

NCICU Development Conference Agenda
Guilford College- Founders Hall
Wednesday, January 11, 2023

Registration/Check-in: 9:00 a.m. - 9:50 a.m., Founders Hall Lobby

Upon arrival, check in and enjoy conversation with colleagues. Pastries and Coffee will be provided.

KEYNOTE SPEAKER: 10:00 a.m. – 10:50 a.m.

“CURRENT MARKET OUTLOOK: A REVIEW OF PHILANTHROPIC GIVING CHALLENGES”

Presented by: **Steve Gaskins**, CEO and Founder and **Knox Gibson**, Vice President, Seacoast Wealth Management
Facilitated by: Peter Donlon, Director of Planned Giving, Campbell University

A review of Philanthropic Giving Challenges in a volatile financial market environment. The presenters will discuss strategies to keep clients focused on the long-term view.

Location: Sternberger Auditorium

Sessions below are on a first-come, first-served basis. If a session is full, please choose a different session.

SESSION ONE: 11:00 a.m. – 11:50 a.m.

SENIOR LEADERS: “MEASURING FUNDRAISING SUCCESS”

Presented by: **Lennie Barton**, Vice President of Institutional Advancement, Meredith College
Facilitated by: Danny Gatling, Vice President for Advancement and Alumni Relations, Guilford College

Successful fundraising is really a numbers game, but what do you measure for success? One of the most difficult jobs for a supervisor who manages a major gift officer is to be consistent in what is important from year to year. How does a major gift officer spend their time? This session will explore fundraising metrics for consistent success year to year.

Location: Founders Gallery East, 2nd Floor

PLANNED GIVING: “BEST PRACTICES DISCUSSION”

Facilitated by: John Tayloe, Executive Director of Major Gifts and Planned Giving

An open forum discussion for planned giving officers to discuss current hot topics and goals.

Location: Founders Gallery West, 2nd Floor

ALUMNI RELATIONS: “ALUMNI EVENTS (POST) PANDEMIC: WHAT’S WORKING?”

Presented by:

- **Sheryl Ximines**, Director of Alumni Affairs and University Events, Saint Augustine’s University
- **Bradley Taylor**, Senior Director of Alumni Engagement, High Point University
- **Hilary Allen**, Director of Alumnae Relations, Meredith College

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Facilitated by: Scott Leighty, Assistant Dean of Development & Alumni Relations, Elon University (Moderator)

This session will be a moderated panel discussion about alumni events in the (post) pandemic world. Things have changed but some things haven't. People have changed in many ways, but in other ways they haven't. Come learn about how different institutions have adapted certain events, totally changed others, and kept some exactly the same to make the perfect event for alumni in a (post) pandemic world.

Location: Sternberger Auditorium

Lunch: 12:00 p.m. -1:00 p.m., Gilmore Room (1st Floor of Founders)

SESSION TWO: 1:15 p.m. – 2:00 p.m.

MAJOR GIFT OFFICERS: “THE ART OF THE ASK”

Presented by: **Allan Burrows**, Partner and CEO; **Lilly Skok Bunch**, Senior Counsel, and **Clare Jordan**, Vice President, Capital Development Services

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

The "ask" is more about planning than asking. Many advancement professionals either don't ask, or they don't ask in the right way. This session digs into the entire asking process, so you learn how to ask and, importantly, how to get a "yes." From setting the appointment, through the mechanics and language of the solicitation, to the follow-up after the ask, we will work on your narrative and share exercises to ready you for solicitations with positive outcomes.

Location: Founders Gallery East, 2nd Floor

PLANNED GIVING: “LEGACY GIVING WITH EASE”

Presented by: **Ellie Daniels**, Senior Partner Success Strategist, FreeWill; **Keith Friedlander**, Strategic Partnerships Lead, FreeWill; **Linda Carter**, Director of Gift Planning, Meredith College

Facilitated by: Peter Donlon, Director of Planned Giving, Campbell University

Bequests continue to be the most effective legacy gift for the majority of our donors. Meredith College and FreeWill have partnered to provide an interface that drives legacy giving by offering estate planning for alumni and friends. This session will explore the platform, effective marketing strategies, and the use of data and analytics to optimize giving.

Location: Founders Gallery West, 2nd Floor

ANNUAL GIVING AND ALUMNI RELATIONS: “PLANNING AND EXECUTING A SUCCESSFUL GIVING DAY”

Presented by:

- **LaDaniel Gatling**, Vice President for Advancement and Alumni Relations, Guilford College
- **Robin Gordon**, Director of Annual Giving, Campbell University
- **Andy Wilson**, Vice President for Advancement, Chowan University

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Facilitated by: Deborah Love, Senior Director, Alumnae Relations and Annual Giving, Bennett College

The panel will share their strategies for establishing goals and workplans, sharing successes, and sharing lessons learned from their Giving Day experiences.

Location: Sternberger Auditorium

Afternoon Beverages and Snacks: 2:00 p.m. – 2:15 p.m., Founders Hall Lobby

SESSION THREE: 2:15 p.m. – 3:00 p.m.

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*)

Location: Founders Gallery East, 2nd Floor

ADVANCEMENT SERVICES: "AT YOUR SERVICE: KEEPING YOUR DATABASE CLEAN AND AUTOMATING PROCESSES"

Presented by: **Chris Harris**, Manager, Higher Education Customer Success, Blackbaud
Austen Brown, Database Consultant, Prenger Solutions Group

Facilitated by: Kim Berry, Associate Vice President, Advancement Operations, Guilford College

Keeping your database clean is a continuous process. Join this session for a few hints and tips on where to focus your attention for maximum results and ideas on how to automate your processes. Plus, some suggestions on how to get your gift officers to use the system.

Location: Founders Gallery West, 2nd Floor

ATHLETICS ADVANCEMENT: “BEST PRACTICES OF ATHLETICS FUNDRAISING FROM TEAM FUNDRAISERS TO MAJOR GIFTS”

Facilitated by: Mindy Miller, Assistant Vice President of Development, Catawba College
Lee Aldridge, Athletics Development Coordinator, Catawba College

An open forum discussion for individuals fundraising for athletics.

Location: Sternberger Auditorium

Meeting Adjourned: 3:00 p.m.

If you do not need your nametag, please drop it off with an NCICU Staff Member. Thank you!

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BONUS: Blackbaud Networking Group, 3:00 – 3:45 p.m., Founders Gallery West, 2nd Floor

*Participants who are Blackbaud clients are invited to remain for a bonus networking session with **Chris Harris** who is the team lead for Blackbaud's Higher Education Customer Success Managers. Stay for another 30-45 minutes to mix and mingle with other Blackbaud users and hear from Chris about changes/upgrades on the horizon. He will answer questions as he is able and will take whatever feedback is offered for further follow-up.*

SPECIAL THANKS TO THE FOLLOWING:

2023 NCICU Development Conference Sponsor:



Development Planning Committee:

*Deborah Love, Bennett College
Peter Donlon, Campbell University
Mindy Miller, Catawba College
John M. Tayloe, Chowan University
Andy Wilson, Chowan University
Scott Leighty, Elon University
Kimberly Berry, Guilford College
LaDaniel Gatling II, Guilford College
Lennie Barton, Meredith College
Jo Ellen Newsome, Pfeiffer University
Carrie Clifford, Queens University of Charlotte
Amy Jackson, Wingate University*

Survey

Please take a moment to fill out the following survey, results will be shared with the development committee to assist in planning the 2024 NCICU Development Conference:

<https://www.surveymonkey.com/r/D9TBVFJ>



Wireless Internet Access:

Select GC-Guest and follow the instructions presented. Those instructions will provide you with a code to connect.