

A: January 17, 2011: Philanthropic Challenges

- Event Format: In Person Session
- B: Location: Crowne Plaza Hotel, 201 S. McDowell St, Charlotte, NC 28204
- C: Sharon Harrington, VP Programming, AFP Charlotte Board
- D: Program Evaluation by Rating Evaluation Survey (Survey Monkey)
- E. Learning Objective Assessment: None
- F. Type of Program: Single Session Event

TIME ALLOCATION: 1.5 Hours

CONTENT CODE NUMBER: 2

You won't want to miss AFP Charlotte Chapter's first program for 2011, presented by Michael Marsicano, president & CEO of The Foundation for the Carolinas. Michael will tackle such issues as:

- What is being done locally to determine what role private philanthropy can play in narrowing the achievement gap in public education;
- How non-profit leaders can find creative and innovative solutions to persistent fundraising challenges through the use of professional consultants;
- Ways local corporations are establishing employee disaster and hardship relief funds;
- The importance of workplace giving campaigns;
- And much more...

About Our Presenter: Michael Marsicano, Ph.D. is President and Chief Executive Officer of Foundation For The Carolinas. Managing assets, owned and represented, of approximately \$850 million, the Foundation holds over 1800 charitable funds. In the ten years Dr. Marsicano has been at the helm of FFTC contributions to the Foundation have totaled more than \$1.4 billion and grant awards more than \$763 million.

Dr. Marsicano joined the Foundation in 1999 after serving as President and CEO of the Arts & Science Council in Charlotte, North Carolina for 10 years. During his tenure, the united arts fund moved to the nation's highest in per capita annual giving.

Dr. Marsicano has been active in several national and local organizations. He has chaired the Board of the National Assembly of Local Arts Agencies and the University of North Carolina School of the Arts, and has served on the Boards of Americans for the Arts, Charlotte Chamber of Commerce, Charlotte Symphony Orchestra, and the University of North Carolina at Charlotte Foundation, as well as the Board of Community Foundations of America. He currently serves on the Governing Boards of Duke University, Queens University and the Winthrop University Foundation as well as the Boards of Charlotte Center City Partners, the Nasher Museum of Art, and the Vann Center for Ethics at Davidson College.

A native of New York, Dr. Marsicano received his Bachelor of Science, Masters of Education and Doctor of Philosophy from Duke University. He is married to the Reverend Leslie Montfort Marsicano, also a graduate of Duke University and the Duke University Divinity School. Leslie is an ordained Methodist Minister serving Davidson College as Associate Dean for Academic Administration. The Marsicanos have three sons.

A: February 16, 2011: How to Romance a Foundation! Panel

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- B: Location: Crowne Plaza Hotel, 201 S. McDowell St, Charlotte, NC 28204
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TIME ALLOCATION: 1.5 Hours

CONTENT CODE NUMBER: 3

On February 16, 2011, AFP-Charlotte Chapter will have a panel of foundation leaders who will help us understand how they like to be wooed. They will answer such questions as:

- What are the best ways for organizations to introduce themselves to foundations?
- How important is it for organizations to understand the mission of a particular foundation prior to initiating a relationship?
- Why does the "boiler-plate" approach not work?
- What makes one organization's project stand out from all of the others?
- What are some of the most common mistakes committed by grantseekers, and how can they avoid those pitfalls?

Our panel discussion will be moderated by Sharon Harrington, JD, CFRE, director of development at the College of Liberal Arts & Sciences at UNC Charlotte. Our panelists include:

Thomas W. Lawrence, III – Tom began his career in the general services group of McGladrey & Pullen in Richmond, VA before moving to Charlotte, NC in 2000 to take a position with Arthur Andersen in its Family Wealth Planning division. In 2002, Tom joined the Levine family as Chief Financial Officer. He oversees the personal finances, tax compliance and investment portfolio management for the family and its Foundation. In 2008, Tom took a larger programmatic role with The Leon Levine Foundation as a Vice President before becoming its first Executive Director in 2009.

Ellison Clary - Ellison is director of Charlotte Community Relations for BlueCross BlueShield of North Carolina. He assumed that position in September 2010, after operating Ellison Clary Comprehensive Public Relations for more than seven years. Clary has worked as a reporter or editor at The Charlotte News, The Charlotte Observer, The Hickory (NC) Record, and the Tuscaloosa News, among others. He has also done PR work for Carolina Power & Light (now Progress Energy) and Bank of America.

Jay Everette - Jay is Senior Vice President and Community Affairs Manager for Greater Charlotte for Wells Fargo, and an officer of the Wachovia Wells Fargo Foundation. In 2010 the Foundation awarded over \$10.3 million in grants to non-profit organizations in the region supporting programs in the areas of education, community development, health and human services and arts, history and culture. Prior to his current role in philanthropy, Jay worked in marketing, brand management and corporate communications for Wachovia.

A: March 16, 2011: Fire Up Your Board! Turn Their Passion into Action

Event Format: In Person Session

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CONTENT CODE NUMBER: 2

Wish you could create a fired-up, engaged board excited about possibilities for your organization and eager to play a part in making it happen? Consultant and author [Gail Perry, CFRE](#) will share her Fired Up system for igniting your board's passion, energizing its culture, and putting everyone to work where you need them.

Learn a new approach to board governance that incorporates team-building, inspirational, motivational and psychological ideas to take your board to a whole new level, and have some fun in the process!

You'll discover:

- How to gently "manage up" and lead your board members where you need them.
- Learn simple steps to ignite your board members' passion for the cause.
- 12 ways to Liven Up a Board Meeting.
- Five critical things board members want - and how you can give it to them.
- Ways to overcome the "all talk and no action" syndrome.

Gail Perry, MBA, CFRE

Author, speaker, consultant to nonprofit leaders and boards

www.gailperry.com

A: May 18 16, 2011: Does Growing Revenue Equate to an Effective Fundraising Program? Not Necessarily"

Event Format: In Person Session

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F. Type of Program: Single Session Event

TIME ALLOCATION: 1.5 Hours

CONTENT CODE NUMBER: 1

Would you like to learn how to better maximize growth in giving? Are you looking for more effective ways to improve donor retention?

John Joslin, CFRE and Senior Consultant for Talisma (formerly Donor2) will reveal key results of the Fundraising Effectiveness Project survey. This program will also provide fundraisers a better understanding of how organizations can more effectively retain past donors and develop strategies for expanding donor retention. This program will help you understand the effectiveness of your fundraising program, including....

The key results of the Fundraising Effectiveness Project survey

Why donor retention is an important issue and how to improve it, and

How to develop strategies for donor retention

John Elliott Joslin, CFRE is Senior Consultant with Donor2/Campus Management in Charlotte, North Carolina. Mr. Joslin joined Donor2 in 1991 and has more than 27 years experience in fundraising. A member of AFP since 1983, John was a founding Board Member of the Brandywine (DE) Chapter and has been a member of the New York and Boston chapters. Currently John is a member of AFP-Charlotte, where he chaired the first Fundraising Day in Charlotte and has served on a number of committees and boards for AFP, locally and internationally.

A: June 15, 2011: Asking the "Why" with Karla Williams, ACFRE

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CONTENT CODE NUMBER: 3

Asking the "Why" (a testimonial to Robert L. Payton)

Philanthropic fund raisers are the principal engineers providing power for the nonprofit sector. So important is our role, that it cannot be taken for granted. During the past 25 years, the development profession has matured; replete with sophisticated donor research, billion-dollar capital campaigns, and nana-second technology.

We have welcomed an influx of candidates from all walks of life; we learned how to court new types of donors, and we have transitioned through an economic recession. Why? What makes us the professionals we are . . . or are not? Do we live for, or on philanthropy?

Karla A. Williams, M.A., ACFRE, is principal of The Williams Group, located in Charlotte, NC; a firm that serves clients across the country who want to enhance and expand their philanthropic efforts. She formerly served as President of the Children's Hospital Foundation of Saint Paul, as Communications and Development Director for Children's Home Society of Minnesota, and as Executive Director of the Minnesota Zoological Society. Karla has a B.A. from Metropolitan State University with an emphasis in Nonprofit Management and Administration and an M.A. of Philanthropy and Development from St. Mary's University of Minnesota. She holds a certificate from the Executive Leadership Institute from the Center on Philanthropy at Indiana University. She is the author of "Donor Focused Strategies for Annual Giving," and is a frequent presenter, instructor, and writer in marketing, communications, and development on a national level. She serves as a faculty member for The Fund Raising School at the Center on Philanthropy at Indiana University; as adjunct faculty for the Center for Nonprofit Management at University of St. Thomas in Minnesota; as core faculty for St. Mary's Master's program in Philanthropy and Development in Minnesota; as a member of the Faculty Academy and Master Trainer for the NSFRE Survey Course and First Course. Karla was a member of the first class to receive the designation of Advanced Certified Fund Raising Executive (ACFRE).

A: July 20, 2011: Effective Donor Communication

- Event Format: In Person Session
- B: Location: Crowne Plaza Hotel, 201 S. McDowell St, Charlotte, NC 28204
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CONTENT CODE NUMBER: 2

Effective Donor Communication: "Are you the best spokesperson?"

One of the essential ways to increase the effectiveness of any nonprofit organization is by creating a lasting relationship between the organization and individual contributors. Sometimes this relationship can be established through face-to-face meetings but, more often than not, other forms of communication are necessary. So how do you make the most of your donor communications?

Over four decades, Ty Boyd has had three concurrent careers: first as a broadcaster, then a professional speaker, and later a passionate teacher. These careers have ensured an interesting life for sure.

Our speaker will share some of the insights he has learned over his 32 years of teaching. In 1980, two of Ty Boyd's speaking clients - Aetna Life and Apple Computer - asked him to help their leaders, managers and salespeople to communicate more effectively with their customers.

"What I do know is that the messenger skills are equally important as the words of the message. We have spent years with some of America's finest organizations in creating powerful spokespersons for their businesses and products. Our faculty's job is to create powerful messengers."

Since 1980, Ty Boyd Executive Learning Systems has worked with thousands of individuals and organizations through their *Excellence in Speaking Institutes (ESI)*. These Institutes are held in Charlotte and for corporations in-house around the globe

Though the words we communicator's use to present our message are very important, *how we deliver* these words is the game changer. Come to our July 20th meeting prepared to give your whole attention to Ty Boyd, who has students from over 50 countries, every state and province in North America, and whose organization has coached some of America's greatest spokespersons.

About the Presenter: Ty Boyd, Chairman: Ty Boyd Executive Learning Systems (TBELS)

Ty Boyd spends his life today as a businessman and communications coach. He has spoken on five continents to more than a million people, and received the Oscar of the National Speakers Association - the Cavett Award.

Since 1980, Ty has also led the *Excellence in Speaking Institute (ESI)* ©. ESI teaches speaking and presentation skills to executives worldwide, with attendees from over 50 countries, representing all businesses and professions. Graduates come from every state and province in North America. Their company also provides one-on-one coaching for leaders, managers, salespeople, and other professionals.

He is the author of three books and has co-authored several others. Ty's book, *The Million Dollar Toolbox: A Blueprint for Transforming Your Life and Your Career with Powerful Communication Skills*, has received top reviews.

Before founding his learning company (1980), Ty was a successful radio and television personality (WBT and WBTV) in Charlotte. Ty Boyd is a graduate of the University of North Carolina at Chapel Hill.

A: September 21, 2011: High Net Worth Philanthropy

- Event Format: In Person Session
- B: Location: Crowne Plaza Hotel, 201 S. McDowell St, Charlotte, NC 28204
- C: Sharon Harrington, VP Programming, AFP Charlotte Board
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- E. Learning Objective Assessment: None

F. Type of Program: Single Session Event

TIME ALLOCATION: 1.5 Hours

CONTENT CODE NUMBER: 1

Presenter: Tom Lawson, Bank of America Merrill Lynch Philanthropic Management

Do you want to learn what motivates high net worth donors and apply what you learn to raise money for your organization?

This presentation will provide this information. Established in 2006, the Bank of America Merrill Lynch Study of High Net Worth Philanthropy, conducted in partnership with The Center on Philanthropy at Indiana University, is the largest and most comprehensive survey to date of the charitable practices and attitudes of wealthy Americans. The 2010 study examines, among other things, which nonprofit sectors wealthy donors support, how they direct their largest gifts, what motivates them to give and to discontinue support for a nonprofit organization, where and how often they volunteer, and who they turn to for advice about philanthropy.

B. Thomas Lawson, Jr. is Southeast Senior Philanthropic Advisor for Bank of America Merrill Lynch Philanthropic Management. Tom has more than nine years experience marketing and providing philanthropic investment management and administrative services to institutions and high net worth individuals and over 29 years experience serving non profit organizations. Tom is also a dynamic presenter and a rabid ASU Mountaineer!

Previously, Tom served as Senior Vice President for Donor Services for the Winston-Salem Foundation, Associate Vice Chancellor for Development for Appalachian State University and Director of Development for the School of Design, North Carolina State University. He serves on the Board of Visitors of Appalachian State University, the Troop Committee for Boy Scout Troop 920 and the Board of Directors for Central Forsyth American Legion Baseball. Tom is also is the Past President of the North Carolina Planned Giving Council. He earned his bachelors and masters degrees from Appalachian State University and is married with two sons.

A: October 19, 2011: Finding Dollars in a Desert: Tools for Successful Fundraising in Tough Economic Times

Event Format: In Person Session AND Extended Session

B: Location: Crowne Plaza Hotel, 201 S. McDowell St, Charlotte, NC 28204

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E. Learning Objective Assessment: None

F. Type of Program: Single Session Event

TIME ALLOCATION: 1 Hours and EXTENDED SESSION 1 hour

CONTENT CODE NUMBER: 2

In a challenging economy, people make tough decisions about where they spend their dollars. How do economic realities and personal perceptions affect the nonprofit sector? Some decide to give less to each organization they support. Others may choose to stop giving to certain organizations. How do they make these decisions? What efforts can you take to minimize the impact on your organization?

In this interactive session, GoalBusters Consulting's Alice Ferris and Jim Anderson discuss:

- Economic realities for charities nationwide and locally
- "The Perfect Storm"
- Strategies to minimize or avoid these economic pressures
- What to do (and please DON'T do) when a donor says, "I can't contribute now"
- Six things you can do now to stabilize your organization and empower your team
- How to find the "oasis in the desert."

Breakfast presentation: National trends and specific local fundraising issues, adjusting your attitude for a new reality, proven things that you can do to cope with fundraising shortfalls

Extended presentation: ten strategies to raise money in a challenging environment, whether it's the economy or other "hostile" environments.

About GoalBusters: Alice L. Ferris, MBA, CFRE, ACFRE and James Anderson are partners in [GoalBusters](#), providing philanthropic leadership services, specializing in outsourced development for small nonprofits; integrated fundraising, marketing and strategic planning; and customized education and training programs. GoalBusters has clients in many sectors, including public and community broadcasting, education, arts and culture, social service, healthcare, and Native American causes. In their careers to date, Alice and Jim have helped raise over \$9 million for organizations and philanthropic causes.

Jim Anderson has more than 25 years of sales and sales training experience through his positions with local media and national research companies such as Nielsen Media, Simmons and Scarborough Research. Consistently recognized as a top revenue producer (\$30 million+), Jim earned "Sales Executive" and "Negotiator of the Year" awards. He migrated into the nonprofit arena in 2005, and specializes in analyzing donor motivations, implementing marketing and social media campaigns, finding compelling stories for organizational case statements, improving nonprofit communications, and making any special event more effective and fun. In 2010, Jim was selected at the AFP Northern Arizona Fundraising Professional of the Year.

Alice Ferris has over twenty years of professional fundraising experience, and is a two-time honoree as AFP-Northern Arizona Fundraising Professional of the Year. Alice is a member of the AFP International Board, was 2009-2010 Vice Chair, Member Services for AFP International and was the 90th professional in the world to receive the Advanced Certified Fundraising Executive credential. Alice is recognized for her on-air presence on many public television and radio pledge drives, and recently on the national PBS fundraisers, among them Timeless—A National Parks Odyssey and Andre Rieu Live in Vienna. She specializes in strategic and development planning, board development, annual giving, and nonprofit operations.

Alice and Jim, who are both AFP Master Teachers, have presented at AFP Chapters throughout North America and at the AFP International Conference.

A: November 16, 2011 - The Donor Relationship: Protocol and Ethics

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- B: Location: Crowne Plaza Hotel, 201 S. McDowell St, Charlotte, NC 28204
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- F. Type of Program: Single Session Event

TIME ALLOCATION: 1.5 Hours

CONTENT CODE NUMBER: 6

Michael Rose, CFRE, President and CEO, [Carolinas Healthcare Foundation](#)

Don't miss this extraordinary opportunity to learn from Michael Rose, President and CEO of Carolinas HealthCare Foundation, one of the most well-respected development professionals in the Charlotte Community. Michael will review the ethical standards that guide non-profit fundraising professionals, and share personal experiences that offer important lessons. Rose will also discuss the importance of etiquette and protocol in establishing rapport with individual donors and their advisors as well as other related issues including:

Ethical Standards in Fundraising
Donor Confidentiality
Donor Competency

With more than 35 years of experience in institutional advancement and fundraising, Michael Rose, CFRE, is among the most experienced hospital related foundation executives in the nation. He holds a B.A. from Mississippi College, ME from New Orleans Theological Seminary and a GS from the University of Alabama. Having served for more than 20 years in his current role as chief executive of Carolinas HealthCare Foundation, Michael has led the Foundation to become a major philanthropic resource in support of Carolinas HealthCare System. Creative in his approach to leadership and growth, Michael benefits from the attributes of an entrepreneurial spirit and an appreciation of solid business practices and plans.