



PHILANTHROPY INSTITUTE **2022**

Thursday, July 14, 2022
Crowne Plaza Asheville

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TITLE



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PHILANTHROPY INSTITUTE 2022

Thursday, July 14, 2022 at Crowne Plaza Asheville

8:45 AM	Registration begins, Coffee & Tea available
9:15 AM	Welcome & Opening Remarks (Crowne Ballroom)
9:45-10:45 AM	Session 1 Workshops
11:00 AM-12:00 PM	Session 2 Workshops
12:00-12:30 PM	Lunch (Crowne Ballroom)
12:30 PM-1:45 PM	Keynote Presentation (Crowne Ballroom)
2:00-3:00 PM	Session 3 Workshops
3:15-4:00 PM	Session 4 Wrap Up & Closing Words
4:00-5:15 PM	Social Reception (Blue Ridge Room)

MT. PILOT ROOM

CROWNE
BALLROOM

MT. MITCHELL ROOM



CROWNE PLAZA RESORT ASHEVILLE

*Workshops will take place in the Mt. Pilot,
Mt. Mitchell, & Blue Ridge rooms.*

*Please return to the Crowne Ballroom for
lunch and the keynote presentation.*

BATHROOMS

BLUE RIDGE ROOM

SESSION ONE 9:45 AM - 10:45 AM

Crypto Philanthropy **Doug Hartjes, CFRE**

Mt. Pilot Room

With the massive surge in valuations over the last few years, cryptocurrency has gained popularity among a number of investors who hope to cash in on its phenomenal growth. As cryptocurrency assets rise, many investors are opting to donate crypto to reduce their tax burden.

In this session, we will:

1. Decode what cryptocurrency and blockchain technology is
2. Discuss why crypto donations matter to your organization
3. Outline steps that will prepare you to accept crypto

We will demystify how crypto philanthropy works and how you can add it to your menu of giving options.

Courageous Conversations for Nonprofit Transformation: How Bold Action Turns Policy Into Equitable Practice **Ile Adaramola & Jess McLean**

Mt. Mitchell Room

How do you navigate the implementation of diversity, equity, and inclusion (DEI) programs for nonprofits from an anti-racist model? Learn how Read to Succeed turned policy into bold action by engaging BIPOC leadership, building strong community partnerships, and embracing courageous conversations.

Nonprofits & Governmental Agencies **Amanda Edwards**

Blue Ridge Room

Critical to our success as fundraisers is understanding the dynamics of how nonprofits can build better relationships with their local government and elected leaders. Presenter Amanda Edwards is in a unique position serving as a Buncombe County Commissioner and fundraiser simultaneously.

Join us for inside tips and a conversation with Amanda about how to strengthen your case for support and build lasting relationships with your local government and elected leaders.

Who's in Charge? Creating a Dynamic Board which Fundraises **Kimerly Hinkelman**

Mt. Pilot Room

This workshop provides participants with information and practical tips to

1. Create a functional and healthy relationship between the governing board and the executive leader. Each partner in the relationship has specific responsibilities and brings certain skills to the table, which together can create an unbeatable team, and
2. Discuss methods and tools to help the Board embrace and succeed in their role as fundraisers for the organizations.

The Great Resignation: Hiring & Retention Strategies **Drew Pollick**

Mt. Mitchell Room

COVID-19 triggered a multi-faceted labor shortage across every sector. Employers are now searching for solutions to attract, hire, and retain top talent to keep their organizations running and propel them forward.

This program reviews research that will improve your understanding of employee attitudes and employer expectations. It explores strategies and actions you can take to acquire and retain a healthy, engaged workforce.

Is a Remote Fundraising Role Right for You?

**Tiffany Drummond Armstrong,
Jonathan Frappier, & Ben Underwood**

Blue Ridge Room

The pandemic ushered in an era of remote work - even in the realm of fundraising. Remote work creates ample opportunity to work with organizations and colleagues beyond our local community. How can you tell if a fully remote job is right for you? How do you fundraise remotely anyway?

Join this panel discussion to learn from the experience of three fundraisers who made the leap to remote work. Bring your questions about what it's like to inspire donors to give while working from home.

LUNCH 12:00 PM - 12:30 PM

FIESTA FEVER BUFFET LUNCH CATERED BY CROWNE PLAZA

The buffet offers gluten free, lactose free, & vegetarian options.

Seasoned Ground Beef
Chili Lime Chicken
Pork Carnitas
Sauteed Peppers & Onions
Spanish Rice & Refried Beans
Flour & Corn Tortillas
Tortilla Chips
Shredded Lettuce, Diced Tomato, Sour Cream, Shredded Cheddar
Cheese, Salsa, & Guacamole
Meatless Bean Chile Con Queso
Churro's

TABLE TOPICS

Several of the lunch tables will have a table topic displayed on them. Join other nonprofit employees at a table whose topic is of interest to you. There will be a moderator stationed at each table to help guide discussion and contribute their own knowledge.

We hope you'll use this time to share your own expertise and learn from others! Tables without a displayed table topic, as well as outdoor seating, are available for those who do not wish to partake in this part of the programming.

Lunch Table Topics:

- *So You Want to be a Consultant*
- *Organizational Systems & Time Management*
- *Telling Your Organization's Story*
- *Getting Your CFRE*

Leading with Intent: Succession Planning

Mandy Pearce

Crowne Ballroom

Succession planning is the process of identifying the critical positions within your organization and developing action plans and processes to ensure success during a time of transition for staff, board, and volunteers.

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 is the session for you. Join Funding For Good as we discuss strategies to ensure your mission can move forward productively, even during transitions.



Mandy Pearce, CFRE

mandy@fundingforgood.org

For over two decades, Mandy and her team of experts have shared their proficiency in fundraising through executive coaching, strategic and development planning, seminars and specialized consulting programs. Mandy's dynamic teaching style has brought thousands of people to her presentations at conventions, training workshops, and online platforms. In 2009, Mandy founded her flagship company, Funding for Good, to equip organizations with all of the skills and tools needed to become successful and sustainable.

Mandy lives in Hickory with her husband, Ricardo, and their two furbabies, Dalli and Max. She and Ricardo also own and operate a successful landscaping and custom woodworking company, Two Green Thumbs and More (twogreenthumbsandmore.com). On her days off, Mandy enjoys working in their garden, sipping sweet tea on their porch swing with a good magazine, and cooking gourmet meals for their family and friends.

Succession Planning: Strategies that Work, Part 2
Mandy Pearce

Crowne Ballroom

Let’s talk next steps. After understanding the various types of transitions, reviewing legal compliance, and establishing roles and responsibilities, where should your organization focus its energy during a well-rounded succession planning process?

We will discuss how to determine the information to include in transition processes and explore how a communication plan can ensure your team and community know what to expect during the succession process.

We’ll discuss organizational access points, communication plans, and onboarding with intent.

Each participant will receive the following:

- 1. Succession planning checklist
- 2. Guide to getting started with succession planning
- 3. Leadership Profile Matrix for Succession Planning

Art + Science x Magic = Fundraising Success (And Other Universal Truthiness)
Ben Pendry

Mt. Mitchell Room

In this hour, we'll discuss building a foundation of moves management, the critical role of the major gifts officer, and the invaluable role of true partners on the programmatic side of the house.

Western Carolina University is moving into its third capital campaign and only our second comprehensive effort. In the last two years we have refreshed portfolios, changed fundraising systems, welcomed a new chancellor, exercised enormous grace, welcomed good luck, oozed chaos, and consumed LOTS of coffee.

Join Ben, and let's talk through major and planned gift best practices (and a few best EFFORTS).

SESSION FOUR 3:15 PM - 4:00 PM

Philanthropy Institute Reflections & AFP WNC “Whiteboard” Session Ben Underwood & Tiffany Armstrong

Crowne Ballroom

If you are attending Philanthropy Institute, this session is for you! To close out our day of programming, we'll gather the whole group together to reflect on the day and envision the future of our AFP chapter. This session will be facilitated by the current chapter president (Ben) and our incoming president (Tiffany), but the stars of the session will be you. As we move into a post-ish-pandemic era, the Board of AFP WNC wants to hear from you about what you want to see from your chapter.

Please take a few moments throughout the day to consider these questions:

Reflection:

- What did you learn today that you want to know more about?
- What practice did you pick up today that you plan to implement?

Whiteboard

- What's your “AFP Story”? Why are you a member? What keeps you engaged?
- What programming and events have been most useful to you?
- What types of events would you like to see in the future?
- What times of day and meeting formats are most accessible?
- Do you prefer formal presentations or informal networking events?

Please join us immediately after Session Four in the Blue Ridge Room for a social reception. Thank you to the AFP WNC Board, Philanthropy Institute Volunteer Committee, sponsors, and session speakers for making this day possible!

2022 PRESENTERS



Ile Adaramola

Ile is an Asheville-based lawyer and nonprofit leader dedicated to developing community-powered solutions, with a passion for education as a fundamental right. In addition to serving as Board Chair for Read to Succeed Asheville/Buncombe, Ile serves on the board for Asheville City Schools Foundation and is an active member of The Links, Incorporated. After earning a Bachelor of Arts in Criminal Justice and Philosophy with high honors from the University of North Carolina at Charlotte, Ile attended North Carolina Central University School of Law on a full academic scholarship from the American Intellectual Property Law Education Foundation, earning her Juris Doctor with honors.



Tiffany Drummond Armstrong

Tiffany is in her 20th year of fundraising and nonprofit management, having served The Leukemia & Lymphoma Society, Pediatric Brain Tumor Foundation, and College Diabetes Network. She worked many years in event fundraising and has since been Executive Director, Vice President of National Campaigns, and Chief Development Officer.

Currently the Managing Director of Advancement and Operations for the College Diabetes Network, she has hired and managed teams across the country while working in an office, hybrid, and now fully remote. Tiffany currently serves on the Board of Directors for the Association of Fundraising Professionals and the YWCA and also raises funds for a scholarship at the University of North Carolina at Asheville.



Amanda Edwards, CFRE

Amanda is the Executive Director of College Advancement at A-B Tech. She has served as Executive Director of the Asheville-Mountain Area Chapter of the American Red Cross and the Literacy Council of Buncombe County. She was recognized as the AFP-WNC Outstanding Fundraising Executive in 2017.

Amanda is also the vice-chair of Buncombe County Commission and represents District 2. She serves on the Affordable Housing Subcommittee, Department of Health and Human Services Board, and Local Emergency Planning Committee. Amanda also helped revamp and increase transparency for the County's non-profit funding process.



Douglas Hartjes, CFRE

Doug is the founder and President of COR Consulting – a firm that specializes in fundraising counsel, strategic planning, and major gift/capital campaigns. He has spent the last 20 years of his career in nonprofit leadership and has served in varied roles in the nonprofit sector, including Chief Executive Officer, Chief Development Officer, Board Member, Board Chair, Mentor and Consultant. He is a past chair of the Association of Fundraising Professionals Charlotte Chapter and served on its board for eight years. Doug is also an accomplished speaker and facilitator who works with boards, leadership, and staff on how to achieve fundraising and nonprofit excellence.



Jonathan Frappier

Jonathan has more than 20 years of experience in nonprofit executive management, fundraising, operations, and program development. He's supervised at top professional theaters and universities (Emory University: assisting to close a \$1.6B capital campaign, UNCA: principal and major gifts for capital campaign, and SCAD: Head of Institutional Advancement for five campuses on three continents). He is also a yogi, meditator, runner, and vegan. Jonathan is the Director of Donor Relations for The Humane League and loves working remotely, managing a team spread across the United States. He prefers the Oxford comma.



Kimerly Hinkleman

Kimerly has been a trusted leader, resource, and advocate for nonprofit organizations for over 30 years, and applies her diverse leadership experiences to assist organizations across the country to advance their missions. Her professional experience includes serving at executive-level leadership positions for health systems, hospital foundations, and non-profit agencies.

A frequently sought-after facilitator and teacher, Kim serves as an instructor for non-profit management programs, most recently Pathways and Western Carolina University. Kim's specialty areas include fund development and fundraising, external relations, partnerships, strategic planning, volunteer programs, and board development.



Jess McLean

Jess is an experienced Executive Director and fundraiser with a passion for building mission-driven partnerships that support children, families, and communities. After growing up in Asheville and graduating from TC Roberson in 2004, Jess received her Bachelor's Degree in Sociology and Environmental Studies from Boston College. She spent the majority of her career in marketing, communications, and fundraising working for tech startups in Austin and San Francisco. She first joined Read to Succeed in 2019 as a volunteer reading tutor.



Ben Pendry, MPA, CFRE

Ben is Assistant Vice Chancellor for Development at Western Carolina University. Prior to serving in this role, he was executive director of advancement services for the university and held positions in fundraising management and major gifts at UNC Charlotte and Sigma Chi Foundation. Ben holds a masters degree in public administration from UNC Charlotte, a bachelors degree in political science and history from WCU, and earned the Certified Fundraising Executive designation in 2014.

He is a member of the Rotary Club of Sylva, is committee chair for Cub Scout Pack 999, runs very slowly, backpacks even slower, and is married to the remarkable Jenna with whom he shares responsibility for two children and a very weird cat.



Drew Pollick

Drew is the Managing Partner and Founder of Craft HR Solutions, a premier consulting firm focused on serving mission-driven organizations. He leads a consulting team with decades of experience that delivers HR assessments, compensation and benefits benchmarking, training, and fractional HR services. He thinks 2022 is a year of opportunity for evolving workplaces and leadership skills.

Drew holds an MBA from Boston College and a MA in Higher and Postsecondary Education from Teachers College, Columbia University. He is SHRM-SCP certified and has held HR leadership roles at companies ranging from start-ups to the Fortune 500.



Ben Underwood

Ben has had a diverse fundraising career. His first role in corporate and foundation relations was with Teach For America in Chicago. He went on to lead fundraising at nonprofits focused on early childhood education and criminal justice reform in Illinois. After relocating to Asheville with his wife and two sons in 2016, he served as Associate Vice Chancellor for Advancement Operations at UNC Asheville. In the last year, he has moved into a fully remote role leading the fundraising team for a national education nonprofit, The New Teacher Project.

2022 AFPWNC BOARD

Ben Underwood - Chapter President
Tiffany Drummond Armstrong, CFRE - President Elect
Edie Weichert - Secretary
Andrew Nelson - Treasurer
Alex Comfort, CFRE - Vice President Membership
Chelsea Rath - Communications Chair
Jessica Frantz, CFRE - Fundraising Chair
Bill Norris, CFRE - National Philanthropy Day Chair
Laurel Amabile, CFRE - Philanthropy Institute Chair
Adarrell Gadsden - Sponsorships Chair
Sara Morrison - Member At-Large
Aimee Smallwood - Member At-Large

PHILANTHROPY INSTITUTE VOLUNTEER COMMITTEE

Laurel Amabile, CFRE, Chair
Amanda Bryan
Leah Craig Fieser
Jessica Frantz, Chapter Administrator
Kate Frost
Ben Underwood

SESSION NOTES

CHANGE THE WORLD



WITH A GIVING HEART

National Philanthropy Day®

AFP WNC is now accepting nominations for the 2022 National Philanthropy Day Awards, which we will celebrate on Wednesday, November 16.

The deadline for award nominations is Friday, July 29. Please give some thought today to your philanthropic leaders, and complete a nomination. Don't miss this opportunity to honor and recognize the caring people in our community who are making a difference!

For more information, visit afpwnc.org/npd.

