / insight	Next step back at my organization