



Carolinas  
Chapter

## CHAPTER NEWSLETTER - SEPTEMBER 2021

### ON THE BLOG

[Interview with Professional Development Scholarship Winner: Bridgette Holley, Hope International](#)



Hear from our 2021 Apra Carolinas Professional Development Scholarship winner, **Bridgette Holley**, about how she used her scholarship to purchase recorded sessions from Apra University and the **PD2020 Virtual Conference**.

### APRA CAROLINAS 2021 CHAPTER AWARDS

We want to say a big **THANK YOU** to everyone who submitted nominations for this year's **Apra Carolinas Chapter Awards!**

Winners will be announced during our post-conference Coffee Chat on 10/29.

*(Don't forget to register for the **Virtual Fall Conference** - and Coffee Chat - using the links below!)*



## **DON'T FORGET: MEMBERSHIP SCHOLARSHIP**

Our Membership Scholarship is still accepting applications throughout the year! As an active member of Apra Carolinas you'll gain access to loads of resources, free webinars and networking opportunities.

*(And, psst! Many of our upcoming webinars and **VIRTUAL FALL CONFERENCE** are FREE for members and only available by paid registration for non-members.)*



LEARN MORE &  
APPLY HERE



Are you interested in presenting at a conference next year? What about hosting a webinar?

## **FOLLOW US**

Follow us on **LinkedIn** and **Twitter** for conference updates, webinar announcements, blog posts, job postings and educational opportunities from all over the Apra community.



# UPCOMING EVENTS



**When:** 9/28/2021  
1:00PM - 2:00PM EST  
**Where:** Virtual  
**Cost:** *FREE* with code  
for Apra Carolinas  
members

**JOIN THE  
CONVERSATION**

## **APRA MID-ATLANTIC INTERNATIONAL PROSPECTING PANEL**

### ***HAPPENING TOMORROW!***

Are you interested in learning more about international research? Wondering where to start and what resources are available? Curious about data privacy laws in other countries?

Join Apra Mid-Atlantic for a panel discussion, Q&A and leave with a resource list for international prospecting of donors, foundations and corporations!

*(Active Apra Carolinas members were sent a \*free\* registration code in an email. If you need a new one, please reach out at [apracarolinas@gmail.com](mailto:apracarolinas@gmail.com)!)*

# APRA CAROLINAS 2021 VIRTUAL FALL CONFERENCE



Join us for our 2021 Virtual Fall Conference being held throughout the month of October! We'll be hosting a conference session every Wednesday at 1PM EST, followed by a **Post-Conference Coffee Chat** on 10/29 where we'll discuss what we've learned and announce our **2021 Chapter Awards** winners.

## Sessions:

- 10/6: ***Making Technology Work for You (and Your Fundraisers) Panel Discussion***
- 10/13: ***What We Learned from 2020: Major Gifts & AI Webinar***
- 10/20: ***Using Excel for Data Visualization: Pivotal Tips for Prospect Development Webinar***
- 10/27: ***Private Company Valuation: Putting Together the Puzzle of Private Wealth Webinar***

**When:** Every Wednesday in October

**Where:** Virtual

**Cost:** *FREE* for members, **\$20 per session** for non-members

*(Psst - chapter membership is only \$35! New members get the rest of 2021 and a full year of membership in 2022 when they sign up through the end of the year!)*

**Each session will be recorded and emailed to all registrants with any slides or other materials presented during the presentation.**



**Rachael Walker**

*Moderator*

Speakers:

**Julian Heidelberg**

*Atrium Health Foundation*

**Emily Hinz**

*UNC Charlotte*

**Margaret Valyou**

*North Carolina State  
University*

## **Making Technology Work for You (and Your Fundraisers) Panel Discussion**

CRMs, databases, and other software are meant to make us more efficient, to facilitate collaboration, and to empower fundraisers to perform their own prospect management tasks. In short: they should make our jobs easier. Sometimes, they do just that - and sometimes, we need a little help. Join our panel with a wide range of experience in industries and software to learn about how they have put technology to its best use. Topics will include how to train and encourage fundraisers in the use of CRMs; tips and tricks for working in your CRMS; and how to fill in gaps in a CRM's functionality when all else fails.

**GRAB A SEAT**

## **What We Learned from 2020: Major Gifts & AI Webinar**

2020 presented several unique challenges and the philanthropy trends reported in Giving USA highlighted some dramatic changes, especially regarding major gifts. In this presentation, we will discuss with **DonorSearch** what we learned from 2020 as well as how the emerging technology, including AI, is most effective for analyzing this new data so that organizations are focused on the right donors. Attendees will walk away with new insights on philanthropy from 2020, an understanding of how AI works for prospect research strategies, and how to effectively implement it.



Speaker:

**Sarah TeDesco**  
*DonorSearch*

**SIGN ME UP**



Speakers:

**Max Dakin**  
*UNICEF USA*

**Nicole Wittlin**  
*Texas A&M University*

**REGISTER ME**

## **Using Excel for Data Visualization: Pivotal Tips for Prospect Development Webinar**

From reports and dashboards to presentations, data visualization is an essential tool for prospect development teams. Enterprise business intelligence tools are great, but you don't need a fancy platform to develop effective data visualizations. Excel is widely available and packed with features for data analysis and charting. Join Apra members Nicole Wittlin and Max Dakin – a.k.a. “The Scattered Plotters” – to learn tips for taking your Excel skills to the next level. This session will demonstrate end-to-end report development concepts from data collection and wrangling to design and distribution.

## Private Company Valuation: Putting Together the Puzzle of Private Wealth Webinar

Privately held companies are both a significant source of wealth and are a puzzle to figure out. Privately held means that they don't have to tell us what their profit and equity are. In this session we'll discuss tricks and tips on estimating the worth of a privately held company, along with likely net income. We'll also cover how to get clues on ownership.

SAVE A SPOT



Speaker:

**Marianne Pelletier**  
*Staupell Analytics*

## APRA CAROLINAS POST-CONFERENCE COFFEE CHAT

Join your colleagues for a free networking event after the last session of our 2021 Virtual Fall Conference. Grab a cup of whatever you drink in the morning and let's cheer the 2021 Apra Carolinas Chapter Award winners! We will continue the networking as we discuss key takeaways from the conference - or any new project you have in the works this year.

**Eligible Coffee Chat attendees will be entered into a drawing to win a FREE 2022 Apra International membership - valued at \$240!**

- *Must be present at Coffee Chat to win*
- *Must be an active Apra Carolinas member*
- *Must have attended at least one Fall Conference session*



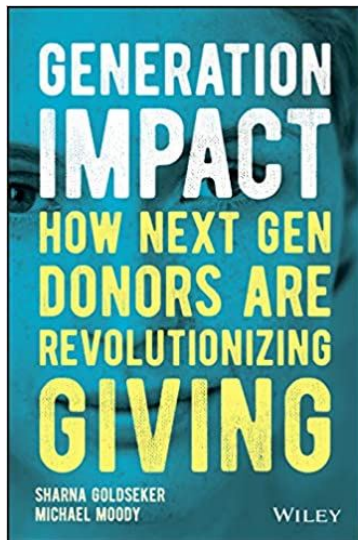


**When:** 10/29/2021  
9:00AM – 10:00AM  
**Location:** Zoom  
**Cost:** FREE

**REGISTER  
HERE**



## **APRA CAROLINAS BOOK DISCUSSION**



Join us for our **FINAL** book discussion of 2021!

We'll be reading "**Generation Impact: How Next Gen Donors are Revolutionizing Giving**" (336 pages) by Sharna Goldseker and Michael Moody. We'll be discovering how Gen X and Millennial donors are changing their approach to charitable giving to achieve greater impact. This should give us some great insight into the future of philanthropy, as well as some tools on how to engage and steward these next gen donors.

You can find this book at online retailers, bookstores, and your local library.

**When:** 12/15/2021  
11:00AM – 12:00PM  
**Location:** Zoom  
**Cost:** FREE

**SIGN ME UP**



