

NCICU Development and PIO Virtual Conference
DEVELOPMENT AGENDA

TUESDAY, JANUARY 11, 2022

Join Zoom Meeting for Welcome and Update:

<https://ncicu.zoom.us/j/99940272764?pwd=M2R2c203NDAvbGVNO0dKa1k3UHFjQT09>

1:30 PM WELCOME AND UPDATE

Dr. A. Hope Williams, President, NCICU

SPONSOR RECOGNITION: Blackbaud, RNL, CapDev, and Crescendo

Dr. A. Hope Williams, President, NCICU

Join Zoom Meeting for Development Conference:

<https://ncicu.zoom.us/j/93096629467?pwd=MGlhMGROcm9wazR4TnM5Y0VzdHJDdz09>

2:10 PM RAISING FUNDS AMIDST PANDEMIC

Presented by: Clare Jordan and Lilly Skok Bunch, Capital Development Services

Facilitated by: John Tayloe, Assistant to the President, Executive Director of Major Gifts and Planned Giving, Chowan University

At the start of 2020, no one would have predicted that we would still be struggling with the pandemic two years later! This session will assess the lifecycle of philanthropy in the pandemic to better determine how your institutions stand for the coming year. CapDev presenters will share recent data points, then shift into your institution's philanthropic focus to capitalize on donors' perspectives for this point in the pandemic. With your participation, we will consider what donors need and want to hear from you and how you might best engage with them, sharing client examples as we go. Topics include: donor relations, major giving, and cultivation and stewardship.

3:15 PM SHIFTING THE DONOR LANDSCAPE PARADIGM: STRATEGIES TO INCREASE ENGAGEMENT AND PHILANTHROPY AMONG DONORS OF COLOR

Presented by: LaDaniel Gatling, II, Vice President for Institutional Advancement, Bennett College

Facilitated by: Jo Ellen Newsome, Executive Director of Advancement, Pfeiffer University

Throughout history, the word "philanthropy" has been used almost exclusively to describe the generous giving of large sums of money from affluent Caucasian donors. Over the last two decades, "philanthropy" has begun to widen to include a larger swath of human generosity. This new definition now encompasses contributions not just from the wealthy, but from communities of color consisting of people from every income bracket. Still, major gift fundraisers overlook donors from a variety of demographic groups, even though about 14 percent of U.S. millionaires are from minority populations. As fundraisers, we must face the reality that our practices and methodologies have been built based on the traditions of white Americans.

This session will allow participants to discuss their organization's diverse constituency landscape and how diversity, equity, and inclusion (DEI) action plans have been embedded into their current fundraising initiatives. This session will also introduce DEI strategies that could align with their fundraising plans and priorities. Participants will leave with strategies they can use to improve their individual donor engagement and the operations within their organization.

4:15 PM DAY ONE ADJOURNS

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WEDNESDAY, JANUARY 12, 2022: SESSION ONE

Join Development Conference:

<https://ncicu.zoom.us/j/93096629467?pwd=MGIhMGROcm9wazR4TnM5Y0VzdHJDdz09>

9:30 AM JOIN BREAK OUT ROOMS

You will have the opportunity to select the track you want to join.

9:45 AM SESSION 1 BEGINS

Senior Leaders: THORNY ISSUES AND BEST PRACTICES

Facilitated by Lennie Barton, Vice President of Institutional Advancement, Meredith College

An open forum discussion about what keeps you up at night.

(Vice Presidents or 1 Senior Leader per institution please)

Planned Giving: HOW THE CRESCENDO SOFTWARE HAS FOCUSED MY SUCCESS IN PLANNED GIVING

Presented by: Monica Mattioli, Director of Planned Giving from Belmont Abbey College, and Bree Daniel, Integrated Marketing from Crescendo

Facilitated by: Amy Jackson, Assistant Vice President Foundation Relations and Development, Wingate University

As a Planned Giving Director of a single staff department, I have valued using the software to build our estate planning business at Belmont Abbey College. The personal support, training opportunities, donor and financial advisor newsletters, and the personal marketing plan has helped to effectively drive our business. This presentation also includes a software demonstration that highlights some of the higher end marketing elements available.

Annual Giving: CROWDFUNDING YOUR WAY TO A BETTER DONOR EXPERIENCE

Presented by: Jenna Civitello, Director of Alumni and Constituent Giving, Emory University, Maura Langhart, Director of Annual Giving, University of Mississippi, Andy Wilson, Vice President of Advancement, Chowan University, and Brian Gawor, Vice President of Research, Ruffalo Noel Levitz

Facilitated by: Erica Burroughs, Assistant Vice President for Family Engagement and Annual Giving, High Point University

Crowdfunding is an engaging, peer-amplified and low friction giving opportunity that's transforming our donor engagement. Join three successful universities as they share their experience with crowdfunding, including establishing a platform, recruiting projects, working with volunteers and campus leaders. We'll talk about how you can use this flexible giving option for both your campaigns and to support key campus and community initiatives. And, get insights and benchmarks from a database of over \$500M in campaigns to help you plan for your program's success. Whether you're new to crowdfunding or just want to amplify your platform, this panel session will provide valuable insights and action steps to boost your success.

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SESSION TWO

10:35 AM **BREAK/JOIN BREAK OUT ROOMS**
You will have the opportunity to select the track you want to join.

10:45 AM **SESSION 2 BEGINS**

**Annual Giving/
Alumni Relations:** **IT TAKES TWO TO CREATE A SUCCESSFUL DAY OF GIVING: PARTNERSHIP
BETWEEN ANNUAL FUND AND ALUMNAE RELATIONS**

Presented by: Erin Cleghorn, director, The Meredith Fund, and Hilary Allen, director, Office of Alumnae Relations, Meredith College

Facilitated by: Jo Ellen Newsome, Executive Director of Advancement, Pfeiffer University

To date, Meredith College has held six successful Day of Giving campaigns and raised over \$2.9 million for the College. Staff members and volunteers within The Meredith Fund outline the themes, strategies, and plans for the day, but an added component is the outreach initiatives supported by staff members and volunteers from the Office of Alumnae Relations. In this session, staff members from the annual fund and alumnae relations will highlight how their two teams work together to not only reach the fundraising goal but also ensure that the College's annual Day of Giving is a fun, engaging, memory-filled day for all members of the Meredith community – faculty, staff, students, alumnae, alumni, parents, and friends.

Senior Leaders: **WHAT I WISH I HAD KNOWN AS A NEW VICE PRESIDENT FOR DEVELOPMENT**

Presented by: John Tayloe, Assistant to the President, Executive Director of Major Gifts and Planned Giving, Chowan University

Facilitated by: LaDaniel Gatling, II, Vice President for Institutional Advancement, Bennett College

Assuming the role of Vice President for Development for the first time can be overwhelming and wrought with many challenges. Hear the top list of what this seasoned professional wishes he had known starting in the position. This session would be helpful to those who desire to become a Vice President. Join with questions you have on how to navigate in the new role and have the opportunity to build a group of support.

**Prospect
Development:** **TARGETING YOUR BEST PROSPECTS**

Presented by: Jennifer Vincent, Account Executive, Blackbaud, Liz Harner, Account Executive, Blackbaud, Astra Ball, Director of Advancement Services, Meredith College, Danielle Taylor, Associate Director of Development Systems, Meredith College

Facilitated by: Amy Jackson, Assistant Vice President Foundation Relations and Development, Wingate University

These past two years have been challenging for fundraising, but one factor remains unchanged - there is often more potential within your database than you know. Join Jennifer Vincent and Liz Harner from Blackbaud alongside Astra Ball and Danielle Taylor from Meredith College as they discuss how Target Analytics can help you realize that potential and create a plan of action to quickly find your best prospects. Learn about likelihood models and how to use them to quickly identify individuals with the propensity and capacity to give more to your school. Throughout the session they will discuss organizational best practices for portfolio management and share insight into prospecting and portfolio management at Meredith College.

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SESSION THREE

11:35 AM **BREAK/JOIN BREAK OUT ROOMS**
You will have the opportunity to select the track you want to join.

11:45 AM **SESSION 3**

Alumni Relations: **MOVING THEM THROUGH THE PIPELINE | YOUNG ALUMNI CAMPAIGN COMMITMENTS**

Presented by: Scott Leighty, Assistant Director of Annual Giving, Elon University
Facilitated by: Jeff Joyce, Director of Alumni Affairs, Brevard College

Big time campaign commitment contributions often feel out of reach for young alumni causing young alumni to be disengaged from your campaign. The solution to get them engaged and committed? Campaign commitments at scale. Young alumni can make a significant impact over several years when it is laid out for them. Young alumni are used to receiving annual solicitations for participatory gifts. A campaign commitment gets them invested for the length of your campaign and perhaps most importantly puts them in the pipeline for further cultivation.

Major Gift Officers: **HOW TO BE AN “ABOVE AVERAGE” MAJOR GIFT OFFICER**
Presented by: Lennie Barton, Vice President of Institutional Advancement, Meredith College
Facilitated by: Erica Burroughs, Assistant Vice President for Family Engagement and Annual Giving, High Point University

After over 20 years of fundraising, Lennie will present observations and habits that he has observed that are detrimental to major Gift officers reaching their full potential and raising more money. From making the appointment, to presenting a proposal, to closing the gift, and stewardship for another gift, key elements for success will be discussed. This session will be helpful and beneficial to all Major Gift Officers, but also to Directors, Associate Vice Presidents, and Vice Presidents who must supervise and evaluate performance of major gift fundraising.

12:35 PM **CONFERENCE ADJOURNS**

The NCICU Development and Communications Conference is Sponsored by:



*NCICU is grateful to this year’s planning committee, for contributing their time and energy to the development of this meeting agenda: **LaDaniel Gatling II**, Bennett College; **Jeff Joyce**, Brevard College; **Peter Donlon**, Campbell University; **John M. Tayloe**, Chowan University; **Scott Leighty**, Elon University; **Erica Burroughs**, High Point University; **Lennie Barton**, Meredith College; **Jo Ellen Newsome**, Pfeiffer University; **Amy Jackson**, Wingate University*