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**Spring 2018 Conference Schedule**April 12-13, 2018  
Elon University

**Thursday, April 12**:

4:30 – 5:30: Tour of [Loy Farm](https://www.elon.edu/u/academics/arts-and-sciences/center-for-environmental-studies/environmental-center-at-loy-farm/about/)

6:00 – 8:00: Networking Reception at [Cork & Cow](http://www.corkandcowburlington.com/); 3152 Walden Ln, Burlington, NC

**Friday, April 13**: (8:30 – 4:15) – Oaks 212

8:30 – 9:15: Registration, Breakfast, and Networking

9:15 – 9:30: Welcome Remarks

9:30 – 10:30: **SESSION 1** – Sarah Tedesco: Planned Gift vs. Major Gift Identification

10:30 – 11:30: **SESSION 2** – Daniel Ross: Key Metrics in Major Gift Fundraising

11:30 – 12:15: **SESSION 3** – April Purvis: Legislative Update – the 2017 Tax Cuts & Jobs Act

12:15 – 1:15: Lunch and Networking

1:15 – 2:00: **SESSION 4** – Natalie Spring: Prospect Management – No Reasonable Request Refused!

2:00 – 3:00: **SESSION 5** – Angie Stapleton: Crypto-philanthropy: Digital Currency in the Social Sector

3:00 – 4:00: **SESSION 6** – Panel Discussion: Career and Certification Options in Prospect Development

4:00 – 4:15: Closing Remarks

**Session Descriptions:**

**‘Planned Gift vs. Major Gift Identification’**

Major Gift Officers and Planned Giving Officers may work side by side and use the same list of prospects, but the prospects they're seeking are very different. This presentation will highlight the philanthropic and wealth factors that best identify planned giving prospects, and how those factors differ from major donors.

In this presentation we will cover:

* Ability to identify key characteristics for MG Prospects
* Ability to identify key characteristics for PG Prospects
* Understand the difference between MG and PG Prospects

#### Speaker

**Sarah Tedesco** from DonorSearch  
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**‘Key Metrics in Major Gifts Fundraising’**

Many major giving teams manage the wrong metrics. As a result they do not achieve the results they should. In particular, there is an over focus across the sector around fiscal year based activity metrics. While these can be useful, most prospects are indifferent about fiscal year and are cultivated across different time periods. This session highlights best practices in managing major giving teams to a set of metrics that include: ∙ Prospect pool size ∙ Pool penetration ∙ Prospect movement through stages ∙ Ask levels vs. expected values based on capacity and affinity ∙ Proposal close rates ∙ Revenue.

#### Speaker

**Daniel Ross** from ADVIZOR Solutions, Inc. \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
**‘Prospect Management – No Reasonable Request Refused!’**

Duke University uses a team-based approach to prospect management that fosters collaborations between fundraisers across centralized and decentralized units to create a donor-centric experience for our alumni, friends, and parents. This year, the office of prospect management flipped the script to create a fundraiser-centric approach to prospect management. Learn how we have increased fundraiser engagement and utilization of prospect management services by assuming that requests are reasonable and helping fundraisers get the information they need.

#### Speaker

**Natalie Spring** from Duke University  
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**‘Legislative Update – the 2017 Tax Cuts & Jobs Act’**

This presentation details some of the aspects of the 2017 federal tax reform legislation most effecting charitable organizations. Those items include doubling of the standard deduction, the repeal of the 80/20 athletic seating rule, and an endowment excise tax on the largest private endowments.

#### Speaker

**April Purvis** from Clemson University

**‘Crypto-philanthropy: Digital Currency in the Social Sector**

This session will look at the rise of digital currencies, such as Bitcoin, and their potential impact on the social sector. We will explore the history of digital currency, current uses of cryptocurrency and blockchain in the social sector, and the best ways to equip your nonprofit for an increasingly digital landscape.

#### Speaker

**Angie Stapleton** from The Helen Brown Group

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**Panel Discussion: Career and Certification Options in Prospect Development**

Join us for a discussion and Q&A about career and continuing education opportunities in the prospect development field. Hear what alums of different programs think about how their education prepared them for the profession and learn more about what opportunities are available to advance your career and learn new skills.

#### Speakers

**Moderator: Beth Inman** from JDRF. Panelists: **Rachael Walker** (MLIS) from the UNC System; **John Bratton** (MPA) from UNC-Greensboro; **Rikki Bryant** (CFRE) from The Medical Foundation of North Carolina; **Greg Duyck** from the Aspen Leadership Group