



2026- 2027 TAIS Virtual Advancement Exchange

Monthly Lineup

Moderator: Dennis Ring

August 25, 2026

Guest Facilitator: Mark Dobosz, Mosaic Senior Life

Presentation: “From Transactional Fundraising to Transformational Philanthropy”

Special Offer: Donor Coach access!

Bio: *Mark J. Dobosz is a nationally recognized nonprofit executive with more than four decades of transformational leadership in philanthropy, strategic planning, and organizational development, having raised over \$100 million across healthcare, senior services, independent schools, and national associations. He currently serves as Vice President of Philanthropy at Mozaic Senior Life. Previously, he served as Executive Director of the John Knox Village Foundation (increasing philanthropic revenue by 89% in two years), President of the SCORE Foundation (growing annual revenue from \$74,000 to \$3.2 million), and Executive Director of The National Creditors Bar Association, earning the PR News 2019 Nonprofit Award and AMA finalist honors.*

Mark is the author of four books — Beyond the Ask (2025), Beyond the Culture (2026), The Art of the Invitation (2026), and Simple Man Simple Message (2019) — and a featured contributor to the Stanford Social Innovation Review (Spring 2026). He created three AI-powered philanthropic assessment tools — donorassess.org, partnerassess.net, and transactandtransform.org — grounded in donor psychology research, as well as Donor Visit Coach (ectponline.com), an AI-powered interactive coaching tool that helps fundraisers practice and refine more transformational donor visits. He holds Executive Certificates from Notre Dame's Mendoza College of Business, is a longstanding AFP member, and has received the CASE Circle of Excellence Award among other national honors.

September 15, 2026

Guest Facilitator: Brendan Schneider, SchneiderB Media

Presentation: “AI for Advancement: Prompts That Actually Work”

Bio: *Brendan Schneider is the founder and CEO of SchneiderB Media, a digital marketing agency for schools that focuses on increasing inquiries through his Fractional Digital Marketing program and his marketing automation software designed for schools called SchoolMarketingCRM. He is one of the leaders in the field of teaching and knowledge about inbound marketing for schools and the use of AI in school marketing. Brendan is also the founder of The MarCom Society, a community created exclusively for Marketing and Communication (MarCom) Professionals at schools.*

October 20, 2026

Guest Facilitator: Phil Higginson, Independent School Management

Presentation: “Parents Association and Development Office Partnership”

Bio: *Phil joined ISM as a full-time Consultant in 2023. A nationally recognized leader in philanthropic efforts and a renowned speaker, his expertise is in fundraising and development.*

Phil most recently served at Ravenscroft School in North Carolina. In over 20 years with this school, starting as the Director of Development and transitioning to the Associate Head of School for Philanthropy, he helped establish 75 new endowments equating to nearly \$14M raised in outright and deferred gifts.

Phil started his career in 1987 at Washington International School in Washington, D.C.. Since that time, he has served four additional schools.

At St. Albans School in Washington, D.C., he collaborated on a \$15 million capital campaign. At Norwood School in Maryland, he headed development programs that included another \$15 million capital campaign. He has also served at Sandy Springs Friends School and Landon School, both in Maryland.

Phil was a founding faculty member for ISM’s Advancement Academy and has served as a planning architect, instructor, and mentor for over 12 years.

Phil has presented at more than 30 local and national conferences, such as CASE, NAIS, NCAIS, AISGW, and NCPG. He served as Chair of the 38th annual CASE-NAIS national conference, served as a member of the CASE District III Board, and is a member of the CASE Laureates.

Phil earned his bachelor’s degree in political science from the University of Richmond in Virginia. He holds Leader Certification through ISM’s International Advancement Program (IAP–L).

November 17, 2026

Guest Facilitator: Russell James, Professor of Charitable Financial Planning, Texas Tech University

Presentation: “Ten Moves that Lead to Transformational Gifts: Research and Real-World Practice”

Big gifts are different. The messaging, structures, and psychology change when we move from pocket-change decisions to major life investments. In this fast-moving session, Professor James covers the key practices that reliably secure transformational gifts. Find the right audience. Walk alongside donors as a philanthropic wealth advisor (not a salesperson). Shift conversations from cash to assets. Anchor everything in donor identity and life story. And, most importantly, deliver donor joy. We'll connect neuroscience, behavioral evidence, and national data to field-tested sentences, questions, and steps you can use immediately on your next visit.

Visit <https://www.encouragegenerosity.com/> where all of Russell's books, slides, and videos are available for free.

Bio: *Russell James, J.D., Ph.D., CFP® is a University Distinguished Professor at Texas Tech University where he directs the graduate program in Charitable Financial Planning (planned giving). At the University of Missouri School of Law, he was a member of the Missouri Law Review and received the United Missouri Bank Award for Most Outstanding Work in Gift and Estate Taxation and Planning. He also holds a Ph.D. in consumer economics from the University of Missouri, where his dissertation was on charitable giving.*

He is as an Honorary Fellow of the American College of Trust and Estates Counsel (ACTEC) and a member of the National Association of Charitable Gift Planners Hall of Fame. He has been quoted in a variety of news sources including The New York Times, The Economist, and the Chronicle of Philanthropy and his financial neuroimaging research was profiled in The Wall Street Journal's Smart Money Magazine.

Prior to his career as an academic researcher, Dr. James worked as the Director of Planned Giving for Central Christian College in Moberly, Missouri for 6 years and later served as president of the college for more than 5 years. During his presidency the college successfully completed two major capital campaigns, built several new debt-free buildings, and more than tripled enrollment.

Dr. James has published research in more than 80 peer-reviewed scientific journal and law review articles, and he has authored several books on charitable planning and fundraising. All of his books, slides, and videos are available free at [EncourageGenerosity.com](https://www.EncourageGenerosity.com).

December 8, 2026

Guest Facilitator: John Gulla, E.E. Ford Foundation

Presentation: "Independent School Financial Models, Access, and the Critical Role of Philanthropy"

Bio: *John Gulla became the Executive Director of the Edward E. Ford Foundation on July 1, 2013. E. E. Ford, in its 66 years of making grants, has distributed over \$125,000,000 through over 2,300 grants to over 900 different independent schools and associations throughout the country. For the preceding 14 years, Mr. Gulla was Head of School at The Blake School and prior to that held administrative and teaching positions at Riverdale Country School in the Bronx, Isidore Newman in New Orleans and St. Ann's in Brooklyn.*

A graduate of Teachers College, Columbia University, and Amherst College, Mr. Gulla grew up the son of two public school teachers outside Boston. He helped found Fund for Teachers and has served on its Board since its inception having chaired it for many years. He also serves, or has served, on a number of other Boards including High Mountain Institute, ISACS, MAIS, Milkweed Editions, and the Minnesota chapter of the ACLU, among others. He and his wife, Andrea, have two grown sons and one new grandson, and they live in Brooklyn.

January 19, 2027

Guest Facilitator: Lynne Wester, Donor Relations Group

Presentation: "Building Connections through Donor Communications: Listening, Learning and Leading with Impact"

Bio: *For over two decades, Lynne Wester has been a dynamic force in the fundraising world, redefining how organizations think about and engage with their donors. A bold believer that donor relations is the secret sauce to fundraising success, Lynne champions the idea that the donor experience should be just as intentional and strategic as the ask itself.*

Renowned for her ability to challenge the status quo in all the right ways, Lynne steps in when organizations are facing pivotal moments — whether navigating a crisis or seizing an opportunity. Her approach? Smart strategy, authentic connection, and fearless innovation. As the founder and principal of DRG, Lynne leads a powerhouse team of experts who work with nonprofits of all sizes to transform their fundraising outcomes.

A sought-after thought leader, Lynne's insights have been featured in The Washington Post, Chronicle of Philanthropy, and CASE Currents. She's the author of four books (and a contributor to two more), and co-hosts the podcast Fundraising is Funny, alongside T. Clay Buck, CFRE.

February 16, 2027

Guest Facilitator: Jim Langley, Langley Innovations

Presentation: "Creating Conditions That Make Fundraising More Successful"

Bio: *James M. Langley, President of Langley Innovations, has pioneered a number of practices that have been emulated by hundreds of institutions of higher learning. The knowledge he acquired from conceiving and conducting three path-breaking campaigns at three major institutions and the insight he gleaned from decades of research on donor behavior has been shared in five books, dozens of articles, hundreds of blog posts and scores of seminars, workshops and speeches. As a result, his expertise and insight, particularly on how institutions can adapt best to changing and unchanging philanthropic realities, is highly sought after by Canadian and U.S. institutions and professional advancement organizations.*

His most recent book, [The Future of Fundraising: Adapting to New Philanthropic Realities](#), was published by Academic Impressions in 2020. It builds on the vast experience and extensive research imparted in his four previous books, [Comprehensive Campaigns: A Guide for Presidents and Boards](#), [Fundraising for Boards: A Guide](#), [Fundraising for Deans: A Guide](#), and [Fundraising for Presidents: A Guide](#) and [Fundraising for Presidents: A Guide](#). [Read Jim's full bio here](#).

March 9, 2027

Guest Facilitator: Penny Abrahams, Penny Abrahams Consulting

Presentation: "Moving Parent Volunteers from Energy to Impact"

Bio: *For over 20 years, Penny Abrahams has worked with independent schools in a variety of capacities: parent, trustee, administrator, and strategist. As a proud graduate of Ravenscroft School, she is a "lifer" in every sense of the word, understanding the unique ecosystem of independent schools. Penny began her independent school career as an Annual Fund Director, followed by roles as Director of Communications and Director of Admissions & Marketing. This first-hand experience in the "trenches" of school administration informs every plan she builds today. For over 15 years, she served as a consultant, workshop leader, and department head with Independent School Management (ISM). During that time, she partnered with more than 100 schools across the U.S., Canada, Latin America, and the Caribbean. Whether conducting an enrollment assessment, designing a volunteer program, or leading crisis communication planning, Penny's approach is grounded in data and global experience, but tailored to schools' specific culture.*

April 13, 2027

Guest Facilitator: Terry Curtis, Executive Director, Mobile Baldwin Athletic Partnership

Presentation: "Athletics and Athletic Administrators as a Partner to Your School's Advancement Success"

Bio: *Among the most successful high school football coaches in Alabama history, Terry Curtis has earned numerous honors, including National High School Coach of the Year recognition from the National High School Athletic Coaches Association in 2023. Coach Curtis has spent more than five decades coaching high school football, including 35 years as a head coach. During his tenure at UMS-Wright Preparatory School, he compiled a record of 278–62 with eight state championships. Across his career, he has also coached at B.C. Rain, Murphy, and Shaw high schools and has served as athletic director. In spring 2026, Curtis was named executive director of the Mobile Baldwin Athletic Partnership (MBAP).*

May 4, 2027

Guest Facilitator: Scott Butterworth, Fine Point Communications

Presentation: "Making the Summer Count: Summer Planning and Collaboration among Communications, Admissions and Development Teams"

Bio: *Scott Butterworth is principal of Fine Point Communications, a consultancy that assists independent schools and small colleges and universities with storytelling, editing, and other services.*

Scott is a former director of communications for National Cathedral School in Washington, D.C. The integrated marketing communications plan he helped create fueled substantial growth in admissions inquiries, annual giving, and social media audience, and it improved word-of-mouth marketing.

Scott came to NCS after a long tenure as an editor at The Washington Post. Fun fact: He and his teenage daughter are certified beekeepers and maintain a backyard apiary.
