

2024 Conference for North Carolina's Nonprofits

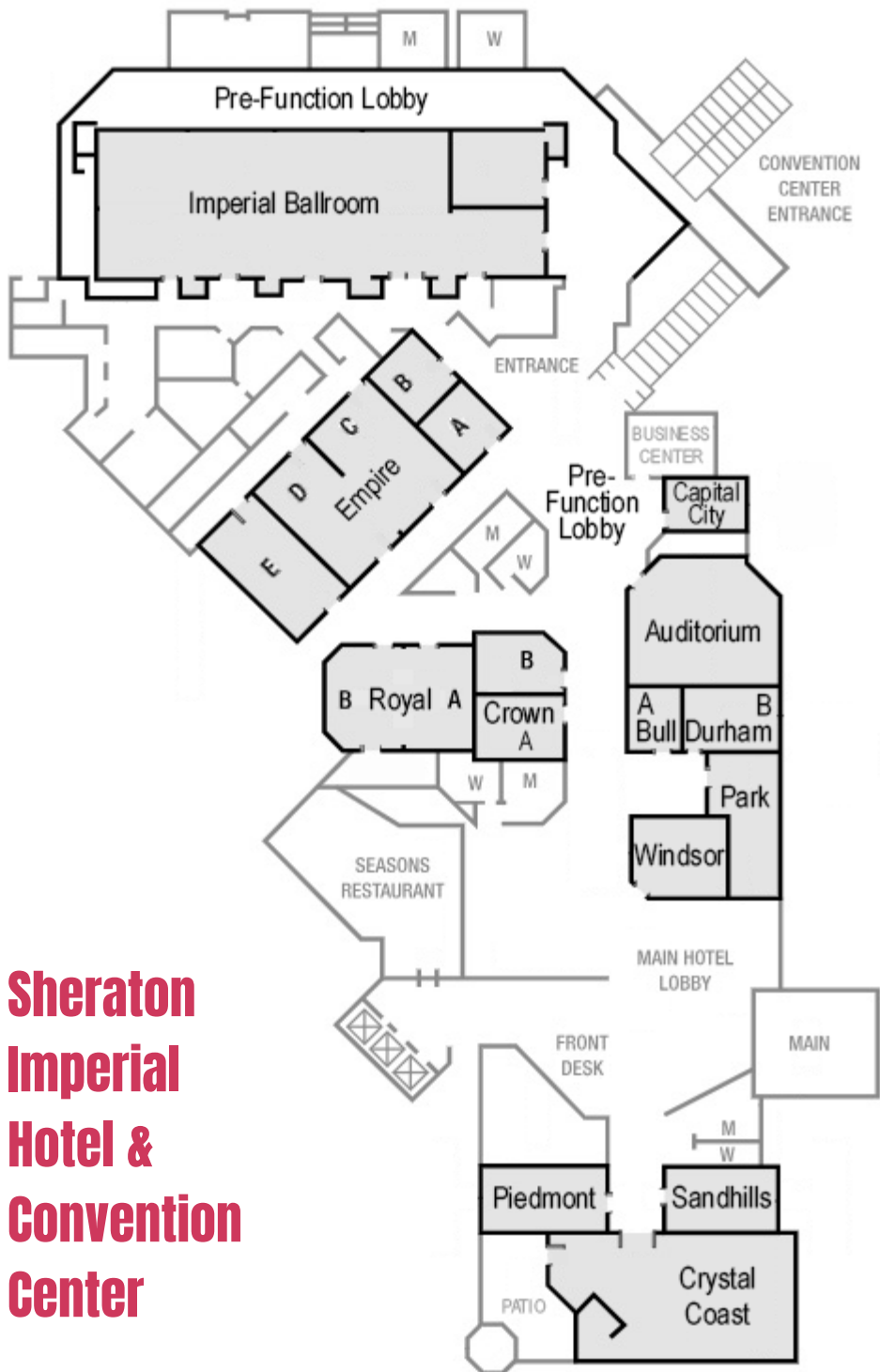


OCTOBER 22-23

**Sheraton Imperial Hotel & Convention Center
Research Triangle Park**

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Schedule of Events

TUESDAY 10/22

11:00 AM-7:00 PM	Registration & Nonprofit Marketplace open	Imperial Ballroom
12:00-5:00	Nonprofit Legal Compliance Workshop	Empire DE
2:00-3:15	Concurrent Sessions	
3:15-3:45	Refreshment & Networking Break	Imperial Ballroom
3:45-5:00	Concurrent Sessions	
5:15-7:00	Welcome & Networking Reception	Imperial Ballroom

WEDNESDAY 10/23

8:30-9:30 AM	Registration & Nonprofit Marketplace open	Imperial Ballroom
9:30-10:45	Concurrent Sessions	
10:45-11:15	Refreshment & Networking Break	Imperial Ballroom
11:15-12:30	Concurrent Sessions	
12:30-2:00	Networking Lunch	Imperial Ballroom
	KEYNOTE From Burnout to Breakthrough: Sustaining and Sparking Passion in Nonprofit Leadership	Imperial Ballroom
2:00-2:15	Networking Break	Imperial Ballroom
2:15-3:30	Concurrent Sessions	

NOTES

A salad bar lunch will be provided on Tuesday from 11 a.m.-12:30 p.m. for registrants of the Nonprofit Legal Compliance Workshop. Light refreshments will be served on Wednesday morning during registration.

The Sandhills Room is reserved as a lactation space. Request and return the room key at the conference registration table.



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Don't forget to take the post-event survey to tell us about your conference experience.



Session Tracks

Not sure which concurrent sessions to attend? These tracks offer an outline of sessions with similar topics or that align with specific job roles. Use the icons to identify sessions and follow a track.



MONEY & MANAGEMENT For those who manage your nonprofit's financial resources, from raising funds to managing their allocation, e.g. finance, fundraising, operations, compliance, risk management, executive leadership, or board members.



PEOPLE & PROCESS For those who focus on internally advancing your nonprofit's mission and connecting with the right people to do so, e.g. human resources, programs, leading your organization's equity, diversity, and inclusion work, executive leadership, or board members.



COMMUNITY & COMMUNICATIONS 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. communications, programs, community engagement, 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 Board of CPA Examiners Earn up to 9.5 CPE credits for attending the full conference, including the 2024 Nonprofit Legal Compliance Workshop.

NC State Bar Earn 4 hours of CLE credit for attending the 2024 Nonprofit Legal Compliance workshop.

Download forms at bit.ly/NCNPCCEU.



Conference Presenters

Learn about and connect with our conference presenters online at conference.ncnonprofits.org/speaker.

Nonprofit Marketplace

Thanks to our exhibitors! Visit their tables to learn about how they support nonprofits.

GO ON THE EXHIBITOR SCAVENGER HUNT! Discover fun facts about our exhibitors and win gift cards. Get your game card and details at the registration table.

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Visit the North Carolina Center for Nonprofits table near registration to learn about upcoming programs and membership opportunities including the new association health plan in partnership with Marsh McLennan Agency and multiple employer retirement plan in partnership with Mutual of America.



With election season in full swing, You Can Vote will be onsite with materials and to answer questions about how nonprofits can get involved in voter engagement.

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Nonprofit Legal Compliance Workshop

12:00-5:00 PM

Empire DE

Workshop sponsored by Schell Bray PLLC and Langdon & Company, LLP

Presenters



Ed Chaney
Partner
Schell Bray PLLC



David Heinen
VP for Public Policy
and Advocacy
North Carolina
Center for Nonprofits



Deetra Watson
Principal
Blackman & Sloop
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Charitable nonprofits must 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 information on many common legal issues that affect nonprofits.

The first two hours provide an overview of key legal compliance issues for charitable nonprofits operating in NC, including state laws governing nonprofit corporations, board fiduciary duties, federal tax laws relevant to 501(c)(3) public charities, state tax and charitable solicitation laws applicable to nonprofits, employment law basics, election year considerations for charitable nonprofits, basics on audits and financial reviews, and rules for nonprofits with federal and state grants and contracts.

Breakout Sessions:

- The Legal Landscape for Racial Equity Initiatives, facilitated by Ed Chaney
- From Numbers to Necessities: Nonprofit Accounting Hot Topics & Federal Regulations, facilitated by Deetra Watson
- Everything Your Nonprofit Needs to Know About the 2024 FLSA Overtime Rule, facilitated by David Heinen

Throughout the workshop, participants will have the opportunity to write down questions about covered topics as well as other legal issue of importance for their nonprofits. During the final hour, presenters will issue spot on these questions and provide answers when they can do so so without giving legal advice. As time allows, presenters will also provide insights into new legal developments that are relevant for nonprofits but may not have been explored in the workshop.

CEU for attending full workshop: Attorneys earn 4 hours of CLE credit from the NC State Bar. CPAs earn 5 hours of CPE credit from the NC State Board of CPA Examiners. Fundraisers earn 5 CFRE points from Certified Fundraising Executives International.



Modern-Day Financial Governance | Empire ABC

PRESENTER: Mig Murphy Sistrom, Owner, Mig Murphy Sistrom, CPA, PC

This is an open conversation for current or prospective board members (and/or staff interested in governance) about financial management responsibilities. What are board members responsible for? Does the treasurer have special duties? What information should be addressed in formal policies? Are board members liable for financial malfeasance? Are board members accountable for staff-level procedures? What financial data should we see? These and many other questions will be addressed in this interactive conversation.



Leveraging Nonprofit Intelligence Tools and Storytelling | Crystal Coast



PRESENTERS: Matthew Elliott, Co-Founder and COO, The Data Bull; Marshall Worth, Co-Founder and CEO, The Data Bull

Session sponsored by Blue Cross and Blue Shield of North Carolina

In today's data-driven landscape, nonprofits are increasingly harnessing the power of nonprofit intelligence to drive impact and communicate their mission effectively. By integrating data analytics, donor insights, program outcomes, and compelling stories, nonprofits can humanize their data and share narratives that illustrate the real-world impact



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of their work and the lives transformed by their efforts. By weaving together data-driven insights and authentic stories, nonprofits can engage donors, volunteers, and supporters on a deeper level, fostering connections, driving empathy, and mobilizing collective action toward positive social change.



Transforming Philanthropy: Insights from the 'Uncharitable' Documentary | Crown



PRESENTERS: **Sabrina Slade**, Vice President, John Rex Endowment; **Kristine Sloan**, Executive Director, Leadership Triangle; **Kristen Brown Smalley, J.D., LL.M.**, Assistant Vice President of Gift Planning, Duke University; **Shannon Williams**, Managing Director, Armstrong McGuire

Session sponsored by Armstrong McGuire

For seasoned nonprofit leaders, funders, and board members, this session is designed to engage experienced professionals in a critical discussion about the evolution of philanthropy and how nonprofits are funded. Whether you've seen the *Uncharitable* documentary or not, you've got opinions on restricted funding and overhead. Come ready to shake up your perspectives and discover alternative approaches that can drive real change.

Refreshment Break 3:15-3:45

Break sponsored by DMJPS PLLC

Hydration Station sponsored by Blue Cross and Blue Shield of North Carolina Foundation

The graphic features a dark blue background with a pattern of white dots in the bottom right corner. On the left, there is a logo consisting of several orange dots of varying sizes arranged in a curved, upward-pointing path. To the right of the logo, the text "Armstrong McGuire" is written in a large, white, sans-serif font. Below the logo and name, there is a block of white text describing the organization's mission and values. On the right side of the graphic, there is a large, square QR code with a white border.

Armstrong McGuire

Founded in 2004, our diverse team of advisors works exclusively with nonprofit and foundation leaders to align strategy, optimize operations, build capacity, and lead nationwide searches that bring supremely talented individuals to high-impact organizations.

We believe in unlocking the potential of nonprofit leaders and the communities they serve.

Let's unlock your potential together.

Concurrent Sessions 3:45-5:00



The Power of Evaluative Thinking | Crown



PRESENTERS: Beth Bordeaux, Co-Owner, Partners for Impact; Charlene Reiss, Consultant, Partners for Impact; Stan Holt, Co-Owner and Senior Advisor, Partners for Impact

Evaluation is more than just determining the success of your program's performance. It can be a powerful tool to create strategy, assess organizational capacity, and collect stories and data for marketing and fundraising. Presenters will introduce the concept of evaluative thinking – with examples at the individual, organizational, and systems-change levels – and how it plays a role in all aspects of the organization, from planning programs through measuring outcomes and impact. Each participant will work through a logic model template with step-by-step guidance to identify the necessary actions to achieve your intended impact. Participants will craft at least one long-term outcome and several medium- and short-term goals associated with it, as well as some activities and inputs needed to achieve the goals. Participants will share their logic models during small group discussions and support each other in creating clear pathways from input to impact and identifying indicators of progress. Guidance will include specific methods for ensuring the evaluative process examines and addresses racial equity in programs, budgets, data collection, and reporting on outcomes.

Do you ever need an evaluator?



The **NC Evaluators Network** gives you access to 100+ North Carolina evaluators with expertise in a wide range of fields.

To find the right evaluator for you, share your RFP or job announcement at ncevaluators.org.





10 Epic Innovative and FREE Tools To Electrify Staff Training | Crystal Coast

PRESENTERS: Eric Rowles, CEO, Leading to Change, Inc.; DJ Coles, Training Associate, Leading to Change, Inc.

Is your staff inspired...or in pain? Staff training and professional development is often viewed as a painful process – but it doesn't need to be! When you apply a 13 Minute Roller Coaster approach, combined with a MIST formula of facilitation, and integrate innovative assessment, technology, and group development techniques, training can be ROCKSTAR like! Don't miss this showcase of multiple strategies, techniques, and examples of how (and why) staff training and DYNAMIC professional development can be the SPARK to keep your organization healthy and moving forward.



Create a Fired-Up High Performing Board! | Empire ABC

PRESENTER: Gail Perry, President, Gail Perry Group



Let's create a board that's fired-up, enthusiastic, and ready to work. Discover how to change your board's culture, build an internal culture of philanthropy, and create new involvement and commitment. You'll learn 10 ways to Liven Up Your Board Meetings, and the Tough Questions to discuss with your board.



welcome to brighter

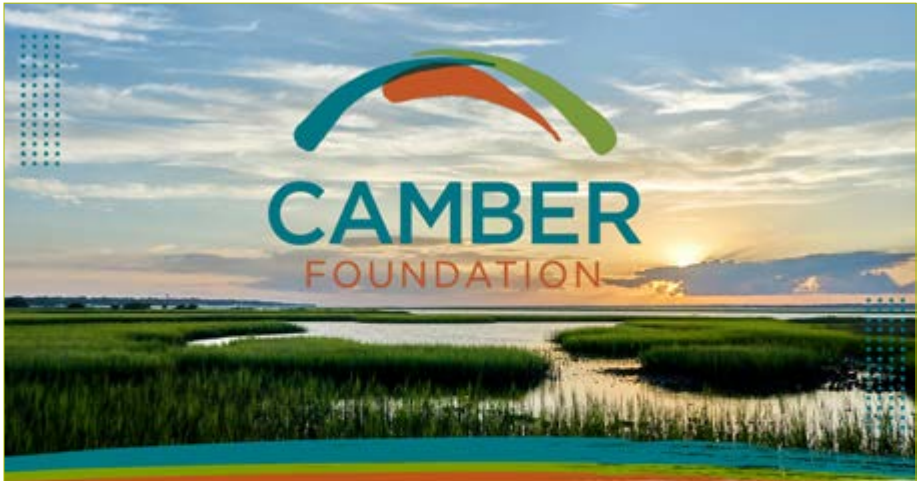
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Welcome & Networking Reception

5:15-7:00

Imperial Ballroom

Make your way to the Imperial Ballroom for a brief welcome program. Then mingle with colleagues, scavenger hunt with exhibitors, and enjoy appetizers and a cash bar.

The North Carolina Center for Nonprofits will welcome guests.

Conference sponsor CapDev will reveal highlights from their Compass 2024 survey about what nonprofits and funders say about the future of the nonprofit sector.

Senator Mike Woodard will be honored with the Center's inaugural North Carolina Nonprofit Legislative Champion Award. For the past 12 years, Senator Woodard has been a tireless advocate in the state senate for North Carolina's nonprofit sector and for the causes of many nonprofits in Durham and across the state. The Center and the state's nonprofits are incredibly appreciative of Senator Woodard's leadership. Our communities are a much better place because of his service.



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Are nonprofits and funders navigating
the future with the same map?

CapDev invites you

to take an exclusive look at the *first-of-its-kind* survey
of both NC nonprofits and funders, exploring the challenges and
opportunities facing the sector.



Compass2024

CapDev's trailblazing lookbook

POINTING THE DIRECTION OF THE SOCIAL IMPACT SECTOR

Join us for the Tuesday evening
reception at 5:15 p.m. to learn
more about Compass 2024.



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Networking & Refreshments 8:30-9:30

Concurrent Sessions 9:30-10:45



Partnering for Impact: How Government Agencies and Nonprofits Collaborate to Make a Difference | [Crystal Coast](#)

PRESENTERS: Eliza Edwards, Deputy Director, NC Office of Strategic Partnerships; **Caroline Farmer**, Executive Director, Governor's Crime Commission; **Wayne Bostick**, Parliamentarian/Administrator, Durham Chapter, North Carolina A. Philip Randolph Institute; **Chastan Swain**, Executive Director, NC Hometown Strong

Partnerships between state government agencies and nonprofit organizations present opportunities to leverage each sectors' resources and expertise to maximize impact. This session will explore some of the ways in which state government and nonprofits partner to inspire ideas for impactful cross-sector partnership in attendees' diverse contexts. Speakers representing state government agencies and nonprofit organizations, focused on topics from criminal justice to the arts, will highlight existing government-nonprofit partnerships; offer guidance for identifying opportunities that might be ripe for government-nonprofit partnership; share promising practices and lessons learned thus far; and provide tips for attendees who are interested in partnering across sectors but not sure where to start. A session theme will be using research to benefit cross-sector partnerships.

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Zero to Hero: Budget-Friendly Social Media Advertising Strategies | [Empire ABC](#)

PRESENTER: **Kenton Spencer**, Executive Director, DataWorks NC

Transform your social media presence from unnoticed to unmissable. This hands-on session is designed for individuals and organizations looking to maximize their impact on social media without breaking the bank. Learn how to harness the power of organic reach, create compelling content, and utilize free or low-cost tools to craft and distribute effective advertisements. Discover innovative techniques to engage your audience, drive campaigns, and measure the success of your efforts. You get the strategies needed to thrive in the digital

space and walk away with actionable insights and the confidence to elevate your social media game, all while keeping your budget intact.



Strategic Synergies: Elevating Nonprofit Impact through Integrated Fundraising and Donor Engagement | Empire DE

PRESENTER: Latoya Robinson, CEO/Mission Catalyst, LUR Growth

In today's nonprofit landscape, the key to sustainable growth is mastering strategic fundraising and deepening donor relationships. Led by a seasoned nonprofit growth strategist with over a decade of executive leadership experience, this session will equip you with actionable strategies to elevate your fundraising efforts and cultivate lasting donor engagement. Participants will explore: innovative techniques for analyzing and leveraging your data for targeted fundraising campaigns that resonate with potential donors; crafting compelling narratives that effectively communicate impact and drive donor commitment; and practical methods for enhancing donor devotion, ensuring every interaction moves beyond transactions to build genuine, long-lasting connections. By integrating these approaches, nonprofits can increase your funding and ensure it aligns perfectly with your mission's core values and goals. This session's valuable insights will empower both new staff members and experienced executives to drive your organizations toward greater success and sustainability.



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Refreshment Break 10:45-11:15

Break sponsored by Marsh McLennan Agency

Hydration Station sponsored by Blue Cross and Blue Shield of North Carolina Foundation

Concurrent Sessions 11:15-12:30



Amplify, Unify, Impact: Advocacy Communications as a Strategic Superpower | Crystal Coast

PRESENTERS: Alaina Kennedy, Principal Consultant, Atromitos LLC; Kate McNulty, Principal Consultant, Atromitos LLC

Strategic communication is the art of purposefully crafting and disseminating messages to achieve specific organizational objectives. Advocacy, often overlooked in strategic communications, is pivotal for nonprofits; it embodies the core 'why' of nonprofits – driving the intentional change needed to fulfill their mission. This session reframes advocacy as a strategic communication tool that transcends noisemaking by crafting messages that mobilize and effect meaningful change. You'll learn strategies for integrating advocacy into strategic planning processes, explore how diverse perspectives invigorate advocacy, and share insights on how to foster inclusive dialogue to amplifying diverse voices. You'll leave with a clear understanding of advocacy's role as a potent form of leadership, informing public opinion and guiding others toward positive change.



Winning Grants: Elevate Your Funding Game | Empire DE

PRESENTER: Adriana Cosgriff, Founder and CEO, Capacita Consulting

This interactive session goes deep on grants, providing best and promising practices, real world tips, and items to watch out for when applying to grants. We will discuss government grants (federal, state, and local), foundation and private grants, and corporate philanthropy grants. The session will cover: grant research; outreach and building network connections with grantmakers; components of strong grant applications and best practices for a strong grant application practice; and relationship management and compliance.



Trauma in the C-Suite | Empire ABC

PRESENTER: Sabrina Gilchrist, Executive Director, Knothole Foundation of the Carolinas

Session sponsored by Camber Foundation

"Uneasy lies the head that wears a crown," a line from Shakespeare's Henry IV, Part 2, is often misquoted as "Heavy is the head that wears the crown." Regardless of the adage one prefers, the message is the same: While it is rewarding, leadership at the highest ranks is also fraught with challenges, conflict, uncertainties, difficult decisions, and unreasonable expectations, including sacrificing oneself and one's family to care for others. The events of the last four years have only exacerbated the difficulties leaders face. This is especially true in the nonprofit sector, resulting in rising burnout, turnover, and a slew of body-mind-spirit maladies among our top leaders. This session puts a spotlight



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on how many issues affecting the mental health and wellness of C-Suite leaders are not adequately discussed and answers the clarion call to facilitate safe spaces for vulnerability, authentic conversation, support, and the shared learning of tips and techniques to overcome trauma in the C-Suite. This session was created and designed in conjunction with Tayuanee Dewberry, Chief Executive Officer, Girl Scouts Hornets' Nest Council.

Networking Lunch & Keynote Session

12:30-2:00

Imperial Ballroom

KEYNOTE

From Burnout to Breakthrough: Sustaining and Sparking Passion in Nonprofit Leadership

KEYNOTE PRESENTER: **Amber Melanie Smith**, Speaker, Nonprofit Founder and Social Entrepreneur

In 2024, Amber did something she thought she'd never do: quit her dream job. As the Founder and Executive Director of the nonprofit she started in college, Activate Good, she spent most of her adult life building and growing an organization to answer the personal call she heard as a young professional to make an impact.



Feeling burned out and out of sync, Amber realized her story was one of many similar stories among her nonprofit and social impact peers. Every year, the nonprofit sector loses thousands of leaders and talent to burnout and retirement, and the number of new changemakers joining the sector is too few to close the gap. How can we re-energize our current social impact leaders while creating the conditions needed to usher in new cohorts of passionate changemakers?

In her keynote, Amber will share her burnout story, and offer insights into how we can create personal and organizational strategies to keep critical talent in the social impact game – while also creating the conditions necessary for new changemakers to join the fight for a better world.

The audience will learn...

- ▶ How to reflect, refuel, and recalibrate yourself and your organization so you can stay in the work (even if the work changes over time!)
- ▶ How misconceptions about the nonprofit sector are creating barriers to entry for new talent
- ▶ Ways we can all work together to create a pipeline of social impact evangelists

Networking Break 2:00-2:15



The Fundraising Merry-Go-Round: Small Shop Fundraising for Sustainability | Empire DE

PRESENTERS: Tameka Brown, Founding Executive Director, H.E.A.R.T.S. (Helping Each Adolescent Reach Their Spark); Heather Hu, VP, Southeast Regional Development, American Cancer Society

Fundraising is complex but necessary, and the constant need to find funding can feel like a crazy ride on a merry-go-round. While many organizations are not in a position to hire a professional fundraiser or only have one person carrying the load, there are simple steps you can take today to build sustainable funding. This session will provide “fundraising nuggets” on practical steps to build diverse, sustainable, and flexible funding. It’s designed for executive directors, staff, and board who are tired of chasing dollars and want to fundraise more strategically and effectively. Get tips and strategies that have been developed over decades of experience and are proven to work. Learn how to position your organization for growth so you can get off the Fundraising Merry-Go-Round!



Game Plan for Greatness: Strategic & Succession Planning | Empire ABC

PRESENTERS: Colleen Bozard, Owner/Principal, ccozard consulting; Ginny Waller, Principal Adviser, Waller Consulting, LLC

Former nonprofit executive directors turned consultants with close to 40 years of combined experience will cover the essentials of strategic planning, from crafting vision and mission statements to setting actionable goals and measuring success. The session emphasizes the importance of aligning strategic and succession planning, identifying key roles, and developing future leaders. Through interactive exercises and real-world case

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studies, you'll gain the tools and knowledge to create robust plans that ensure leadership continuity and organizational success. Get ready to play the game for greatness!



Neuroscience of Implicit Bias: Cutting-Edge Strategies for Nonprofit Leaders | Crystal Coast



PRESENTERS: Laura Ligouri, Executive Director, Mindbridge; Andrea Marzilli, Learning Specialist, Mindbridge

Session sponsored by Mutual of America

In today's diverse and interconnected world, implicit bias presents a significant challenge that nonprofit leaders must address to ensure equity and inclusivity. This session will delve into the neural mechanisms underlying implicit bias, exploring how unconscious attitudes and stereotypes are formed and maintained in the brain. Participants will gain insights from the latest research in cognitive neuroscience and social psychology, learning how these findings can be applied to develop more effective bias reduction strategies. By using science-based approaches, this session bypasses feelings of shame and judgment often associated with bias training, creating a more open and constructive environment for learning and growth. Through interactive exercises, discussions, and real-world case studies, participants will uncover unconscious influences on behavior, discover practical techniques to identify implicit biases, and implement innovative strategies to counteract them to create lasting change within your organization. By focusing on both individual and systemic levels, this session empowers nonprofit leaders to foster an inclusive culture that promotes equity and social justice.



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Kenan-Flagler Business School
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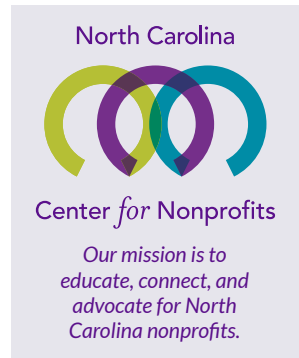
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Regional Office
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Johnny Wilson
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Juanita Wilson
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Indians (EBCI), Cherokee



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To the North Carolina nonprofits and foundations who invest in themselves and our sector as members of the Center. See our Members: ncnonprofits.org/members/member-directory.

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/about/sustainers-donors.

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

To the presenters and speakers for their time and expertise, and to speaker-in-waiting Tim Dively for being graciously willing to serve.

To the exhibitors and advertisers whose support helps keep conference registration affordable.

To the Sheraton Imperial Hotel & Convention Center for their support in executing a safe in-person event.

To photographer Teri Saylor with Open Water Communications for capturing the sense of connection and enthusiasm throughout the event, terisaylor.com.

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

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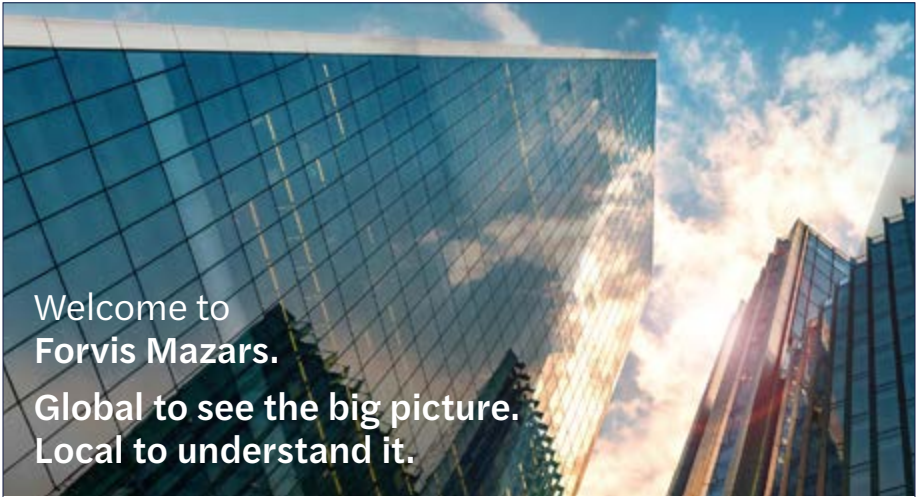
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