



# WEBINAR / SPEAKING ENGAGEMENT TOPICS

Dynamic, engaging, and  
thought-provoking sessions  
presented by Catapult's  
team of experienced  
speakers!

For a list of upcoming  
events, visit our website  
at [www.catapultfr.com](http://www.catapultfr.com)



# SECTION I: CAPITAL CAMPAIGN PRESENTATION TOPICS

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# SO YOU'RE THINKING OF PLANNING A CAPITAL CAMPAIGN? ESSENTIALS FOR SUCCESS!



Many organizations consider a Capital Campaign but don't know where to begin. This session, presented by Diane M. Carlson, Chairman of Catapult Fundraising, will discuss what to do and where to begin when planning for your Capital Campaign.

This webinar will discuss the importance of a feasibility study, setting an appropriate Campaign dollar goal, building a gift chart, and determining a Campaign timeline that will work best for your institution.

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Recently presented for the 2022 Catapult Webinar Series, AFP ICON 2021, 2020 AHP Webinar Series, 2020 Christian Leadership Alliance Outcomes Conference, and 2020 CASE District IV Conference.

# HOW A FEASIBILITY STUDY WORKS AND ITS IMPORTANCE!



Join Diane M. Carlson, Chairman of Catapult Fundraising, for this presentation focused on the KEY planning tool for a capital campaign; the Feasibility Study.

The feasibility study is the informational & educational start to a campaign and will help you determine the right campaign goal, menu, and timeline that will help you lead a successful campaign! Conducting a feasibility study will fast track your campaign, help you identify potential steering committee members, major donors, and get a sense as to how people view your organization and mission. Don't miss this session, which will provide you with important insight on how to conduct a successful study.

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Recently presented for the 2022 Catapult Fundraising webinar series.



# **SECTION II: MAJOR GIFTS PRESENTATION TOPICS**

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# MANAGING THE ASK...ESSENTIAL STEPS WHEN SOLICITING MAJOR DONORS



For more than 30 years, Diane M. Carlson, Chairman of Catapult Fundraising, has been helping her clients ask for and receive millions of dollars in support for their organizations. In this webinar, Diane walks her audience through the process of managing the “ask”, starting with prospect identification and ending with how to handle saying “thank you”.

This was one of the most helpful webinars I have attended in the longest time. Thank you so much!

**WHAT OUR  
ATTENDEES SAID**

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Recently presented for the 2022 CASE All District Conference, 2021 AFP Planet Philanthropy Conference, AFP Desert Communities Chapter, AFP Western NC, AFP San Antonio, AFP Tampa Bay, AFP KS, Topeka, AFP St. Louis, AFP WI - Upper Mississippi Valley, AFP California Capital, AFP Coastal Georgia

# MANAGING THE ASK...WHAT TO SAY



Whether you're a seasoned fundraiser or new to the profession, we've all found ourselves in situations where we're just not quite sure what to say during a donor solicitation.

- Did I make the ask too soon?
- Did I ask for too much? Too little?
- How should I have phrased the ask?
- How should I have responded to their follow-up questions?

Diane Carlson, Chairman of Catapult Fundraising, answers all these questions during her presentation and walks the audience through different scenarios that ALL development professionals encounter at some point in their careers.

Join our expert on "What to Say" to learn masterful techniques to avoid uncomfortable moments during your next donor visit.



One of the best webinars I've ever attended! The information was not "text book" and reflected real situations that come up OFTEN in major gift fundraising. I will be listening to this presentation several times...probably before every major gift meeting. Thank you, Diane!

Recently presented for the 2022 CASE IV Conference, Catapult Webinar Series, AFP Fairfield, CT

# MAJOR GIFTS - IDENTIFYING THE “YES” YOU’RE AFTER!



The first step of major gift fundraising is determining the “yes” you’re looking for!

If done correctly, major donors will be asking YOU, rather than you asking them.

Join Paul A. Dunne, CFRE, Executive Vice President of Catapult Fundraising, for this presentation packed with information you need to know about preparing for your meetings, honing in on donors’ interests, and how to get one yes to lead to more!

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Recently presented for the AFP Aloha Chapter, 2022 Texas Association of Community College Foundations Conference, 2022 CASE IV Conference, AFP Northwest Indiana, and the 2022 Catapult Fundraising webinar series



It was such a treat learning from you last week! MAHALO for your time and energy - we all really enjoyed it and learned so much.





# **SECTION III: ANNUAL GIVING PRESENTATION TOPICS**

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events, visit our website  
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# SECRETS TO A SUCCESSFUL MULTI-CHANNEL SOLICITATION EXPERIENCE



Join Anthony R. Alonso, President of Catapult, as he discusses the tools and techniques you should use to maximize communication efforts with your donors.

Cultivation is key for the long-term sustainability of your annual fund, so make the most of a multi-channel solicitation strategy that incorporates email, direct mail, phone, text, and social media solicitations!

My brain is still swirling with the amazing amount of info you shared. I found it inspirational and have so many ideas to easily put into practice right away!

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Recently presented for the 2022 Association of Lutheran Development Executives, AFP San Luis Obispo County, AFP Memphis, 2021 AFP Planet Philanthropy Conference, AFP Coastal Virginia, AFP Coastal Bend, AFP Hampton Roads, AFP Eastern Pennsylvania, AFP Rockford Area, AFP Oklahoma, AFP Bluegrass, AFP Central NY, AFP Chattanooga, AFP Silicon Valley, AFP St. Louis.

# TECHNOLOGY DOESN'T BUILD RELATIONSHIPS — YOU DO!



There's no doubt that technology plays a major role in all essential aspects of fundraising, but technology alone doesn't build relationships or yield desired revenue results.

Join Anthony R. Alonso, President of Catapult Fundraising, to learn how to use technology to enhance your solicitation process, properly steward your donors, and stay connected with your base at all times. This presentation will focus on different generations from baby boomers to gen z and how to best appeal to these groups with the use of technology.

Excellent,  
entertaining  
presentation with  
good information that  
we might not think of  
often!

Recently presented for:  
2022 AFP Bluegrass Chapter,  
2020 Central Valley Fundraising  
Conference

## WHAT OUR ATTENDEES SAID

# DEBUNKING TELEFUNDRAISING MYTHS & HOW TO EFFECTIVELY USE PHONING TODAY



Join Anthony R. Alonso, President of Catapult Fundraising, for a session that will debunk today's telefundraising myths and discuss how telephone outreach is still the most effective form of fundraising, after face-to-face visits. Combination mail/phone programs, if done correctly, will upgrade donors, bring lapsed donors back on board, and acquire non-donors at a low cost per dollar.

This session will look at current statistics and trends in fundraising and how telefundraising can be incorporated to enhance your organization's current efforts.

“ Thank you! There was a lot of great information and new ideas to implement immediately! Much appreciated, Anthony! ”

Recently presented for the 2022 AFP Global Webinar Series, AFP Memphis, AFP Central Virginia, 2021 Association of Lutheran Development Executives Webinar Series, and the 2020 CASE District III Conference.

# MID-LEVEL DONORS: KEY STRATEGIES IN STEWARDING, ENGAGING, SOLICITING AND UPGRADING



Join Shannon Brennan, Vice President of Client Development, for an in-depth discussion on fundraising best practices for your mid-level donors.

Shannon will discuss strategies and fundraising methodologies on how to best engage these prospects and move them up the giving pyramid.

Shannon will review case studies that clearly depict how isolating mid-level donors and reinforcing their importance as a pipeline for future major gifts results in an increase in all relevant key performance indicators (pledge rate, average gift and fulfillment rate).

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Recently presented for AFP Indiana, AFP Southern New Jersey, AFP WA, South Sound, AFP San Luis Obispo County, and the 2022 Catapult Webinar Series.



Thank you for an informative and energizing presentation that will boost our organizations' strategies. I personally will be sharing all the nuggets you shared with my team!

# ALL YOU NEED TO KNOW ABOUT LAPSED DONOR REACTIVATION!



It's no surprise that utilizing a multi-channel outreach strategy is key to re-engaging your lapsed donor pool, but did you know, incorporating a phone program dramatically increases fundraising revenue across ALL channels?

Join Shannon Brennan, VP of Client Development at Catapult Fundraising, for case studies and analysis on various methods of fundraising outreach and the impact they have on lapsed donor reactivation and upgraded levels of giving.

“Excellent speaker with very clear and helpful points! This presentation was great for all development professionals – excellent content and delivery.”

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Recently presented for  
the AFP Hampton Roads  
Chapter and the 2022  
Catapult Webinar Series.



# **SECTION IV: PLANNED GIVING PRESENTATION TOPICS**

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# GROWING YOUR LEGACY SOCIETY - WHY AREN'T WE ASKING?



Join Anthony R. Alonso, President of Catapult Fundraising, for this free, 60-minute presentation on soliciting planned gifts. Learn how to identify your best planned giving prospects, solicit potential donors, and close the gift over the phone. Explore methods for how to make the ask using the mass communication instruments of mail, e-mail and telephone solicitation. This webinar will also provide strategy on the selection of donors for a planned giving direct marketing campaign.



This is probably  
the **MOST USEFUL**  
workshop I have  
ever attended...and  
I've attended a  
LOT of them!

Recently presented for the 2022 Planned Giving Council of Greater Philadelphia's Planned Giving Day Conference, 2022 AFP Planet Philanthropy Conference, AFP Inland Empire, AFP Westchester, NY, AFP Piedmont, SC, AFP Greater Springfield, 2021 AFP ICON, AFP OH, Mahoning-Shenango, AFP FL First Coast, AFP Northwest Indiana, and AFP New Jersey.



# ESTABLISH, GROW OR REIGNITE PLANNED GIVING IN YOUR ORGANIZATION



Who are our best planned giving prospects?

Why should we focus on planned giving when we need cash in the door now?

Where do we even start when developing a planned giving program?

These are all questions that Jeff Grandy, M.Ed, Vice President of Client Development at Catapult Fundraising, will answer in this presentation.

Planned gifts ensure the future of your organization, so develop a thriving program TODAY that will lead to your organization's prosperity tomorrow.

“ Thank you so much!  
Your presentation was  
amazing & invaluable.  
You brought planned  
giving to life with your  
stories and examples. So  
great!

Recently presented for the 2022 CASE IV Conference, 2022 AFP Planet Philanthropy Conference, 2022 Virginia Fund Raising Institute, 2022 Philadelphia Planned Giving Day Conference, and the AFP Connecticut Chapter.

# YOUR NEXT PLANNED GIFT IS JUST A PHONE CALL AWAY!



Join Gwen Paxon, CFRE, Vice President of Client Services at Catapult Fundraising, for this free, 60-minute presentation on soliciting planned gifts.

Gwen will walk her audience through prospect selection based on loyalty factors and wealth ratings, best practices for multi-channel solicitation techniques, and how to steward your most loyal donors.

This webinar is ideal for all fundraising professionals who would like to expand their planned giving outreach.

“Gwen provided great insight on how to internally expand our planned giving efforts. There were many great takeaways to immediately implement.”

Recently presented for the AFP Memphis Chapter and the Planned Giving Council of Greater Philadelphia's 2021 Planned Giving Day Conference



# **SECTION V: GOVERNANCE PRESENTATION TOPICS**

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# MAKING THE MOST OF YOUR BOARD OF DIRECTORS



This presentation is jam packed with information you'll NEED to revitalize your board! You'll learn five key tips to implement for immediate results!

Topics discussed will include:

- Evaluating Your Board
- Getting the Board Chair to Take Control
- Just How Much Should You Tell Your Board?
- Recruiting the Right People for Your Board

Walk away with a Board Metrics Score Card & Clearly Defined Board Roles and Responsibilities.

With extensive experience partnering with organizations on board development across the country, Paul will walk you through making the most of your Board of Directors!



Paul delivers solid, practical content in a fun and engaging way!

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Recently presented for AFP FL, Polk County Chapter, AFP Miami, AFP Desert Communities, and the 2022 Catapult Fundraising Webinar Series

# THE TOOTHPASTE CHRONICLES - WHAT TO DO WHEN YOU'RE ETHICALLY SQUEEZED



- Has your CEO ever wanted you to bring in donors from your last job?
- Have you ever been asked on a date by a donor?
- What do you do when you're ethically squeezed?

Join Paul A. Dunne, CFRE, Executive Vice President of Catapult Fundraising, to get answers to these questions and learn how to navigate “sticky situations”!

## KEY TAKEAWAYS:

Learn what you can share and what you should hold tight to the vest when it comes to your organization, operations, staff and the board.

Learn the importance of financial and organizational transparency and how to avoid situations where you look like you're hiding things.

Learn how to successfully switch jobs and maintain confidentiality when it comes to information regarding donors from your previous organization

Learn what to expect from a consultant. What are ethical practices and what you should say NO to when hiring outside counsel.

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Recently presented for the AFP New Jersey Chapter



# SECTION VI: MEET THE SPEAKERS

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# DIANE M. CARLSON, CHAIRMAN



Diane is natural born leader and entrepreneur with over several decades of fundraising and nonprofit consulting experience. Diane's leadership has resulted in partnering with clients to raise several billion dollars.

Diane is sought after for her creative solutions to fundraising challenges, nonprofit strategic direction, ethical fundraising practices, and ability to lead our clients to success.

Prior to co-founding Catapult Fundraising, Diane served as the Chairman of IDC and Founder of 1-2-1 Philanthropic Solutions. She is one of a few people who have received awards from two AFP chapters, AFP New Jersey and AFP Las Vegas, for her fundraising achievement. Diane is past president of the AFP New Jersey Chapter, past board member of the AFP Global Board and Foundation Board, and the first female Chair of the American Association of Fundraising Counsel (now known at The Giving Institute).

# ANTHONY R. ALONSO, PRESIDENT



Anthony is one of the nation's leading fundraising consultants with over three decades of expertise in direct marketing and telefundraising. Anthony's out-of-the-box thinking, visionary style, and passion for success has led him to raise close to a billion dollars for his clients over the last ten years.

Prior to co-founding Catapult Fundraising, Anthony served as the Founder and President of Advantage Plus Consulting for over 20 years. He is a recipient of the AFP New Jersey Award for Consulting Excellence and has served on the boards of AFP New Jersey, The Giving Institute, Giving USA, the AFP Foundation for Philanthropy, and was a founding member of the AFP Industry Partners Council. He currently serves as president of the AFP Las Vegas Chapter.



# PAUL A. DUNNE, CFRE, EXECUTIVE VICE PRESIDENT



Paul is a well-known and respected thought leader in our industry. His passion, drive, and expert knowledge allow him to provide counsel to organizations across a variety of non-profit sectors. His expertise in the areas of capacity building with a focus on expanding revenue, strengthening fundraising infrastructure, increasing staff capacities, and board development have been invaluable to his client partners.

Prior to joining the Catapult team, Paul was the founder of thinkpadsolutions and held executive leadership roles for Howard Payne University, the Denver Rescue Mission, and North Hawaii Community Hospital.

Paul currently serves on the AFP International Foundation Board, as president of the AFP Greater Dallas chapter, and spent 7 years serving on the AFP Board. Paul was the proud recipient of the AFP Colorado Chapter Outstanding Fundraiser award.

# JEFF J. GRANDY, M.ED, VICE PRESIDENT OF CLIENT DEVELOPMENT



Jeff Grandy, M.Ed, Vice President of Client Development at Catapult Fundraising, Inc., has over 10 years of non-profit leadership experience. Jeff has hands-on experience in major gifts, planned giving, sponsorship, annual fund development, board governance, and donor stewardship. Jeff currently leads the Catapult team across the Greater Gulf Coast.

Prior to joining Catapult, Jeff held leadership positions at Vegas PBS, University of Nevada, Las Vegas, and St. Jude's Ranch for Children. He is currently an Instructor with the University of Nevada, Las Vegas Non-Profit Management and Fundraising Certificate programs teaching Donor Relations, Crafting Development Plans, and Introduction to Gift Planning. He is also a Fundraising Operations Mentor for the Center of Philanthropy and Non-Profit Leadership at Rice University. Additionally, Jeff serves as Programs Chair for the AFP Las Vegas chapter.

# GWEN PAXON, CFRE, VICE PRESIDENT OF CLIENT SERVICES



For over twenty years, Gwen has been passionately working in development on both the consulting and institutional sides. She brings a wealth of knowledge from her extensive experience to the clients she works with. Gwen's ability to identify areas of opportunity helps the programs she manages reach their maximum potential.

Gwen holds a MA in Philanthropy and Development from Saint Mary's University in Minnesota, an MBA from North Park University, and a BS in Public Health from Temple University.

Gwen served as a board member of the AFP Las Vegas Chapter for 10 years, and currently serves as president of the AFP New Jersey Chapter.

# SHANNON BRENNAN, VICE PRESIDENT OF BUSINESS DEVELOPMENT



With more than 20 years of management and executive leadership experience, Shannon Brennan serves Catapult as Vice President of Client Development.

Shannon has a demonstrated history working in the non-profit fundraising industry in a variety of roles including operations, sales, and finance, with an emphasis on team leadership, strategic planning, operational management and process improvements. Shannon's keen ability to identify challenges and quickly develop solutions has been instrumental in her success at managing client programs and business operations.

Shannon earned her Bachelor of Science degree from Arkansas State University.