

N C North Carolina
N G Network of Grantmakers



2018 Annual Meeting

February 28-March 1, 2018
Benton Convention Center
Winston-Salem, NC

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CONFERENCE AT A GLANCE

Day One - Wednesday, Feb. 28 // // // //

- 8:00 a.m. Registration Opens and Breakfast on Your Own
- 9:00 a.m.- Wednesday Workshops
11:30 a.m. • Community Foundations
• Education Funders
• Health Funders Roundtable
- 11:30 a.m. Break
- 12:00 p.m.- Opening Plenary
1:45 p.m. • Passing Gear Philanthropy: Accelerating Progress Toward One North Carolina
- 1:45 p.m. Break
- 2:00 p.m.- Afternoon Concurrent Sessions
3:15 p.m. • Fortify Your Donor Relations
• Legal Update: What's Next in Washington & Raleigh for Grantmakers?
• Philanthropy at the Intersection of LGBTQ+ Issues
• Thank You for Being a Friend: Fostering Grantee Inclusion
• The 10-Minute Impact Assessment
- 3:45 p.m.- Late Afternoon Concurrent Sessions
5:00 p.m. • Board Circle
• Don't Let Your Data Get Dusty: Putting What You Learn to Use
• For Emerging Leaders: How to Identify and Address Issues of Inequity in Philanthropy
• The Opioid Crisis: Examining the Landscape and Addressing the Impact
• Symbiosis in Philanthropy
- 5:00 p.m. Reception
- 6:30 p.m. Dinner
• Dine-Arounds / On Your Own

Day Two - Thursday, March 1 // // // //

- 8:30 a.m. - Donuts and Demographics
9:30 a.m. Breakfast Plenary
- 9:30 a.m. Break
- 9:45 a.m. - Morning Concurrent Sessions
11:00 a.m. • As the South Grows: Lessons from NC and the Rural South
• Creating Messages that Unite and Don't Divide
• Read Between the Lines: Understanding a Nonprofit's Financial Story
• You Have the Right to an Attorney
- 11:00 a.m. Break
- 11:15 a.m. - Late-Morning Concurrent Sessions
12:30 p.m. • As the South Grows: Nurturing our Practice
• Communicating in the Digital Age
• Evaluation that Supports Learning Together
• From K To Career: NC's Education Continuum
- 12:30 p.m. Break
- 12:45 p.m.- Closing Lunch and Conversation
2:00 p.m. • Foundation Collaboration: The Good, the Bad and the Potential

Check Out these Annual Meeting Features // //

#NCNG 2018

On Twitter? Connect and share with colleagues onsite and off using this hashtag. Find us on Twitter: @ncgrantmakers.

Parking

Parking is complimentary for those staying in the hotel. For others, we have validation cards at the NCNG registration desk.



8:00 a.m. **Registration Opens**

9:00 - 11:30 a.m. **Wednesday Workshops**

Community Foundations

Bryan Clontz

Join your community foundation colleagues from across the state for this fun Wednesday Workshop. We'll start with some networking and time to share with one another, and then will be joined by Bryan Clontz of Charitable Solutions, LLC. After working with or for more than 250 community foundations over the last 20 years, Bryan has developed a not-so-short list of things that drive him nuts. This fun, but intentionally provocative, talk will answer questions like: Who cares if you are the best kept secret in town? If you have Board deadwood, don't you think it's your fault? Why do you keep trying to gather acorns when mature oaks already exist? And there are 24 more fun-filled questions! Start the day off right and bring a sense of humor, thick skin, some tissues for tears and a notepad.

Education Funders

Gather together with your education funder colleagues to continue exploring the education continuum in North Carolina – from early childhood through post-secondary and beyond. You'll have a chance to check in with one another on who is doing what and how, we'll hear about efforts afoot at the state level to better align the full "P-16" continuum, and more.

Health Funders Roundtable

This Wednesday Workshop is back by popular demand! Join your colleagues in the NCNG Health Funding Learning Community for time to share, reflect, and discuss issues that are affecting the health of individuals and communities across our state. Come prepared to share what's new, challenging or exciting in your work.

11:30 a.m.

Break



Day One - February 28, 2018

12:00 - 1:45 p.m. **Opening Lunch and Plenary /// Day One**

**Passing Gear Philanthropy:
Accelerating Progress Toward One North Carolina**
David Dodson /// MDC, Inc

North Carolina is home to a broad and diverse family of foundations working on behalf of the people and places of our state. It is also home to entrenched issues that constrain the progress of those people and places. And while we're well capitalized compared to our neighbors in the southeast, philanthropic peaks, valleys and deserts mean that not all communities are equally equipped to address the challenges they face. In this keynote address, David Dodson will walk us through MDC's new report: "Philanthropy as the South's Passing Gear: Fulfilling the Promise," with a focus on the unique challenges and opportunities facing North Carolina.

1:45 p.m.

Break

2:00 - 3:15 p.m. **Afternoon Concurrent Sessions /// Day One**

Fortify Your Donor Relations
Bryan Clontz /// Charitable Solutions, LLC

Keeping a donor happy is not enough...period. What do you want donors to actually do to achieve your mission? Community foundation expert Bryan Clontz is back for this no-holds-barred session that deconstructs donor relations and then provides best practices and new metrics. Attendees will learn why activity-based metrics are not very valuable, how to recognize planning opportunities before it's too late, how to build annual goals that make sense and allow donor relations officers to express their own creativity, and much more. **This session is for community foundation staff and boards.**

**Legal Update:
What's Next in Washington and Raleigh for Grantmakers?**
Dianne Chipps Bailey /// Robinson Bradshaw

Join Dianne Chipps Bailey of Robinson Bradshaw for a discussion of how legislative and regulatory changes may impact the nonprofit sector, including private foundations, donor-advised funds and public charity grantmakers. Gain a deeper understanding of both proposed and enacted legislation and how to best prepare your organization for success in light of new state and federal rules. The presentation will cover federal tax reform, state real property tax exemptions, assumed names, regulatory moratoria, the Johnson amendment, and much more. The conversation promises to be lively and, as always, your questions and comments are welcome.



Philanthropy at the Intersection of LGBTQ+ Issues

Matt Blinstrubas /// Elton John AIDS Foundation

Sally Gambrell /// Gambrell Foundation

Judith Montenegro /// Latinos in the Deep South

Lee Storrow /// Strowd Roses, Inc.

Issues affecting the lesbian, gay, bisexual, transgender, and queer community have been at the forefront of public dialogue in North Carolina and across the country in recent years. Increased visibility has spurred progress forward, while also highlighting significant disparity. Philanthropic institutions are partnering in new and creative ways to combat various challenges impacting this diverse community. From investing in youth services to combatting the HIV epidemic across the south, from supporting intersectional organizing in communities of color to addressing stigma, philanthropy is having a tremendous impact on LGBTQ+ issues. Join this panel conversation with regional and statewide leaders to discuss new and emerging strategies to improve outcomes for the LGBTQ+ community, learn what work is on the horizon, and how philanthropy can be at the forefront of progress for the LGBTQ+ community.

Thank You for Being A Friend: Fostering Grantee Inclusion

Meghan Duffy /// Grantmakers for Effective Organizations

Authentic relationships with grantees are challenging. Learn how to address some of the most important barriers in this session with our partners at Grantmakers for Effective Organizations (GEO). They will introduce tools, resources and frameworks to foster grantee inclusion, help you identify new approaches to engaging grantee partners, and assist participants – no matter their role within the organization – in mapping out potential internal changes that foster grantee inclusion.

The 10-Minute Impact Assessment: A Framework For Discussing Your Philanthropic Impact

Jeanne Metzger /// Exponent Philanthropy

We all want to have impact—or, in simpler terms—make a real difference. This desire often leads us to ask questions such as: How do we know we're making a difference? Could we be making a bigger difference? We want to have a bigger impact, but how do we get there? Join Exponent Philanthropy for this interactive session. Participants will use Exponent's 10-Minute Impact Assessment tool to identify areas of strength and opportunities for increasing impact, as well as tips and resources for the journey toward greater impact. Get to know your peers while sharing feedback and insights about practical and effective impact strategies.



Day One - February 28, 2018

3:45 - 5:00 p.m. **Late Afternoon Concurrent Sessions /// Day One**

Board Circle

Moderator: Bobbi Haggood /// Educational Foundation of America and Prentice Foundation

The roles and responsibilities for foundation trustees are rewarding – and challenging. Join your fellow board members from across the state in this confidential and candid conversation about lessons learned, challenges conquered, and issues on the horizon. Hear from your peers and come prepared to share. **This session is for foundation trustees and board members only.**

Don't Let Your Data Get Dusty: Putting what You Learn to Use

Joy Vermillion Heinsohn /// Z. Smith Reynolds Foundation

Virgil Smith /// Z. Smith Reynolds Foundation

How foundations prioritize giving largely depends on information they gather about the communities they serve. The Z. Smith Reynolds Foundation (ZSR) recently took a step back and collected data in order to determine how it could best serve North Carolina communities moving forward, examining and evaluating its current approach to grantmaking and broader work. As part of its assessment, and in addition to statewide, regional, and community-level research data, the Foundation launched a statewide listening and learning tour. The executive director, trustees, staff, and Community Leadership Council members made their way across the state to hear directly from state leaders, local leaders and community members about trends and challenges, as well as opportunities, successes and ideas for making North Carolina a better place. What the Foundation heard from North Carolinians informed what it is referring to as its “emerging direction,” which will continue to evolve as it further designs and develops each of its components. During this session, ZSR will discuss its process, the lessons learned, how it navigated an internal assessment led by a Trustee-staff team, and share what it heard from North Carolinians. This is intended to be an interactive session, so come prepared to ask questions!

For Emerging Leaders: What's Wrong with this Picture? How to Identify and Address Issues of Inequity in Philanthropy

Tamir Novotny /// Emerging Practitioners in Philanthropy (EPIP)

There is now a fair amount of agreement in mainstream philanthropy about the need to embed equity in our work. In this session, we will examine common foundation practices that undermine equity and identify possible reforms. Then we'll explore ways to advocate for these changes, regardless of where you may sit in the organizational chart. This session is intended for those newer to the sector, but all are welcome.



The Opioid Crisis: Examining the Landscape and Addressing the Impact

Jesse Battle /// TROSA

Jeff Pruett /// Partnership for Community Care

According to the N.C. Department of Health and Human Services, more than 12,000 North Carolinians died from opioid-related overdoses from 1999 to 2016. The epidemic is devastating families and communities and overwhelming medical providers and treatment efforts. What do funders – with all types of priorities, from health to education to community development – need to know about how they can help? In this session, we will examine the landscape of the opioid crisis and share what funders can do to address this complex issue.

Symbiosis in Philanthropy: How Private and Community Foundations Can Work Together

Bryan Clontz /// Charitable Solutions, LLC

Like the oxpecker and the zebra, private and community foundations have a symbiotic, mutualistic bond in the philanthropic ecosystem. In this session, Bryan Clontz will outline the specific ways these very different types of foundations can work together to advance their work in the community.

5:00 - 6:15 p.m.

Reception

6:30 p.m.

Dinner

Sign up for Dine-Arounds at registration, or have dinner on your own



Day Two - March 1, 2018

8:30 - 9:30 a.m. **Breakfast Plenary /// Day Two**

Donuts and Demographics Breakfast Plenary: Urbanization and Migration in North Carolina

Rebecca Tippett /// Carolina Demography at the Carolina Population Center at UNC-Chapel Hill

North Carolina is experiencing profound demographic changes: Our growing population is increasingly diverse, we face looming impacts of an aging population, and there are wide and widening disparities between urban and rural counties. Grab a donut and a cup of coffee and join us as Carolina Demography's Rebecca Tippett provides a big-picture overview of these and other trends, with specific attention to the differential impacts of migration and the implications as grantmakers think about the people and places they serve.

9:30 a.m.

Break

9:45 - 11:00 a.m. **Morning Concurrent Sessions /// Day Two**

As the South Grows: Lessons from North Carolina and the Rural South

Ben Barge /// National Committee for Responsive Philanthropy

Investing in work for justice and inclusion in the South – particularly in rural areas – can be daunting for philanthropy. Structural inequities along race and class lines obscure the progress and exciting potential of systems-change efforts that can achieve widespread and deep impact. As the South Grows, an initiative by the National Committee for Responsive Philanthropy and Grantmakers for Southern Progress, is designed to provide national and southern funders alike with practical tools to partner effectively with communities on the front lines of change. Join us to explore lessons learned around rural philanthropy from North Carolina and across the South, including new giving data and useful approaches for promoting equity. We'll dig a little deeper in the follow-up session at 11:15.

Read Between the Lines: Understanding a Nonprofit's Financial Story

Natasha Davis /// Quality Enhancement for Nonprofit Organizations (QENO)

Nonprofit financials like audits, budgets and 990s help foundations understand the stability and fiscal health of their grantee organizations. In this session, you'll learn which financial information gives the best picture of an organization's health, understand new rules in place for nonprofit audits, and get an overview of an audit layout with helpful hints about translating the notes. You will also walk out with a helpful tool to use when assessing a nonprofit's financial health.



Creating Messages that Unite and Don't Divide

Minda Brooks /// Friday Center (moderator)

Laura Gerald /// Kate B. Reynolds Charitable Trust

Tara McKenzie Sandercock /// Community Foundation of Greater Greensboro

Mebane Rash /// EducationNC

The current climate around issues that impact people's day-to-day lives in North Carolina and around the country is often tense and divisive. Yet foundations and nonprofits continue to tackle critical, intertwined issues ranging from poverty to health to economic opportunity. To be successful, organizations must find ways to include diverse perspectives and groups in the conversation and ensure everyone, regardless of background or political affiliation, feels welcome at the table and is part of the solution. This is easier said than done at a time when certain words and topics can cause people to tune out or choose sides. Join us to hear from two foundation leaders and a nonprofit journalist who are using their voices and organizations to bridge divides, encourage civil discourse, and find inclusive solutions to entrenched problems in communities across North Carolina.

"You Have the Right to an Attorney.."

Legal Aid Programs in North Carolina

Katie Eyes /// Blue Cross and Blue Shield of North Carolina Foundation

Philip Belcher /// Community Foundation of Western North Carolina

Anita Brown Graham /// UNC School of Government (Moderator)

"You have the right to an attorney. If you cannot afford an attorney, one will be provided for you." While we hear these words repeated time and again in popular culture, their scope is limited to criminal proceedings. The latest research shows that 71% of low-income households experienced a civil legal problem last year. In civil cases involving fundamental issues – the right to stay in one's home, access to healthcare, finding safety from domestic violence, caring for children – an attorney is not provided. Civil legal aid helps people and communities in crisis solve problems and address inequities. Vulnerable North Carolinians rely on civil legal aid to meet their basic needs and protect their rights. Whether your foundation seeks to move people out of poverty, improve the health of families or educational outcomes of children, or strengthen the economic stability of communities, civil legal aid is a critical part of the solution. Join this session to better understand how funders across the state are using legal aid to further their missions.

11:00 a.m.

Break



Day Two - March 1, 2018

11:15 - 12:30 p.m. **Late Morning Concurrent Sessions** /// Day Two

As the South Grows: Nurturing Our Practice

Ben Barge /// National Committee for Responsive Philanthropy

Many philanthropic practices advance equity – understanding diverse community assets, providing multi-year flexible funding, promoting civic engagement, and so many others – but changing practice is a complicated undertaking with complex challenges and lots of players. In order to help the philanthropic sector grow and change, we need to learn from each other and pave our own paths. Join your peers and Ben Barge from the National Committee for Responsive Philanthropy to troubleshoot challenges and share successes you’ve encountered while trying to operationalize best practices in equity.

Communicating in the Digital Age

Shannon Ritchie /// Digital Communications Strategist

Meg Buckingham /// Triangle Community Foundation

Eric Fraizer /// The Duke Endowment

Mary Alice Holley /// Conservation Trust

Think that digital communications isn’t part of your role? Think again. Foundation communications go beyond the staff member responsible for crafting annual reports and marketing materials. Establishing best practices for all staff with digital communications is a strategy that can help propel you and your organization into the future. In this session you’ll walk out with new tools and ideas to help your digital communications reach new heights.

Evaluation that Supports Learning Together

Tanya Beer /// Center for Evaluation Innovation

Strategies for systems change – in the form of advocacy, networks, movements, community change initiatives or collective impact efforts – aim to motivate and align multiple actors around shared goals. Contrary to other philanthropic approaches where the funder functions as the “command center” for planning and strategic decision making, these approaches attempt to distribute decision making among many interdependent actors who together shape problems and solutions. In this context, evaluation and learning designed primarily for foundation use misses the opportunity to help whole systems learn and accelerate results. Using examples from real-life grantmaking initiatives, this session will explore the practical side of which evaluative questions, data and approaches to learning actually help independent organizations learn and adapt together.



From K to Career:
Understanding North Carolina's Education Continuum
Rebecca Tippett & Jessica Stanford /// Carolina Demography at the
Carolina Population Center at UNC Chapel Hill

Education has been identified as one of the most important factors in economic mobility and security. By 2025, more than 65% of North Carolina jobs will require some postsecondary education, according to the Georgetown Center on Education and the Workforce. Rebecca Tippett and Jessica Stanford from Carolina Demography at UNC-Chapel Hill will explore North Carolina education continuum data, from K-12 to college and career programs. Attendees will hear about research findings on milestones and key performance indicators for student behaviors and achievements that determine progress to the next step in their education. We'll examine how outcomes vary across geography and demographics, with an eye to where interventions may have the greatest impact in improving outcomes. And we'll cover next steps to increase postsecondary educational attainment that leads to family supporting employment.

Break

12:30 p.m.

12:45 -2:00 p.m. **Closing Lunch and Conversation** /// Day Two

Foundation Collaboration:
The Good, the Bad and the Potential
Meghan Duffy /// Grantmakers for Effective Organizations

Foundations partner for a variety of reasons, including increasing visibility on issues and institutions, achieving greater policy impact, and reducing risks when embarking on a new grantmaking strategy. Grantmakers for Effective Organizations will join us to talk through some of the models of collaboration and ideas for best practices. Then, we'll hear from your peers in the field about their own collaborative work here in North Carolina and beyond. They'll share their strategy and models for working together, what was successful, what wasn't, and what they wish they'd known in the beginning. This will be an interactive session – come with your ideas and suggestions on how to continue to boost collaborative work in the philanthropic sector.



Speaker Biographies

Ben Barge /// Senior Associate for Learning and Engagement /// National Committee for Responsive Philanthropy

Ben is passionate about mobilizing resources for community-led, systemic change. As a Senior Associate for Learning and Engagement, Ben provides leadership on strategic campaigns with foundation and nonprofit partners around NCRP's key research, such as the Southern Progress Grantmaking Project. He also manages the Impact Awards and Philanthropy's Promise, NCRP's signature programs celebrating philanthropic excellence; organizes in-person presentations across the philanthropic sector; and coordinates NCRP's internship program. Ben also serves as NCRP's link to the immigrant rights movement. Before NCRP, Ben worked as a Fellow at the Z. Smith Reynolds Foundation, where he facilitated grantmaking, evaluation and special projects across five portfolios: Community Economic Development, Social Justice & Equity, Strengthening Democracy, Public Education and the Environment. While there, he coordinated an emerging network of rural funders, oversaw a nonprofit internship program for diverse next generation leaders and helped improve responsive programming for Latino-led grantees. A Southeastern native, Ben was born and raised in Georgia and received his undergraduate degree from the University of North Carolina at Chapel Hill. He volunteers in his free time with the DC Childcare Collective and the 18th Street Singers.

Jesse Battle /// Director, Men's Program /// TROSA

Jesse Battle leads the men in TROSA's program by building their ability to maintain a clean and sober lifestyle while improving their education and skills. He joined the TROSA staff soon after graduating from TROSA in 1997 and held leadership positions in several departments prior to becoming the Director of Men's Program in 2000. He served on the boards of Troy House Community Corrections Center, NC Alcohol and Drug Council, Durham Teen Court, Durham Drug Court, and is a North Carolina Addictions Fellow. Jesse is a current board member of the Carolina Justice Policy Center. Jesse has obtained an AAS in Computer Network Administration, a BS in Human Services and Management, and a MS in Mental Health Counseling. Jesse is also a Licensed Clinical Addictions Specialist (LCAS), Licensed Professional Counselor Associate (LPCA), Certified Substance Abuse Counselor (CSAC), Internationally Certified Alcohol and Drug Counselor (ICADC), and Certified Substance Abuse Residential Facility Director (CSARFD).

Tanya Beer /// Associate Director /// Center for Evaluation Innovation

Tanya Beer is Associate Director of the Center for Evaluation Innovation, where she helps to lead the Center's work, with a particular focus in the areas of systems change and advocacy evaluation. Tanya has a broad range of evaluation experience in the philanthropic, nonprofit, and public sectors. Prior to joining the Center, she was Assistant Director of Research, Evaluation, and Strategic Learning at The Colorado Trust, a private foundation focused on improving the health and well being of all Coloradans. While there, she developed and managed Trust-funded evaluations, facilitated the application of evaluation and research data to decision making, and supported knowledge sharing and learning within the foundation and with external audiences. Before joining The Colorado Trust, Tanya was a Senior Legislative Performance Auditor for the Colorado Office of the State Auditor. Tanya holds graduate degrees in public administration and international relations from Syracuse University, and an undergraduate degree in English and communication studies from Drake University in Iowa.



Philip Belcher /// Vice President, Programs /// The Community Foundation of Western North Carolina
Since August 2012, Philip Belcher has served as Vice President, Programs, of The Community Foundation of Western North Carolina. Formerly the President of the Mary Black Foundation in Spartanburg, South Carolina, Associate Director of the Health Care Division of The Duke Endowment, and a corporate and securities attorney with the Parker, Poe law firm in Charlotte, Philip currently serves on the North Carolina Steering Committee for the Nurse Family Partnership and the Board of the North Carolina Network of Grantmakers. A graduate of Furman University, Southeastern Baptist Theological Seminary, and the Duke University School of Law, he also has an MFA in Poetry from Converse College. He is an Advisory and Contributing Editor for Shenandoah, the literary journal of Washington & Lee University, and a staff writer for the Asheville Poetry Review and has published poetry and poetry criticism widely in literary journals.

Minda Brooks /// Director of Engagement /// Wildacres Leadership Initiative
Minda Brooks is the director of engagement and impact at the Wildacres Leadership Initiative, a leadership program that helps North Carolina leaders engage with others across political, geographic and demographic differences. Minda came to the Fellowship program from Duke University, where she managed the Benjamin N. Duke Scholarship Program, a merit scholarship for NC and SC high school students who demonstrated a commitment to servant leadership. Prior to that, she worked at her undergraduate alma mater, UNC-Chapel Hill as an academic advisor. Minda earned a Master of Arts in Theatre Studies from the University of Colorado at Boulder.

Anita R. Brown-Graham /// nc IMPACT Director /// UNC School of Government
Anita R. Brown-Graham rejoined the School of Government in September 2016 to lead ncIMPACT—the public launch of a special initiative that seeks to expand the School’s capacity to work with public officials on policy issues that affect North Carolina communities. Through ncIMPACT she helps local governments use data to address complex challenges. Brown-Graham’s first tour as a faculty member was from 1994–2006, when she covered the areas of civil liability and community and economic development aimed at revitalizing communities. In 2007 Brown-Graham became the director of the Institute for Emerging Issues (IEI) at North Carolina State University. There, she led IEI’s work to build North Carolina’s capacity for economic development and prosperity. Each year, she and her colleagues at IEI worked with leaders across North Carolina in business, government, and higher education to focus on issues important to North Carolina’s future. Brown-Graham began her career as a law clerk to the Honorable William B. Shubb in the Eastern District of California and as business litigation counsel in a Sacramento, California law firm. She is a William C. Friday Fellow, American Marshall Fellow, and Eisenhower Fellow. In 2013, the White House named her a Champion of Change for her work at IEI, and the Triangle Business Journal named her a 2014 Woman in Business for her policy leadership in the state. She also currently serves on the boards of several organizations, including North Carolina Interest on Lawyers’ Trust Accounts (NC IOLTA), a program of the North Carolina State Bar that uses the interest income collected on lawyers’ general pooled trust accounts to make grants for civil legal aid and other administration of justice projects. Brown-Graham earned an undergraduate degree from Louisiana State University and a law degree from the University of North Carolina at Chapel Hill.



Speaker Biographies

Meg Buckingham /// Director of Marketing and Communications /// Triangle Community Foundation

Meg Buckingham manages all communications, media relations, and marketing with the goal of better communicating the impact and value of Triangle Community Foundation to the community. Meg has extensive experience in nonprofit marketing and development. She previously worked for several large organizations, including The Boston Foundation, Meredith College, and United Way. She is a writer, taught at the collegiate level, and started her career as a print journalist for a daily newspaper in Western Massachusetts. Meg received her Bachelor's degree from Westfield State College and her Master's degree from Suffolk University in Boston.

Dianne Chipps Bailey /// Attorney /// Robinson Bradshaw

Dianne Chipps Bailey, an attorney based in Charlotte, North Carolina, leads the Nonprofit Organizations and Foundations practice group at Robinson Bradshaw. Her practice is dedicated to the representation of nonprofit organizations, their senior management and volunteer leaders. Dianne has extensive experience advising a diverse group of nonprofits in all aspects of their organization, administration and management. Dianne writes and speaks nationally on topics related to nonprofit legal compliance and management. She graduated with high honors from the University of California at Berkeley and received her law degree, cum laude, from Georgetown University Law Center. For updates on nonprofit law and trends in philanthropy, follow Dianne on Twitter: @Dianne_C_Bailey.

Bryan Clontz /// Founder and President /// Charitable Solutions, LLC

Bryan Clontz is the founder and president of Charitable Solutions, LLC, specializing in noncash asset receipt and liquidation, gift annuity reinsurance brokerage, gift annuity risk management consulting, emergency assistance funds and life insurance appraisals/audits. He also serves as partner of Ekstrom Alley Clontz & Associates – a community foundation consulting firm in New Haven, CT. Bryan is the founder of the Dechomai Foundation, Inc. and the Dechomai Asset Trust - two national donor advised funds focused on non-cash assets generally and S-corp transactions, respectively. He is also the founder and president of The Emergency Assistance Foundation, Inc. – a national fund allowing employers to create emergency assistance and disaster relief funds for their employees. Bryan has given more than 2,000 presentations on charitable gift planning and community foundation topics); been published in an international insurance textbook; and written more than a dozen articles in financial services and planned giving journals, including a planned giving manual entitled Just Add Water, which has sold more than 2,000 copies. He has been quoted by the Wall Street Journal, New York Times, Kiplingers Personal Finance, Bloomberg Wealth and serves as a guest columnist on charitable tax issues for Forbes.



Natasha Davis /// Executive Director /// Quality Enhancement for Nonprofit Organizations

Natasha Davis draws on her 16 years of finance and management experience to help strengthen our region's nonprofit sector. Natasha earned her BS in Accounting from University of North Carolina Greensboro with an Information Systems concentration and her Masters in Public Administration from UNC Wilmington with a Nonprofit Management concentration. Natasha has experience in both the for-profit and nonprofit sectors in the roles of staff member, board member, funder, and consultant. Natasha started working with QENO in 2010 as a graduate program assistant and has served in multiple roles until being selected as QENO Director in 2013. In 2015, she was recognized as WILMA Magazine's Woman to Watch in the nonprofit category. Natasha leads QENO's operations, programming, and strategic planning efforts.

David Dodson /// President /// MDC, Inc

Since joining MDC in 1987, David has directed major projects to increase student success in public schools and community colleges, address regional economic decline, strengthen community philanthropy, and build multiracial leadership across the South and the nation. As president of MDC since 1999, a significant portion of his work has been dedicated to working with foundations of all kinds—private, family, health conversion, community, and corporate—to help them develop “Passing Gear Philanthropy” strategies to address poverty and reduce social disparities using a process described in MDC's 2007 State of the South Report, “Philanthropy as the South's Passing Gear.” To date, through MDC's Passing Gear advisory practice, Dodson and MDC have helped Southern foundations redirect more than \$1 billion in philanthropic assets to address structural barriers to progress and equity for the people and places they serve. Past Passing Gear partners include the Woodward-Hines Education Foundation in Mississippi, the Danville Regional and Allegheny Foundations in Virginia, and the John M. Belk Foundation in North Carolina.

He is coauthor of numerous MDC publications on issues of regional economic competitiveness, educational attainment, youth and young adult employment, and strategic philanthropy. He is a member of the boards of the Public Welfare Foundation, the Center for Law and Social Policy, and Durham Technical Community College. He has also served as a trustee and board of director member of the Mary Reynolds Babcock Foundation and the Hitachi Foundation. Prior to joining MDC, he served as executive director of the Cummins Foundation and director of corporate responsibility for Cummins, a Fortune 500 manufacturer of diesel power systems based in Columbus, Ind., that is widely recognized for its ethical performance. David received his bachelor's degree in architecture and urban policy from Yale University, a master's degree in ethics and theology from Yale Divinity School, and a master's degree in public and private management from the Yale School of Organization and Management.



Speaker Biographies

Meghan Duffy /// Associate Vice President of Programs /// Grantmakers for Effective Organizations

Meghan Duffy is Associate Vice President of Programs at Grantmakers for Effective Organizations, overseeing content development for GEO conferences, publications, peer learning and other programming. The GEO community makes the difference between grantmaking as usual and transformational change. With more than 5,000 member grantmakers across the globe, we work together to lift up the grantmaking practices that matter most to nonprofits and that truly improve philanthropy. From 2011-2013, Meghan led implementation of the Scaling What Works initiative at GEO as Manager of Special Initiatives. Meghan has twenty years of experience in the philanthropic/nonprofit sector. Prior to joining GEO, Meghan served as Director of Special Projects for San Diego Grantmakers and also served on several foundation grants committees. Before moving to California, Meghan was Development Director at a national nonprofit LGBT health organization. She has also worked in fundraising and outreach for the Victory Fund and the Feminist Majority Foundation, and as a consultant specializing in writing and research for several other community organizations. Additionally, Meghan has taught sociology and LGBT studies as an adjunct faculty member at the University of Maryland. Meghan currently serves on the Fund the People Advisory Council and the LearnPhilanthropy Advisory Board. She earned her master's in sociology at the University of California San Diego and holds a bachelor's degree in English from the University of Maryland.

Katie Eyes /// Senior Program Officer /// Blue Cross and Blue Shield of North Carolina Foundation

Katie Eyes is a Senior Program Officer at the Blue Cross and Blue Shield of North Carolina Foundation. She works closely with grantees and stakeholders in the Foundation's priority area of health care as well as the emerging priority to support upstream and community-centered approaches to health. As a result of her work at the Foundation, Katie has developed a deep interest and commitment to improving the oral health system. Known on her team as "the maximizer," Katie regrets her senior comps project at Carleton College almost daily when she thinks of new and more useful research questions and in retrospect should have sought an MPH rather than an MSW at the University of Michigan. When she's not busy envisioning the many ways we could improve our oral health system, Katie enjoys spending time with her two young kids who inspire her with their curiosity and candor.

Eric Frazier /// Digital Strategist /// The Duke Endowment

Eric Frazier joined The Duke Endowment in 2017 after nearly three decades in journalism, starting at The Charleston Post and Courier and ending at The Charlotte Observer, where he reported on everything from philanthropy and child welfare to education and digital media. He served as the Observer's associate editorial page editor in his last two years.

Laura Gerald /// President /// Kate B. Reynolds Charitable Trust

Dr. Laura Gerald is president of the Kate B. Reynolds Charitable Trust. A pediatrician who was born and raised in rural North Carolina, Dr. Gerald joined the Trust in 2016 and brings decades of leadership experience across sectors to the foundation. Dr. Gerald served as the North Carolina State Health Director and Director of the Division of Public Health; executive director of the North Carolina Health and Wellness Trust Fund Commission; and market medical director for Evolent Health. She holds a bachelor's degree from Harvard and Radcliffe Colleges, a medical degree from Johns Hopkins School of Medicine, and a Master of Public Health degree from Harvard University School of Public Health.



Bobbi Haggood /// Trustee /// Prentice Foundation, Educational Foundation of America

Bobbi is a nonprofit strategist who has spent the majority of her professional life working on organizational planning, fundraising, philanthropic leadership and board governance. Bobbi has served as executive director of the North Carolina Network of Grantmakers, communications and development director for the North Carolina Center for Child and Family Health, and as program director for Voices & Choices of the Central Carolinas. Additionally she has consulted for various non-profits, foundations, and networking organizations. In her volunteer time that often feels like full time, Bobbi serves on the Board of Directors of the Educational Foundation of America, currently serving as board president. She also serves on the Advisory Board of the Chapel Hill Carrboro Youth Forward, the Advisory Council of the National Center for Family Philanthropy, the Advisory Board for the UNC Playmakers Repertory Company, and the President's Council for the North Carolina Coastal Federation. She is also a volunteer with the Blue Ribbon Mentor Advocate Program and the Executive Service Corp of the Triangle. Bobbi earned her bachelor's degree in environmental biology and management from the University of California, Davis. She also holds a master's degree in environmental management from Duke University.

Mary Alice Holley /// Communications and Marketing Director /// Conservation Trust for North Carolina

Mary Alice Holley joined the Conservation Trust for North Carolina in 2016 as the Communications and Marketing Director where she leads the effort to build greater public awareness for land trusts and connect North Carolina communities to the benefits of conservation. For more than 25 years, CTNC has helped save the places you love – streams, forests, farms, scenic vistas, wildlife habitat, parks, and trails. CTNC protects natural areas along the Blue Ridge Parkway, assists 22 local land trusts, and connects North Carolinians from all walks of life to the outdoors.

Jeanne Metzger /// Chief Development & Marketing Officer /// Exponent Philanthropy

Jeanne leads Exponent Philanthropy's development, marketing and membership efforts and is a member of the organization's leadership team. She is keenly focused on maximizing Exponent Philanthropy's resources, expanding its reach, and elevating its position within the philanthropic sector. Prior to joining Exponent Philanthropy, Jeanne served in a variety of management roles at the National Venture Capital Association where she launched a social entrepreneurship initiative and helped build the Association's membership, public relations, marketing, and non-dues revenue functions. Jeanne is excited about the changing landscape of philanthropy and the blurring line between for-profit organizations and the social innovation sector. During her free time, she enjoys spending time with her family, friends and logging miles on her bike.

Tamir Novotny /// Executive Director /// Emerging Practitioners in Philanthropy

Tamir became Executive Director of Emerging Practitioners in Philanthropy (EPIP) in 2015, following a three-year engagement with the organization. Starting as a chapter leader in New York, Tamir went on to join EPIP's national team, supporting chapters in the Northeast and advising the national leadership. Prior to his appointment, Tamir held multiple positions over nine years at Living Cities, a philanthropic collaborative focused on improving the lives of low-income urban residents. There, he developed and led portfolios in areas including housing, smart growth, and civic technology. Most recently, Tamir developed and launched the City Accelerator, a \$3,000,000 initiative to speed the spread of municipal innovation, and the Civic Tech and Data Collaborative, a partnership to harness the power of technology and data to address issues like criminal justice and youth employment. Tamir received a Masters in Public Administration from New York University in 2008 and a BA, magna cum laude from NYU in Metropolitan Studies in 2006.



Speaker Biographies

Jeff Pruett /// Chronic Pain Coordinator /// Partnership for Community Care

Jeff Pruett is originally from Guilford County but spent a number of years in the Army where he worked as a Mental Health Tech. and gained experience in hospital social work, family violence, and combat stress/PTSD. While on active duty Jeff completed his B/S degree which gained him a position as a Child Protective Service Supervisor once he transitioned from active service to reserve status. Jeff was also Executive Director of a non-profit organization working with adults with mental and physical disabilities helping them gain independent living skills, job skills and job placement in the community. He was called back to active duty three times between 2003 and 2011 and deployed to Iraq and Afghanistan where he developed an interest in working with soldiers who were identified as self-medicating due to the mental emotional and physical pain due to combat exposure. Jeff also volunteered to be a member of the Ft. Bragg suicide prevention team due to the increased number of suicides army wide. In 2012 Jeff accepted the position as the Chronic Pain Program Specialist for Partnership for Community Care using the Project Lazarus model to educate the community on the dangers of prescription opioids with the goal of reducing the increased number of accidental overdoses and deaths seen in our communities over the past decade. Jeff retired from the Army Reserve in 2012, he and his wife Tisha live in Madison, NC.

Mebane Rash /// CEO and Editor-in-Chief /// Education NC and N.C. Center for Public Policy Research

Mebane Rash is CEO and editor-in-chief of EducationNC and the N.C. Center for Public Policy Research. After law school, she worked for Carolina Legal Assistance, a mental disability law project, before joining the nonpartisan N.C. Center for Public Policy Research as the policy analyst, and then the director of law and policy. She also served as an adjunct professor at the UNC School of Law and an attorney for the ACLU-NC. She graduated from the University of Virginia in 1990 and the UNC School of Law in 1993. At the UNC School of Law, she was a member of the North Carolina Law Review.

Shannon Ritchie /// Digital Communications Strategist

Shannon Ritchie is a policy wonk, tech lover, and humanitarian. She was most recently the Director of Digital and Innovation for the AJ Fletcher Foundation where she created a strong online presence, led digital projects for many of the foundation's grantees, and founded SpeakUp NC, a project to elevate public discourse using the expertise from nonprofit leaders. Previously, she co-founded The Vote Against Project and received a master's from Duke's Sanford School of Public Policy. She has also worked at City Year, Harvard Law School, and served as student body president at Wake Forest University. When she takes a break from the laptop, you'll find her savoring the outdoors, drinking copious amounts of coffee around Durham, and wrangling two spirited and wonderful children.

Tara McKenzie Sandercock /// Senior Vice-President, Foundation and Community Relations /// Community Foundation of Greater Greensboro

Tara McKenzie Sandercock is Senior Vice-President, Foundation and Community Relations, for the Community Foundation of Greater Greensboro. Since 1997, she has provided leadership for the Foundation's grantmaking programs, funding collaboratives, and community initiatives. She is a co-founder of the Building Stronger Neighborhoods Funders Collaborative, the Guilford Nonprofit Consortium, and the S.P.I.C.E. Grant program (Strengthening Parent Involvement in Children's Education). Prior to joining the Foundation, Tara served as director of education for the national Council on Foundations in Washington, DC. She holds her B.S. from Davis & Elkins College and her M.A. from UNC-CH.



Virgil Smith /// Trustee /// Z. Smith Reynolds Foundation

Virgil Smith earned his Bachelor of Science and Master's degree from the University of San Francisco and received a PhD from UNC Asheville. Smith has a long career as a media executive. Having spent 20 years with McClatchy Newspapers and 24 years with Gannett, where he served numerous roles, including president and publisher and corporate HR executive. Smith retired from Gannett in October 2015 and currently serves as a leadership consultant. He is a longtime Trustee for the Z. Smith Reynolds Foundation.

Jessica Stanford /// Demographic Analyst /// Carolina Demography at the Carolina Population Center UNC-Chapel Hill

Jessica Stanford is a Demographic Analyst with Carolina Demography at the Carolina Population Center at UNC-Chapel Hill. She has a strong technical background in Geographic Information Systems (GIS), and her research interests focus on sustainable development, especially in the field of agriculture and food systems. Prior to joining Carolina Demography, Ms. Stanford was a lead member of an assessment entitled 'Harrisonburg EATs (Everyone at the Table)', where she conducted an analysis of the local food economy in Harrisonburg, VA. Ms. Stanford earned her BS degree in Geographic Science at James Madison University, with concentrations in Applied GIS and Environmental Conservation and Sustainable Development.

Rebecca Tippett /// Founding Director /// Carolina Demography at the Carolina Population Center UNC-Chapel Hill

Dr. Rebecca Tippett is the founding Director of Carolina Demography at the Carolina Population Center at UNC-Chapel Hill which started in 2013. With more than a decade of experience analyzing demographic and economic data, she has spent the last 7 years translating research into specific, usable information and knowledge to inform decision-making, evaluation, and policy. At Carolina Demography, she helps North Carolina government and business leaders understand and anticipate how population change affects them and their organizations. A transplant to North Carolina from the Midwest, she earned her BA in Sociology and Political Science from The Ohio State University and her MA and PhD in Sociology from Duke University.

Joy Vermillion Heinson /// Assistant Director /// Z. Smith Reynolds Foundation

Joy Vermillion Heinson is assistant director for the Z. Smith Reynolds Foundation. A native North Carolinian, Joy received a BA in Politics from Wake Forest University and an MPA from Harvard University's John F. Kennedy School of Government. The Kennedy School named her a Lucius N. Littauer Fellow for her academic achievement and contributions to the school. After internships in the NC Governor's Office and The White House, Joy began working with the Z. Smith Reynolds Foundation in 1998 and currently serves as the Assistant Director. She is a "20 Under 40" award recipient of the Winston-Salem Chamber of Commerce, a former Hull Fellow of the Southeastern Council of Foundations, and a Leadership NC alumna. Joy's previous board service includes: the Board of Trustees and Board of Visitors of Wake Forest University, the Funders' Committee for Civic Participation, the Environmental Grantmakers Association, and EdNC. She was also a founding member of the boards of the NC Network of Grantmakers, NC Center for Afterschool Programs, and NC Civic Education Consortium. Joy resides in Winston-Salem with her husband Ben, their two young children, and one old, sweet dog.



Registration and Hotel Information

For our planning purposes, please indicate on the registration form which sessions you would like to attend. The final registration deadline is February 20th. Non-NCNG grantmakers may attend the Annual Meeting, but must pay a registration surcharge. If you have any questions about your registration, please call NCNG at 919.578.6437 or email tsmall@ncgrantmakers.org.

Early Registration and Group Registration //

Take advantage of our available 15% discount by registering early! Early Bird registration discounts end on January 12th. Group registrations may be invoiced together for one single payment from your foundation if desired.

Payment Information

You may register online at www.ncgrantmakers.org/Events/2018-Annual-Meeting-and-Conference. You may also register by filling out this form, and mailing it and your check to NCNG. Checks should be made payable to NCNG/NCCF, please remit to:

North Carolina Network of Grantmakers
3737 Glenwood Ave. Suite 460
Raleigh, NC 27612



Hotel Information

We recommend reserving a room early, given that other large events may be scheduled for the same time period in Winston-Salem.

Winston-Salem Downtown Marriott

Special rate of \$159 per night, available through January 29th
425 N. Cherry Street
Winston-Salem, NC 27101
Tel: 336.725.3500, mention "North Carolina Network of Grantmakers"

Embassy Suites Downtown Winston-Salem

Special Rate of \$169 per night, available through January 29th
460 N. Cherry Street
Winston-Salem, NC 27101
Tel: 336.724.2300, mention "North Carolina Network of Grantmakers"

Dietary or Special Needs

We want everyone to be able to fully participate in the Annual Meeting. If you have a disability and need accommodations, check the box on the next page, and someone from our team will reach out to you ASAP! If you have dietary restrictions, please list them on the next page, or inform an NCNG staff member.



2018 Annual Meeting Registration Form

Please complete separate forms for each attendee. If you need to cancel your registration prior to **February 20th**, your registration will be refunded, less a \$50 administrative fee. **No refunds will be issued after February 20th.**

Full Name	Title	
Organization		
Address		
City	State	Zip
Phone	Email Address	

First Time Attendee?

Day One - Wednesday, February 28

Wednesday Workshops (select one)

- Community Foundations Workshop
- Education Funders Workshop
- Health Funders Roundtable

Afternoon Concurrent Sessions (select one)

- Fortify Your Donor Relations (Community Foundations)
- Legal Update: What's Next in Washington and Raleigh for Grantmakers
- Philanthropy at the Intersection of LGBTQ+ Issues
- Thank You for Being A Friend: Fostering Grantee Inclusion
- The 10 Minute Impact Assessment: A Framework for Discussing Your Philanthropic Impact

Late Afternoon Concurrent Sessions (select one)

- Board Circle (Foundation Board Members and Trustees)
- Don't Let your Data Get Dusty: Putting What You Learn to Use
- For Emerging Leaders: What's Wrong With This Picture? How to Identify and Address Issues of Inequity in Philanthropy
- The Opioid Crisis: Examining the Landscape and Addressing the Impact
- Symbiosis in Philanthropy: How Private and Community Foundations Can Work Together

Reception

Dinner Options (select one)

- Dine-Arounds
- On Your Own

Day Two - Thursday, March 1

Morning Concurrent Sessions (select one)

- As the South Grows: Lessons from NC and the Rural South
- Creating Messages that Unite and Don't Divide
- Read Between the Lines: Understanding a Nonprofit's Financial Story
- "You Have the Right to an Attorney...": Legal Aid Programs in North Carolina

Mid-Morning Concurrent Sessions (select one)

- As the South Grows: Nurturing our Practice
- Communicating in the Digital Age
- Evaluation That Supports Learning Together
- From K to Career: Understanding North Carolina's Education Continuum

Accommodations

Need Special Accomodations? Check here and someone from our team will contact you ASAP!

Dietary Needs: _____

Registration Cost

Day One and Two, Feb 28- Mar 1	\$260	\$ _____
Day One Only, Feb 28	\$160	\$ _____
Day Two Only, Mar 1	\$160	\$ _____
Subtotal		\$ _____
15% Early Discount (before 1/12/18)		\$ _____
NCNG Non-Member Surcharge	\$200	\$ _____
Total		\$ _____

North Carolina Network of Grantmakers

Connecting Grantmakers in every corner of North Carolina to:

Knowledge:

- Seminars
- Webinars
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- Research Support



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