

# NOVEMBER 2-3

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# SCHEDULE OF EVENTS

## THURSDAY, NOVEMBER 2

11:30-6	<b>Registration &amp; Nonprofit Marketplace open</b>	Gallery Ballroom
12-5	<b>Nonprofit Legal Compliance Workshop</b>	Piedmont 1
2-3:15	<b>Concurrent Sessions</b>	
3:15-3:45	<b>Refreshment Break</b>	Gallery Ballroom
3:45-5	<b>Concurrent Sessions</b>	
5-6	<b>Networking Reception</b>	Gallery Ballroom

## FRIDAY, NOVEMBER 3

7:30-4	<b>Registration and Nonprofit Marketplace open</b>	Gallery Ballroom
8:30-9:30	<b>KEYNOTE: The Leadership Imperative – Exploring Team Development as a Strategy for Sustainability</b>	Gallery Ballroom
9:30-10	<b>Refreshment Break</b>	Gallery Ballroom
10-11:15	<b>Concurrent Sessions</b>	
11:15-1	<b>Networking Lunch</b>	Gallery Ballroom
1-2:15	<b>Concurrent Sessions</b>	
2:15-2:45	<b>Refreshment Break</b>	Gallery Ballroom
2:45-4	<b>Concurrent Sessions</b>	

## HEALTH AND SAFETY

Your safety and in-person comfort level during the conference is important to us. We are adhering to COVID-19 protocols and requirements set forth by the Benton Convention Center and the City of Winston-Salem.

We strongly encourage all participants to take a COVID-19 test each morning before attending the conference and stay home if you test positive. If you test positive on any day of the event, we will refund your registration fee.

Hand sanitizer will be available throughout the convention center, and we encourage those who feel more comfortable wearing a mask to do so.

Thank you for helping maintain a safe and healthy event.

# SESSION TRACKS

If you're not sure which concurrent sessions to attend, these tracks offer a suggested outline of sessions with similar topics or that apply to specific job roles. Use the icons to identify the sessions, and follow a track if it's helpful!



**Money and Management Track** – For those who manage the financial resources of your nonprofit, from raising the funds to managing their allocation, e.g. finance, fundraising, operations, compliance, risk management, executive leadership, or board members.



**Community and Communications Track** – For those who are making connections with and for the communities they serve, collaborating with other nonprofits, serving as a leader in their community's equity, diversity, and inclusion work, or developing the communications for your nonprofits' donors and supporters; e.g. programs, community engagement, executive leadership, or board members.



**People and Process Track** – For those who are internally focused on advancing their nonprofit's mission and connecting with the right people to do so, e.g. human resources, programs, leaders of your organization's equity, diversity, and inclusion work, executive leadership, or board members.

## CONTINUING EDUCATION CREDIT

**Certified Fundraising Executives International** Earn up to 8.75 points in Category 1.B – Education for initial certification or recertification.

**NC State Bar Attorneys** may earn 4 hours of CLE credit for attending the Nonprofit Legal Compliance Workshop (pending approval).

**NC State Board of CPA Examiners** CPAs may earn up to 10.5 hours of CPE credit for attending the full conference, including the Nonprofit Legal Compliance Workshop.

## CONFERENCE PRESENTERS



We're supporting sustainable practices and saving paper – learn about and read bios for our conference presenters online at [conference.ncnonprofits.org/speaker](https://conference.ncnonprofits.org/speaker).

# THURSDAY EVENTS

12pm - 5pm | PIEDMONT 1

## Nonprofit Legal Compliance Workshop

*Sponsored by Schell Bray PLLC and Langdon & Company LLP*

### PRESENTERS

**Ed Chaney**, *Partner, Schell Bray PLLC*

**David Heinen**, *Vice President for Public Policy and Advocacy, North Carolina Center for Nonprofits*



**Ed Chaney**



**David Heinen**

Charitable nonprofits are required to comply with a wide array of federal and state laws and regulations. This workshop for nonprofit staff and board members, attorneys, CPAs, and consultants, provides answers and information on many common legal issues that affect nonprofits. The first hour will offer a crash course on key legal compliance issues for nonprofits. The final hour will be a 'Q-and-non-A' where the presenters will discuss solutions to questions participants have on legal compliance issues affecting nonprofits. Breakout sessions will go into more depth on specific topics.

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# CONCURRENT SESSIONS | 2pm - 3:15pm



## Sustainable Fundraising | PIEDMONT 3

Making the shift from “annual” to regular giving means understanding that fundraising is a year-round activity. Successful nonprofits don’t wait until year-end to share their success stories and make the case that the organization is worthy of support. Learn how regular giving will help you raise more money; proven strategies for growing your list of loyal regular donors; and what’s needed to develop and implement your plan. Set aggressive, yet attainable goals—aggressive enough to make you gasp, but realistic enough to achieve ... with the right strategies. Your plan should cover all the bases: events, communications, donor recognition and appreciation, gift policies and more. Just a few of the topics to be covered include budgets, benchmarks and timelines; focusing on the mission, not the money; and the right (and wrong) ways to communicate with prospects and donors.

**PRESENTERS:** *Karin Cox, President, Kinetic; Janell Johnson, Chief Strategy Officer and Executive Vice President, Kinetic; Kevin Williamson, Associate Consultant, Kinetic*



## Advancing Diversity, Equity, and Inclusion



## Through a Hispanic/Latino Lens | PIEDMONT 2

El Centro Hispano is the largest Latino-led organization in North Carolina dedicated to building bridges, strengthening the community, and advocating for equity and inclusion. This presentation outlines the framework El Centro Hispano has adopted to ensure these crucial values permeate every level of our work, and inform the development of various tools. Audiences will explore the root causes of the disparities faced within Hispanic/Latino communities, including discrimination, limited access to resources, language barriers, and government policies, and delve into effective strategies to address these challenges. We will discuss tools organizations and individuals can use to identify and address these issues using a strength-based approach. We underscore the importance of uplifting our cultural values and traditions, embracing our cultural wisdom, and cultivating mutually intersectional collaborations. Our approach champions investing in people via education and leadership development and the collection of meaningful data to measure progress. Attendees will be encouraged to actively engage with the material through process questions designed to foster critical thinking and personal application of the concepts. Our goal is to stimulate comprehension, active learning, and make the material personally relevant to the audience. Join us to explore how El Centro Hispano leverages diversity, equity, and inclusion to create a more just society.

**PRESENTER:** *Emilia Ismael-Simental, Department Manager for Community & Civic Participation, El Centro Hispano*

## REFRESHMENT BREAK | 3:15pm - 3:45pm

*Break sponsored by DMJPS*

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# CONCURRENT SESSIONS | 3:45pm - 5pm



## The ROI of Strategic Planning: Preparing Your Team, Board and Partners for Significant Growth in Revenue and Impact in the Next 12 Months



PIEDMONT 2

Is your organization at an inflection point where you desire to create a vision for the next level of impact, dissolve internal silos, deeply engage leaders and get all of your stakeholders on the same page? The Triangle Land Conservancy and the Inter-Faith Food Shuttle took two different approaches to doing this, using a strategic planning process to ignite their teams and supporters in greatly increasing both their impact and revenue (by more than 80%!). The presenters will share these journeys and the principles you can walk away with to create the same results for your organization.

**PRESENTERS:** Teri Beckman, CEO, HIGOL; L. Ron Pringle, President & CEO, Inter-Faith Food Shuttle

*Session sponsored by Medicus IT*



## Shifting Gears as a Nonprofit Change Agent: Driving Change by Accelerating from Knowledge to Application | PIEDMONT 3



Join four members of the NC Center for Nonprofits' recent Executive Leadership Cohort: Building Equity & Anti-Racist Change Agents for a discussion about how their experience has shaped their ongoing EDI work. In small groups, modeling techniques used in the cohort and their lived experiences, they'll guide participants in discussions around power and privilege in the nonprofit sector. Undoing white supremacy culture both personally and within our organizational systems is crucial to building a culture of belonging, attracting diverse, talented employees, and, ultimately, helping to create thriving and healthy communities.

**PRESENTERS:** Heather Hu, Principal Consultant, HDH Advancement Group; Asia Washington, Membership Director, North Carolina Center for Nonprofits; Amy Lytle, Executive Director, HandsOn NWNC; Niconda Garcia, Program Consultant, WNC Nonprofit Pathways

# NETWORKING RECEPTION | 5pm - 6pm

Join in the celebration of our nonprofit sector while meeting new friends, reconnecting with colleagues, and visiting with exhibitors in the Gallery Ballroom.

Though breathtaking, the true beauty of North Carolina cannot be captured in a photo. Rather, it is seen in the diversity, determination, and unwavering passion embodied by the nonprofit sector - committed to supporting our great state and its people each and every day.



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# FRIDAY EVENTS

KEYNOTE

8:30am - 9:30am | GALLERY BALLROOM

## The Leadership Imperative: Exploring Team Development as a Strategy for Sustainability

### PRESENTER

**Donna Murray-Brown**, *Vice President of Strategy and Development, National Council of Nonprofits*



**Donna Murray-Brown**

Over the last several years, our beloved sector has experienced leadership transitions in great proportions from the “silver tsunami” in 2011 when the first round of Baby Boomers turned 65 years old, and most recently, the exodus of top leaders of all ages leaving their post during the pandemic coined as the “great resignation”. Some believe such massive transitions are detrimental to the sector while others welcome the impending change of leadership will bring. However, could our focus on the leadership transition trends be shortsighted? Explore the importance of team development and the immeasurable value of an intentional approach and philosophy toward creating a culture of leadership within your organization. Donna Murray-Brown will share her personal leadership story that led to her unrelenting approach to team development as the ultimate ingredient of organizational health and sustainability.

**REFRESHMENT BREAK | 9:30am - 10am**

*Break sponsored by DMJPS*

# CONCURRENT SESSIONS | 10am - 11:15am



## Learning from Each Other, a Conversation Between Funders and Nonprofits | PIEDMONT 1

Have you ever wondered why foundations have different focus areas, application processes, and grant cycles? Do funders collaborate on issues to increase impact on a local or state level? How are grantmaking decisions made in Foundations? Join us for an open dialogue between funders and nonprofit leaders. What do funders wish nonprofits knew? What do nonprofits wish funders understood? Collaboration hinges on understanding the needs and constraints on both sides of the equation. Let's talk frankly and honestly and explore how we can all work together to make NC an even stronger nonprofit sector.

**PRESENTERS:** *Sandra Fishel-Booth, Program Officer, Winston-Salem Foundation; Gladys Hairston, Director of Learning, Research, and Evaluation, John Rex Endowment; Kate Shirah, Executive Director, Fox Family Foundation; Adam Linker, Vice President of Programs, Kate B. Reynolds Charitable Trust; Moderator: Jeanne Allen, Jeanne Allen Consulting*

*Session sponsored by Triangle Community Foundation*



## Shaping Your Nonprofit Identity: Website Design and Branding as a Strategic Communication Tool | GAINES 2

In a digitally driven era, nonprofits must harness the power of branding and website design as pivotal elements of their communication strategy. This session will explore how cohesive branding and an effectively designed website can elevate a nonprofit's mission, enhance donor engagement, and boost visibility. We'll delve into the mechanics of website design that communicates your purpose and showcases your impact, alongside principles of branding that foster trust and create an emotional connection with your audience. As we navigate the digital landscape, this session will equip attendees with the tools to not just survive but thrive in the online world, addressing the challenges that nonprofits face today and anticipating those of tomorrow.

**PRESENTER:** *Caity Kelly, Founder & Creative Director, Carrboro Creative*



## Coaching for Career: Developing GenZ Talent Through a DEIB Lens | GAINES 1

There's a new generation entering the workforce and taking the world by storm, GenZ, also known as Digital Natives. Today GenZ accounts for 40% of global consumers and 30% of GenZ believe science and technology can solve the world's greatest problems. So how do practitioners intentionally coach GenZ for early career? First, by understanding evolving workforce and workplace dynamics, and



second by exploring GenZ's values, ideals, and preferences. This program will highlight in-demand employability skills (aligned with National Association of College & Employers standards), diversity, equity, and inclusion considerations for the future of work, and practical ways to coach diverse students for early career excellence.

**PRESENTER:** Chelsea Williams, *Founder & CEO, Reimagine Talent Co.*

*Session sponsored by Marsh McLennan Agency*

# NETWORKING LUNCH AND PANEL DISCUSSION

**11:15am - 1pm** | GALLERY BALLROOM

Following Donna Murray-Brown's keynote focusing on team development as a strategy for sustainability, the luncheon panel will explore this approach from various perspectives. We will ask how executive leadership and boards of directors can help build a culture of leadership within the organization, the role and importance of building your team, and what are some of the barriers and opportunities that emerging leaders face as the nonprofit landscape is changing.



**PRESENTERS:** **Donna Murray-Brown**, Vice President of Strategy and Development, National Council of Nonprofits; **Hunter Corn**, Director, Wildacres Leadership Initiative; **Sabrina Slade**, Director, Racial Equity and Advocacy, John Rex Endowment, and Vice Chair, Board of Directors, North Carolina Center for Nonprofits; **Moderator:** **Jeanne Canina Tedrow**, President and CEO, North Carolina Center for Nonprofits

# CONCURRENT SESSIONS | 1pm - 2:15pm



## Succession Planning: Strategies that Work



### GAINES 1

If the most active member of your team were to walk away tomorrow, would your organization come to a screeching halt or begin a chaotic scramble to figure out the next steps? Are you prepared to guide your organization through both expected and unexpected transitions of team members? If the thought of losing and replacing essential team members makes you nervous, this session is for you. Join the presenter as they outline strategies to ensure that your mission can move forward productively, even during transitions.

**PRESENTER:** **Mandy Pearce**, Owner, *Funding for Good*

*Session sponsored by Camber Foundation*

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## Ceding Power: An Honest Conversation About Centering Community Decision-Making in the Grantmaking Process | PIEDMONT 1

This panel discussion will share learnings from a collaborative, equity-focused, community-centered grantmaking process in a purpose-built community in southeast Raleigh. In 2021 the John Rex Endowment (JRE) funded the Kaleidoscope Project to partner with DHIC, a developer of affordable housing, for a place-based intervention focused on supporting children's social and emotional well-being. Rather than maintaining its traditional authority to make decisions about improvements to its properties, DHIC identified a team of residents to gather input from their neighbors and decide how to invest the Kaleidoscope Project funding in their community. With guidance from the Kaleidoscope Project and DHIC staff, the team of neighborhood "Ambassadors" chose to have a mural installed in their housing complex. The Ambassadors led the process from data collection, through creating an RFP and choosing an artist, to working with the artist on the concept for the mural. This panel presentation will include staff from the John Rex Endowment, the Kaleidoscope Project, DHIC, and a community member from the Beacon Ridge Community for an honest conversation about "turning philanthropy on its head." Panelists will share their experience participating in this innovative project that shifted decision-making power away from the Endowment to the community members impacted by its philanthropic investment.

**PRESENTERS:** *Melissa Forde, Project Director, Kaleidoscope Project; Sabrina Slade, Director, Racial Equity and Advocacy, John Rex Endowment; LaTonya Mckoy, Manager of Resident Services, DHIC; Takirah Maye, Resident Ambassador, Beacon Ridge; Charlene Reiss, Consultant, Partners for Impact*



## Nonprofits in Three-Way Partnerships with State Government and Philanthropy | GAINES 2

State government and philanthropy partnerships create significant opportunity to leverage the particular resources available to each sector. Frequently, these collaborations engage a third partner to bridge the operational aspects unique to each sector. This session explores the role nonprofits play in state government and philanthropy partnerships—as funding intermediaries, implementers, and conduits of knowledge—that help facilitate desired partnership outcomes. In this session, a panel of representatives from North Carolina state government agencies, philanthropic organizations, nonprofits, and the North Carolina Office of Strategic Partnerships will discuss state government, philanthropy, and nonprofit partnerships, the benefits and challenges of cross-sector collaboration, and best practices for navigating cross-sector relationships.

**PRESENTERS:** *Stacey Carless, Executive Director, NC Counts Coalition; Debra Farrington, Deputy Secretary/Chief Health Equity Officer, NC Department of Health and Human Services; Kimberly Kandros, Manager of Development and Special Projects, NC Department of Natural and Cultural Resources; Candice Kane, Program Officer, The Cannon Charitable Interests; Suzanne Philemon, Executive Director,*

Session sponsored by Angel Oak Creative

## REFRESHMENT BREAK | 2:15pm - 2:45pm

Break sponsored by DMJPS

# CONCURRENT SESSIONS | 2:45pm - 4pm



## The Forgotten Job of Nonprofits & Boards:



## Creating a Board Development & Recruitment Program | GAINES 1

This workshop will address the problem of having a non-existent, ambiguous or unofficial board development and recruitment plan. Many organizational leaders, both staff and volunteer, struggle with board development and recruitment. Often the struggle is with getting the board to not only take ownership of an intentional board development and recruitment process in partnership with the executive leader, but it is also getting the board to have clarity in the role that true board development plays in ensuring the success of the organization. Understanding what a truly intentional board development & recruitment program is and looks like is key in ensuring greater success for nonprofits. This workshop will help to provide a tangible framework that can be implemented by organizations with them giving the appropriate levels and methods of intentionality by organizations and their leaders, both staff and board members alike. We will outline ten steps and tactics to implementing an intentional and consistent board development and recruitment program. In addition, based on a rubric, participants will also be able to identify and learn their organization's score of board development effectiveness. This session will be very interactive as we will be conducting both large and small group activities. We will also utilize interactive software that will allow us to have live real-time data sharing and feedback from participants.

**PRESENTER:** Eddrick Martin, *Managing Partner, Elevated Momentum*

Session sponsored by Camber Foundation



## Engaging Community In Community-Based Philanthropy | PIEDMONT 1

This session will provide specific lessons from a collaborative, equity-focused program that shifted power for decision-making about community investment into the hands of those most impacted by the work. The presentation will include learnings from the Kaleidoscope Project's partnership with DHIC to implement a

place-based intervention focused on supporting children’s social and emotional well-being in a purpose-built community. The presenters will share actions taken to authentically engage with residents of the community. Honoring the voice of community members required DHIC, the Kaleidoscope Project, and their funder, the John Rex Endowment (JRE), to step back and cede control over the process. The organizational players committed to following the lead of a team of residents as they collected input from their neighbors, decided how JRE’s money would be used, and hired an artist to create a mural for their housing community. This presentation will include concrete examples that illustrate how funders and nonprofits can go beyond theory and training to meaningful implementation of equity principles in their programming. What does it mean to “move at the speed of trust” or “embrace uncertainty” or shift from “transactional to relational” when working with communities? Presenters will share the successes and challenges, the ways they pushed systems to change, experiences of the system pushing back, and the role of evaluation and ongoing reflection in creating an equitable process and outcomes.

**PRESENTERS:** *Melissa Forde, Project Director, Kaleidoscope Project; Stan Holt, Co-Owner and Senior Advisor, Partners for Impact; Charlene Reiss, Consultant, Partners for Impact*

*Session sponsored by Mutual of America*



## Strings Attached: Tips for Success in Managing Public Funds | GAINES 2

Accessing public funding is a way for nonprofits to attain much-needed resources to level up impact, but government grants are known to come with “strings attached.” This session is intended to demystify compliance requirements and provide tips for success in managing public funds. Participants of this session will better understand and be prepared to meet compliance requirements associated with federal, state and local government grants. Participants will take home a public funding readiness checklist, including topics such as finance & budgeting, insurance, internal controls, personnel, recordkeeping, inventory management, reporting, monitoring and audits. Presenters will highlight common pitfalls and share real world examples of both successful and unsuccessful management of public funds.

**PRESENTERS:** *Rachael Sawyer Nygaard, Strategic Partnerships Director, Buncombe County; Sara Joss, Grants Manager, Buncombe County*

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To the foundations, businesses, and individuals who generously support the Center's capacity building programs and services for our state's nonprofit organizations. See our Sustainers and Donors: [ncnonprofits.org/people/sustainers](https://ncnonprofits.org/people/sustainers).

To the Conference Program Committee for their time, ideas, and creativity around session topics. See our committee members: [conference.ncnonprofits.org/conference-program-committee](https://conference.ncnonprofits.org/conference-program-committee).

To the presenters and speakers for their time and expertise.

To speaker-in-waiting Emily Caldwell for being graciously willing to serve.

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To the Benton Convention Center for their support in executing a safe, post-COVID, in-person event.

To photographer Teri Saylor with Open Water Communications for capturing the sense of connection and enthusiasm throughout the event, [terisaylor.com](https://terisaylor.com).

To the Center's staff and board members for their diligent work, commitment, resourcefulness, and good humor.

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