

**Dini Spheris** consultants will conduct eleven 1-hour virtual trainings (JANUARY – NOVEMBER 2024) on the schedule and subjects listed below. Attendees will be encouraged to register for all, but some may choose to attend individual sessions. At the end of the boot camp, participants who successfully completed training will be awarded a certificate of completion. Dini Spheris will provide a pre-test before the first training day and a post-test on the last training day. There will be 5 pre- and post-quiz questions a month.

**Dini Spheris** faculty bio are provided on the pages that follow.

**Tuesday, January 30, 2024 (Timeslot = 11:30am to 12:30pm)**

**Introduction to Fundraising Essentials Bootcamp**

**Faculty: Michelle Buchanan**

- Brief introduction to the agenda and objectives of the bootcamp.
- Overview of the importance of strategy and discipline in relationship building.
- Understanding the donor cycle and its components.

**Tuesday, February 27, 2024 (Timeslot = 11:30am to 12:30pm)**

**Qualifying New Prospects and Initial Outreach**

**Faculty: Jacquelyn Buss**

- Keys to finding and evaluating prospects.
- Exploring different types of outreach.
- Preparing for initial prospect outreach.
- Effective language to engage prospects.
- Overcoming common hurdles and objections.

**Tuesday, March 12, 2024 (Timeslot = 11:30am to 12:30pm)**

**Faculty: Kateri Vaclavik**

**Language that Works in Philanthropy**

- Engaging in a philanthropy word game.
- Crafting an impactful elevator pitch.
- Golden rules for successful meetings.
- Transitioning smoothly within conversations and meetings.
- Practice exercises for transitioning effectively (take-home).

**Tuesday, April 30, 2024 (Timeslot = 11:30am to 12:30pm)**

**Faculty: Mary Claire Walther**

**Developing Effective Prospect and Donor Strategies**

- Crafting written prospect and donor strategies.
- Break-out exercises to develop strategies.
- Sharing and discussing developed strategies within the group.

**Tuesday, May 28, 2024 (Timeslot = 11:30am to 12:30pm)**

**Faculty: Mary Claire Walther**

**Strengthening the Ask and Deepening Donor Understanding**

- Including gift asks in initial visits.
- Techniques to deepen donor understanding.
- Exercises on enhancing donor understanding.
- Crafting compelling partnership (ask) language.
- Identifying and practicing the most important ask.

**Tuesday, June 25, 2024 (Timeslot = 11:30am to 12:30pm)**

**Faculty: Victor Brooks**

**Managing and Prioritizing Portfolios**

- Techniques for managing a donor portfolio.
- Portfolio exercises to enhance prioritization skills.
- Take-home exercise: Masked portfolio analysis.
- Setting portfolio goals for effective fundraising.

**Tuesday, July 30, 2024 (Timeslot = 11:30am to 12:30pm)**

**Faculty: Zitlaly Valenzuela Jimenez**

**Focus on Prioritization and Effective Strategies**

- Implementing the "Two Touches" approach.
- Calendar exercises to prioritize interactions.
- Strategies for maintaining focus on critical tasks.

**Tuesday, August 27, 2024 (Timeslot = 11:30am to 12:30pm)**

**Faculty: Jacquelyn Buss**

**Emerging Trends in Philanthropy**

- Discussion on current trends in the philanthropic landscape.
- Exploring the impact of trends on fundraising work.

**Tuesday, September 24, 2024 (Timeslot = 11:30am to 12:30pm)**

**Faculty: Michelle Buchanan**

**Compelling Partnership Language and Effective Ask Techniques**

- Delving deeper into crafting compelling partnership language.
- Techniques for making impactful gift asks.
- Practical exercises to refine asking skills.

**Tuesday, October 29, 2024 (Timeslot = 11:30am to 12:30pm)**

**Faculty: Victor Brooks**

**Advancing Portfolio Management Skills**

- Advanced techniques for portfolio management.
- Interactive exercises to refine portfolio strategies.
- Group discussion and sharing of portfolio insights.

**Tuesday, November 12, 2024 (Timeslot = 11:30am to 12:30pm) Michelle**

**Tuesday, November 19, 2024 (Timeslot = 11:30am to 12:30pm)**

**Faculty: Michelle Buchanan**

**Wrap-Up and Application of Learnings**

- Recap of key learnings from the entire bootcamp.
- Application of strategies and skills learned throughout the year.
- Benefits of investing in advancement training for long-term success.
- Final thoughts and resources for ongoing growth.

**POST TEST** for Virtual Fundraising Bootcamp (participants must complete a post-test online at 1:30pm on November 19, 2024).

# DINI SPHERIS 2024 VIRTUAL FUNDRAISING BOOTCAMP

## MEET YOUR TRAINERS:



DINI SPHERIS



**VICTOR BROOKS**  
*CONSULTANT*

After spending several years working with physicians, researchers and executives in the Texas Medical Center, Victor is used to pulling big ideas out of the clouds and getting them down on paper. As a project manager at Houston Methodist Hospital, Victor helped to develop the initial plans for the hospital's \$500 million centennial campaign.

After becoming a major gifts officer, Victor helped create and lead multi-million-dollar initiatives at Baylor College of Medicine and the University of Texas Health Science Center to support patient care, medical student scholarships, research projects, clinical trials, capital needs and endowed positions. An analytical thinker and self-described fixer, Victor enjoys tackling complex situations for his clients and providing them with simple and actionable solutions. His goal is to help every organization create and utilize its own culture of philanthropy to better serve its constituents. Victor is a graduate of Rice University where he was also a member of the varsity football team. In 2020, he received the Builder's Award, which honors young alumni who have made outstanding voluntary contributions to Rice since graduation. Victor currently serves as Treasurer for the Houston Chapter of the Association of Fundraising Professionals.



**MICHELLE BUCHANAN, CFRE**  
*PRINCIPAL*

Two words come to mind to describe Michelle's counseling style – determination and results! Well actually, three words – the third is fun! While taking the work of fundraising seriously, Michelle doesn't make the work of planning, campaigning and mentoring anything but an enjoyable experience. When in a tough spot, Michelle will settle for nothing short of success

and the celebration that follows achieving a goal. Her goal is to make others better – to strengthen the skills and results of those with whom she works. Building strong, trusted relationships was one of the secrets to Michelle's success as a development professional and major gift officer. Michelle began her fundraising career at the Wesley Community Center, eventually serving at the University of Houston's main campus. Before joining Dini Spheris, Michelle was a leader among the major gift solicitors at The University of Texas M. D. Anderson Cancer Center. There, Michelle managed an annual portfolio of more than 150 individuals – many of whom she would come to regard as personal friends. At Dini Spheris, Michelle has served as team leader on numerous projects. Those projects include building a centralized philanthropy program for St. Louis' Mercy Health system, which spans four states and 32 hospitals, as well as working with Medical Center Hospital in Odessa, Texas, to create the first-ever major gift foundation. A graduate of Texas Tech University, Michelle is often heard speaking at major professional conferences in nonprofit, educational and healthcare philanthropy.



**JACQUELYN BUSS**  
*CONSULTANT*

Jacquelyn grew up volunteering in the Houston community, developing a love for giving back and serving others that continued to grow throughout her years at Texas A&M University and led to her desire to pursue a career in the nonprofit sector. Prior to joining Dini Spheris, Jacquelyn served as a development officer and Director of Development for the Glenwood

Cemetery Historic Preservation Foundation, leading its \$15 million capital campaign. This position provided Jacquelyn with extensive experience managing a capital campaign as well as in prospect strategy, grant writing, board management and case development and ignited her passion for helping organizations pursue momentous goals. As an avid reader and lover of stories, Jacquelyn enjoys partnering with organizations as they "dream big," pursuing transformational visions and crafting compelling narratives and cases for support. With a keen eye for detail, Jacquelyn appreciates how the big picture informs all aspects of a project, and in turn, how those pieces come together as a driving force, turning visions into reality. Providing tools and helping clients move towards their visions and increase their impact motivates Jacquelyn in the work she does at Dini Spheris. Jacquelyn graduated from Texas A&M University with a Bachelor of Business Administration in business honors, a minor in psychology and a Nonprofit and Social Innovation Certificate. In her spare time, Jacquelyn enjoys traveling, reading, playing golf and volunteering with Make-A-Wish as a Wish Granter.



**KATERI VACLAVIK**  
*COLLABORATING CONSULTANT*

Kateri's work is motivated by the challenges and learning opportunities that new projects and new people bring. Her experience as a Product Manager for a technology start-up allows her to conceptualize, define and synthesize complex data and ideas, and ground visions into organized projects and processes. Kateri believes that behind every great project is a team of people, which is why she believes that the human aspect of project management is the most important. Her goal is that through empathy, active listening and accessibility every client will receive the best available support, thought leadership and the experience of being the most important client of the firm. A student of human nature, behaviors, and organizational and group dynamics, these interests paired with her experience in local and national fundraising campaigns, enable Kateri to anticipate the needs of her team to better serve her clients. High-energy, broad curiosity and an easy conversational style – in English or Spanish – have helped Kateri as she mapped her journey from Houston to Manhattan, to Spain and to Dini Spheris. Kateri has a B.A. in Spanish Literature and Language from Fordham University – Lincoln Center in New York and a M.A. in International Business Management and Modern Languages from Universidad de Almería in Spain.



**ZITLALY VALENZUELA JIMINEZ**  
*CONSULTING PROJECTS MANAGER*

Love for the arts first drew Zitlaly to nonprofits, and she quickly learned that fundraising is essential to fulfilling the mission, regardless of the organization's scale. Zitlaly believes that every nonprofit is a vehicle for change. The impact of the work has a rippling effect within communities and allows for growth, diversity and transformation. Zitlaly began her fundraising career with the Houston Center for Photography where she led all aspects of contributed revenue, including grant writing, annual giving and even events. Before joining Dini Spheris, Zitlaly served as Annual Fund Manager for the Houston Symphony where she initiated new projects and fundraising opportunities, discovered inventive prospecting tactics and furthered her project management expertise. Zitlaly's arts and culture background allows her to bring a creative approach to any project she undertakes. She aims to support every client in achieving their philanthropic goals and to anticipate their needs through excellent planning and communication. Zitlaly graduated from the University of Texas at Austin with a Bachelor of Arts in art history. She is an active member of the Association of Fundraising Professionals – Greater Houston Chapter.



**MARY CLAIRE WALTHER**  
*CONSULTANT*

Mary Claire's positivity, warmth and heart for mission is only matched by her relentless commitment to help her clients achieve their goals. Since joining Dini Spheris in 2014, Mary Claire has served dozens of nonprofits throughout Texas and across the country. She is a seasoned consultant, successfully helping clients grow their annual, capital and major gift fundraising and managing campaigns with goals ranging from \$1 million to \$250 million. As a coach and counselor, Mary Claire focuses first on building a strong, confident team of volunteers and staff. Her goal is always to maximize her client's strengths, to build the right, tailored strategy for every setting, and to create an enduring partnership based in trust. Nothing brings her more joy than walking hand in hand with organizations in the midst of transformation, boldly facing challenges and celebrations alongside her clients. Mary Claire holds a Bachelor of Arts from the University of Chicago and a Nonprofit Finance Certificate from Rice University. She is an active member of the AFP Greater Houston Chapter and regularly presents at conferences throughout the United States. Mary Claire also deeply enjoys mentoring the next generation of sector leaders as a lead instructor with the University of Houston Nonprofit Leadership Alliance.



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