



**ELEMENTS OF SUCCESSFUL PHILANTHROPY**  
**Building a Comprehensive and Sustainable Development Program for your Organization**

*Wednesday, July 15<sup>th</sup>, 9:00AM-4:00PM & Thursday, July 16<sup>th</sup>, 9:00AM-4:00PM*

**ONLINE SEMINAR - Zoom**

Participants will be registered for the full 2-day seminar, with each day broken up into two, 3-hour sessions. Each session will include breaks on the hour and will allow for interaction between participants.

**Log-in details will be sent out via email two days before the seminars.**

**WEDNESDAY, July 15<sup>th</sup>**

**9:00AM – 12 Noon**

**Understanding the Basics**

The world of non-profit fundraising is highly competitive. With the call on donors' dollars coming from multiple organizations, with a variety of missions, it is more important than ever for non-profits to invest in building a strong development program, that allows them to be sustainable and effective in delivering their mission for the long term. The "Understanding the Basics" session of this seminar will introduce attendees to trends in philanthropy today, and to the larger development landscape. You will learn about the "Why" and the "how" of fundraising, the principles that guide the development process, and the ethics of fundraising. This segment will also take you through the development process, to give you a detailed understanding of how effective development programs are structured.

Philanthropy – The Big Picture | The Fundamentals and Guiding Principles of Fundraising  
The Development Process | Fundraising by the Rules & Ethics

**WEDNESDAY, July 15<sup>th</sup>**

**1:00PM – 4:00PM**

**Getting Your Organization "Development Ready"**

During the second segment of Day One, participants will learn about development planning, including how to put together a plan that will guide the organizations efforts. This segment will also focus on how to build a strong case for support for your organization. You will learn about effective storytelling, the components of a strong case, and will also get to explore some examples of strong cases for support. You will learn about the importance of planning in the process of case development, and about the ethical considerations in our storytelling for fundraising. Participants will have ample time at the end of this session, to ask questions.

The Development Plan | Building a Strong Case for Support | Ethical Considerations for Storytelling

**THURSDAY, July 16<sup>th</sup>**

**9:00AM – 12:00 NOON**

**Understanding Grants and Grantors**

During the first part of Day Two, we will take an in-depth look into the world of grants, foundations, and what makes a successful proposal package, arming participants with effective strategies for identifying the right foundation prospects and structuring strong and powerful grant requests with clear and



effective program/project budgets. Participants may bring with them a cover letter, and a grant request that they are working on, to share with the group, and to discuss and develop further. This session will also provide an insight into how to build corporate partnerships for your organization and its programs, and how to secure sponsorships for your events, and the difference between the two.

Understanding grants and grantors | Foundation fundraising Developing the ask – the grant proposal  
Developing a budget for the grant request Real Projects – Real Proposals

**THURSDAY, July 16<sup>th</sup>**

**1:00PM – 4:00PM**

### **Individual Giving (Annual Funds and Major Gifts) and Capital Campaigns**

The final segment of this seminar will focus on individual giving and capital campaigns. Participants will learn about how to assess institutional readiness, and about the various vehicles and markets for individual giving. Participants will also learn about the challenges and motivations for individual giving, and the concept of generational giving. The session will provide information about annual funds and digital fundraising. We will discuss how to cultivate relationships for major t fundraising. The session will end with an overview of capital campaigns.

Individual giving – Overview | The Annual Fund | Cultivating relationships for major gift fundraising  
Digital fundraising | Capital Campaigns

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## **Development Seminar 2020 Presenter Biographies**

### **ANJALI KAUL ZUTSHI, *Executive Director, Friends of the Texas Historical Commission***

Anjali Kaul Zutshi, Executive Director of the Friends of the Texas Historical Commission, and Chief Development Officer for the Texas Historical Commission, leads the fundraising efforts for the Friends in support of the Texas Historical Commission's mission of historic preservation. Anjali has over 24 years of experience in the non-profit sector, in development and fundraising, strategic planning, program development and non-profit management. She spent almost twelve years with the Trust for Public Land, a national land conservation organization based out of San Francisco, CA, building the Texas development program, coordinating several capital campaigns, and working on several municipal public funding measures. Following her tenure at TPL, Anjali ran a successful consulting business for nine years, continuing her work with land conservation organizations, as well as children and youth, and aging services non-profits, before joining the THC team in 2016. Through her work over the last 24 years, Anjali has established a successful track record – working with non-profits on building sustainability through effective management, and with funders on building partnerships for effective mission support and delivery. She is a graduate of Leadership Austin, and is a committed community volunteer, serving on the Board of Directors of the Eanes Education Foundation, and as a member of the Eanes ISD's District Leadership Team and of the Advisory Council for the Annette Strauss Institute for Civic Life at the University of Texas at Austin. Anjali is an architect by training, with a graduate degree in Community and Regional Planning from the University of Texas at Austin. She also holds a Certificate in Fund Raising Management from the Indiana University Lilly School of Philanthropy.



**ANGELA REED, *Community Partnerships Coordinator, Texas Historical Commission***

Angela Reed is the Community Partnerships Coordinator for the THC's Historic Sites Division, where she consults local Friends Groups that support the agency's 22 State Historic Sites as they navigate fundraising initiatives, board development, 501(c)3 requirements, agency Memorandum of Agreements and Fiscal Sponsorship Agreements. With more than 15 years' experience working in both the nonprofit and state government sectors, primarily with historic resources, Angela has enjoyed the opportunity to wear many hats in the development arena; because as it turns out, the humanities can always use more money. Angela's work experience includes serving as Development Manager for the Friends of THC, Grant Writer for the historic Paramount Theater and Austin Theater Alliance, Program Manager and Interim Executive Director for Preservation Austin, Historian for CCC Parks of the Historic Sites Program - Texas Parks and Wildlife, and Field Coordinator for Volunteers for Educational & Social Services. She also currently volunteers as Board Chair of the local nonprofit, Partners for Educational, Agricultural and Sustainability (PEAS) and serves on the Historic Resources Committee of the South River City Neighborhood Association. Angela holds a Master's in humanities with a focus in history from New York University, and a Bachelor's in sociology from St. Edward's University.

**KATIE CUKERBAUM, *Development Manager, Friends of the Texas Historical Commission***

Katie grew up in Dripping Springs, Texas. Since September 2017, she has worked as Development Manager for Friends of the Texas Historical Commission. Prior to joining FTHC, she worked as Executive Director of the Texas House Democratic Campaign Committee for five years, and for two years as Community Outreach Director for an Austin-area nonprofit. In her role as Development Manager with the Friends of the THC, Katie focuses on grant writing as well as on major gift fundraising, donor relations, and communications and outreach. She also is the research guru for the Friends' development office and manages all aspects of social media communications for the Friends. Katie is a board member of the Texas Democracy Foundation, the parent Board of The Texas Observer publication. Katie received her BA in anthropology from the University of Texas at Austin.

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## Workshop Registration

Registration fee for both days: \$129.00

For more information, please contact Reina Andrade at (512) 936-2189 or [Reina.Andrade@thc.texas.gov](mailto:Reina.Andrade@thc.texas.gov).