



**BRUCE W. FLESSNER** is a principal at Bentz Whaley Flessner, an international fundraising consulting firm serving colleges, universities and major medical centers in Asia, Europe and North America. During his 30 years of consulting experience, he has served clients such as Baylor University, Clemson University, Michigan State University, University of California–Los Angeles, University of California San Diego, University of Chicago, University of Michigan, University of Minnesota, University of Sydney, and many others.

Mr. Flessner is a recognized expert on new wealth philanthropy and has been quoted in the *New York Times*, *Washington Post*, *Wall Street Journal*, *LA Times*, *Star Tribune*, *Dallas Star*, *Detroit Free Press*, *Chronicle of Philanthropy*, *Chronicle of Higher Education* and many other major newspapers. He has served on the board of directors of the Council on Foundation's New Ventures in Philanthropy. He is a frequent speaker at CASE, AFP, AHP, and other professional association conferences and was the first male to serve on the council of the Women's Philanthropy Institute.



**AMY BRONSON** is Executive Director of Advancement Resources and Strategic Talent Management at Boston University, where she is engaged in building and sustaining an outstanding team of advancement professionals who are undertaking an enormous challenge: the first comprehensive campaign in the history of the University. Amy oversees the talent management program for a staff of 200 including seventeen schools and colleges at the University. Encompassing talent acquisition, organizational and learning development, human resource management, finance and administration, Amy partners with colleagues across the University to ensure the advancement team is ready to meet the campaign challenge.

Prior to joining BU in September 2010, Amy led the strategic staffing initiative for the *Light the World* Campaign at Boston College. Before joining BC in 2005, Amy was at Harvard Law School where her many roles included managing special events; curriculum planning and program administration for executive legal education and as a fundraiser and administrator at Baker House Alumni Center. Her prior experience includes working for Tiffany & Co. in Chicago and Houston and teaching in Athens, Greece. With over 20 years of advancement experience, Amy has served in leadership roles and presented at numerous conferences, most recently serving as co-chair for the 2015 CASE Strategic Management Conference and chairing the Emerging Leaders track for the Council of Advancement and Support of Education (CASE) District I Conference in 2015. In 2012, her chapter, *Investing in Platinum Staff* appeared in "Effective Measures" by Jon Derek Croteau. She is excited to be at the forefront of talent management in the not for profit sector.

## SCHEDULED SPEAKERS



**COREY D. B. WALKER, PH.D.** is Dean of the College of Arts, Sciences, Business and Education and John W. and Anna Hodgins Hanes Professor of the Humanities at Winston-Salem State University. Dean Walker is the academic leader for the largest academic unit of the university consisting of nineteen academic departments, over 250 faculty, five research and teaching centers as well as the University's signature Diggs Art Gallery. Previously, he served as Chair of the Department of Africana Studies at Brown University. He also served as Director of the Center for the Study of Local Knowledge and as a member of the faculty in the Department of Religious Studies and the Carter G. Woodson Institute for African and African American Studies at the University of Virginia. He has lectured before academic audiences in the United States, the Caribbean, South America, Europe, and Africa.

Dean Walker is the author of *A Noble Fight: African American Freemasonry and the Struggle for Democracy in America* (University of Illinois Press, 2008) and has recently completed the manuscript for his next book entitled *Between Transcendence and History: An Essay on Religion and the Future of Democracy in America*. He is editor of the special issue of the journal *Political Theology* on "Theology and Democratic Futures," Associate Editor of the award winning *SAGE Encyclopedia of Identity*, published numerous book chapters and his articles and essays have appeared in such journals as *Amerikastudien/American Studies*, *boundary 2*, *Cahiers Charles V*, *C.L.R. James Review*, *Journal of the American Academy of Religion*, and *South Atlantic Quarterly*. Dean Walker co-directed and co-produced the documentary film *fifeville* with acclaimed artist and filmmaker Kevin Jerome Everson.

Dean Walker has long been involved in civic affairs including serving as Vice Rector of the Board of Visitors of Norfolk State University and as member of the Workforce 2000 Advocacy Council. He currently serves as a member of the Winston-Salem Community Innovation Lab, Board of Trustees for the Arts Council of Winston-Salem and Forsyth County, Advisory Board of the Flywheel Foundation, Board of Directors of the Southeastern Center for Contemporary Art (SECCA), Board of Directors of the RiverRun International Film Festival, and National Advisory Board of the Middle Passage Ceremonies and Port Markers Project. He has appeared on a variety of radio and television shows and serves as guest commentator for a number of media outlets in the United States and abroad.



**DAN GERLACH** has served as president of the Golden LEAF Foundation since 2008. Since its inception, the Foundation has awarded 1,360 grants totaling more than \$597 million to 501(c)(3) nonprofits and governmental entities. Dan joined the foundation in October 2008. After working as a budget analyst for the New York State Assembly for 5 years, Gerlach spent 7 years as the director of the NC Budget and Tax Center and 7 years as the Senior Fiscal Advisor for Gov. Easley. He formerly served on the NC Network of Grantmakers Board of Directors and currently is actively involved in his church.

Dan holds a M.P.A. in state and local public finance from the Maxwell School of Syracuse University and bachelor's degrees in economics and English from the University of Notre Dame. He has served as an adjunct instructor of public administration at UNC-Chapel Hill and NCSU.

## SCHEDULED SPEAKERS



**ELIZABETH AYERS** is Executive Director of Gift Planning at The University of North Carolina at Chapel Hill. She currently serves on the Partnership for Philanthropic Planning National Board and the Board of the North Carolina Planned Giving Council. Prior to joining UNC in 2008 she worked at The Ohio State University, where she served as Director of Planned Giving for the Medical Center and Associate Director of Planned Giving for the University. She has worked for the Columbus Foundation, served on non-profit boards and committees and was president of Central Ohio Planned Giving Council in 2007.

Ayers has presented on various charitable topics at local and national conferences including AAMC, NCPG and Wealth Counsel. In 2014, she presented at the North Carolina Community College Fundraisers' state conference and AFP North Carolina state conference.

She has practiced law in the areas of estate planning and civil litigation. She holds a JD from Capital University, M. M. from Ohio University, and a B. M. from Wittenberg University.



**HOLLY CHATHAM** is a Director of Strategic Research and a national meeting speaker with the research programs at the Education Advisory Board (EAB). Dr. Chatham brings deep experience in higher and secondary education from her previous roles. Most recently, she held a position in both the School of Music and Institute of Sacred Music at Yale University, where she taught students in a highly selective Master's program. Prior to her position at Yale, she taught at Rutgers University and was Director of Music at Marymount School New York, where she developed a new school-wide music curriculum and an extracurricular program in the arts. In addition to her work in education, she was Director of Music at Christ Church in Summit, N.J., where she developed a community-serving concert series and was awarded three grants from the National Endowment for the Arts. She has also worked as a commodities broker in New York.

Alongside her academic and administrative career, Dr. Chatham was a concert pianist and harpsichordist, performing throughout the U.S., U.K. and Mexico, including Carnegie Hall and Lincoln Center in New York. She holds a doctorate from Rutgers University, a master's degree from Indiana University, an undergraduate degree from Clayton State University, and a Series 3 Commodities and Futures license from FINRA.



**GEOFF GRAHAM** is Associate Vice Chancellor for Development and Real Estate Management at Appalachian State University. He supports various areas of development at Appalachian, including oversight of its Office of Gift Planning. A member of the North Carolina State Bar, Geoff practiced law in Boone from 1993-1997 before joining the Development Office and Gift Planning at ASU. During his development career he also served as an Assistant Director of Planned Giving at the University of North Carolina – Chapel Hill. Geoff is a past president (and current member) of the North Carolina Planned Giving Council and member of the national Partnership for Philanthropic Planning.

## SCHEDULED SPEAKERS



**GREG ABEYOUNIS** is Associate Vice Chancellor for Development at East Carolina University. Responsibilities include: Working with the East Carolina University Foundation, Inc., the East Carolina University Medical & Health Sciences Foundation, Inc., East Carolina Alumni Association and the East Carolina University Educational Foundation, Inc. (Pirate Club) with all estate planning gifts. Greg also oversees and leads the ECU Annual Giving Program, which works across the ECU Foundation, Inc. the ECU Medical & Health Sciences Inc. Greg's team sets the strategy and distributes all forms of centralized annual giving that include solicitations via phone, direct mail, electronic channels, social media and crowdfunding for alumni, friends, faculty and staff and various constituent groups that support ECU annually.



**GREGORY C. HAIRSTON** is a 1983 graduate of Winston Salem State University. His additional academic experience includes graduate study at UNC Chapel Hill and North Carolina A & T State University. His professional training is highlighted by his Certificate in Fund Raising Management from The Center on Philanthropy at Indiana University.

Gregory has spent the majority of his professional career at his alma mater with approximately 20 years in Advancement. During his tenure as Director of Alumni Relations he has been able to realize some significant achievements including initiating the Alumni Achiever program for the purpose of alumni recognition and developing the Young Alumni Council for targeted outreach, engagement and solicitation purposes. Gregory played a significant role in the university receiving the CASE Circle of Excellence Award for Educational Fund Raising. This designation was based on the significant increases achieved in alumni giving.



**JENNY JONES** is the Executive Director of Alumni Affairs at the University of North Carolina at Charlotte.

Prior to her current role, Jenny served as the Director of Alumni Affairs for the Duke University School of Medicine. From 2002 – 2008 she served as Duke Medicine's Director for Special Events and Donor Relations. Jenny began her professional career in Student Affairs, working in Residence Life at Appalachian State University and Western Carolina University before moving to the University of Kentucky where she was Assistant Director for Student Activities. In her role at UK, Jenny advised Student Activities Board committee chairs for the Cinema, Spotlight Jazz, Homecoming and Visual Arts committees; negotiated contracts for major artists; created publicity pieces; and worked all major events sponsored through Student Affairs. Jenny moved into Alumni Affairs at the University of Kentucky when she took on the role of Special Programs Coordinator for the Alumni Association, handling all special events for the Association. She was promoted to the position of Associate Director for Membership, Marketing and Special Programs. In this role she worked with alumni clubs across the country as well as supervising membership/marketing and all special events for the Association.

Jenny also serves as a principal consultant for The Donor Relations Guru Group, a dynamic team of seven thought leaders providing consulting and program assessment for donor relations, alumni relations, events, advancement operations and organizational leadership and structure.



## SCHEDULED SPEAKERS

Jenny earned her Bachelor's degree in secondary education and history with a minor in music, as well as a Master's degree in education administration from Appalachian State University. She is currently working towards her doctorate in educational policy studies at the University of North Carolina, Greensboro.



**LAMONICA SLOAN** is currently serves as the Director of Career Development Services at Winston-Salem State University. In this role, she oversees employer relations, student employment and volunteer services. Lamonica advises students and employers on hiring trends, the job search and career options. With over 17 years of experience in higher education, she has spearheaded a transformation of career development offerings, with an emphasis on employer engagement, earlier student interaction, student preparation, and more opportunities for students to explore and develop.

Since 1998, Lamonica has worked for the University where her jobs have included Job Location & Development Coordinator, Freshman Seminar Instructor/Advisor, and Assistant Director of Career Services and Cooperative Education, among others. While at the University, she has served as President of the WSSU Staff Senate and Vice-Chair of the UNC Staff Assembly. She is a member of the National Association of Colleges and Employers (NACE), the National Career Development Association (NCDA) and the National Association of Student Personnel Administrators (NASPA). She holds a bachelor's degree from Winston-Salem State University and a master's degree from North Carolina Agricultural and Technical State University.



**MARY ELIZABETH ENTWISTLE** creates marketing and communications plans for higher education institutions non-profit organizations as Development Communications Specialist at The Gift Development Group. Using web, photography, video, social strategies for capital campaigns, annual funds and fundraising development special projects.

Mary Elizabeth has experience in capital campaign communications, alumni affairs and non-profit marketing strategy. She has worked with UNC system programs and local non-profits to successful execute campaign communication strategies and create engaging content for alumni and donors.

Mary Elizabeth earned her B.A. in Journalism and Mass Communication from The University of North Carolina at Chapel Hill.



**NATHAN HARLAN** serves as Director of Corporate and Foundation Relations at Winston-Salem State University. In this role, he helps the university develop and enhance partnerships with corporations and foundations who support and invest in WSSU students and the university's strategic priorities. Prior to joining WSSU in 2014, Nathan directed fundraising initiatives for regional and national nonprofit organizations including Mountain BizWorks – a community development institution that helps start and grow small businesses in Western North Carolina, the National Wild Turkey Federation, and the Land Trust Alliance. Nathan is a Kentucky native and a graduate of Western Kentucky University.

## SCHEDULED SPEAKERS



**SHAYNA LONG** is the assistant director of annual giving at UNC Charlotte where she focuses on digital fundraising. She manages a variety of initiatives, including crowdfunding, #GivingTuesday, student philanthropy, and giving days. She works closely with the director of annual giving to execute a multi-channel fundraising program. Shayna began her career at the University as a member of the stewardship team in 2014. She holds a bachelor's degree in arts administration from University of Kentucky and a master's degree in arts administration from Savannah College of Art and Design. Originally from West Virginia, she enjoys traveling, yoga, art, and hiking with her goldendoodle.



**TONYA TAYLOR** is Principal and Executive Consultant at The Gift Development Group, where she leads a team of strategists on fundraising and development projects. Her work focuses on capital campaigns, strategic brand development and communications for higher education institutions and non-profit organizations.

Tonya's most recently served as the Executive Campaign Director for the UNC Chapel Hill-Medical Foundation Horizons Program and the Interim Director of Corporations and Foundations for the School of Public Health. Prior to that, Tonya held an Executive Campaign Director position for the University of North Carolina Newman Center in Chapel Hill, where she led a multi-million dollar campus facility expansion effort.

As a community advocate, she has served on a number of Boards and Executive including the Boys and Girls Club of Chapel Hill, YMCA of Greater Rochester, Wilson Commencement Park, and Jack and Jill (Rochester and Durham Chapters). Most recently, she led the effort to open Rochester, New York's first all-girls Charter School in collaboration with philanthropists and education leaders throughout the country. She has held board positions on The Rochester Association of Black Journalists and Volunteers of America of Western New York Boards, and currently sits on the White House Committee for African American Engagement. Tonya has also been a presenter for the Association of Fundraising Professionals and the Association of Healthcare Philanthropy.

Tonya earned her B.A. in Communications and Journalism from Elon University and her M.A. in Communications from New York University.



**WILL SPIVEY** is the President, Excalibur Direct Marketing. For the last 25 years Will has provided strategic marketing counsel to a wide range of organizations, from the Fortune 50 to start-ups. In 1999, Will founded Maxim Direct, a full-service direct marketing agency, which he grew to be among the largest direct marketing agencies in the Southeast. His firm was twice recognized with the industry's highest honor, the International ECHO Award. After selling his company in 2010 Will started Maxcom Creative Thinking where he served as an advisor to CEOs and CMOs wrestling with the issues of marketing change management. He joined Excalibur as President in 2015.

## SCHEDULED SPEAKERS

A nationally recognized leader in marketing strategy and communications, Spivey has served on numerous industry committees, including the International ECHO judging and Marketer of the Year committees and on the leadership team for the Business Community on Creativity for the state of North Carolina. He was also a founding board member for The Center for Creative Economy. Spivey has been tapped as an expert commentator by publications ranging from American Banker to Direct Marketing News. He also is a frequent speaker at universities, industry conferences and seminars. Spivey recently co-developed and taught a new course at Wake Forest University for the undergraduate and the M.A. programs, Marketing Analytics.

Will earned his MBA from Duke University and holds BA and BS degrees from Berea College.



**KIMBERLY FAIR-REESE** is a 20-year veteran in higher education administration. She is a proud graduate of Winston-Salem State University, and Indiana/Purdue University's School of Philanthropy (IUPUI) achieving her certification in fundraising management. As the Director of Annual Fund for WSSU, Kimberly is responsible for the development and implementation of all annual fundraising initiatives with the pursuit of supporting the University's mission and goals. Kimberly has served Winston-Salem State University in many other roles throughout her time there as the Assistant Director of Admissions and Assistant Director of Career Services & Experiential Learning. During her tenure in the Advancement Division, she has assisted WSSU's ongoing fundraising efforts to increase by more than 50%. As a senior fundraising professional on the team for 16 years, Winston-Salem State University has been the recipient of Three Circle of Excellence Awards for Sustaining Educational Fundraising from the Council for Advancement and Support of Education (CASE). Additionally, Kimberly has served as a panelist and speaker for the NCAA First Team Athletic Conference, CASE District III Conferences and many other higher education events.



**CYNTHIA BUTLER** oversees annual giving, gift planning, major gifts and stewardship. She also serves as a key liaison with development officers in schools and units across campus.

Butler, who joined the development office in May 2014, came to Carolina from the University of Florida, where she served in various key development and leadership roles for 13 years. Before UF, Butler worked at Wright State University in Dayton, Ohio, where she earned her bachelor's degree in communications. She and her husband, Jack, have three children and three grandchildren.

## SCHEDULED SPEAKERS



**RACHAEL DIETRICH WALKER** is the Prospect Development Manager at UNC General Administration, in charge of the shared services program to provide prospect research support to the UNC system's emerging campuses. Rachael has been in prospect research for more than five years and learns something new every day. She is an alumna of the UNC system, having earned her MLIS from UNC-Greensboro in 2013, and earned her undergraduate degree from the University of Richmond.



**JUAN AUSTIN** is the senior vice president government and community relations, Wells Fargo Foundation, overseeing all corporate philanthropy and employee involvement activities in North Carolina and South Carolina (Exception: Greater Charlotte Region). Austin's primary focus is delivering strategic and brand/reputation building corporate philanthropy. Areas of emphasis include consulting, strategic analysis, training, budgeting, forecasting and proposal review & approvals.

Since joining Wachovia in 1986, Austin has gained experience in several areas of the bank including dealer finance, retail, business banking, community lending & investment, commercial and wealth management.

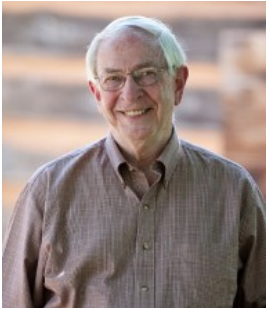


**CARLETTA SIMMONS** serves as the Director of Annual Giving at North Carolina Agricultural and Technical State University (N.C. A&T), where she is responsible for soliciting the university's alumni, faculty, staff, friends, students and their families for annual gifts. Prior to joining N.C. A&T, she worked in the Annual Giving Offices at North Carolina Central University (NCCU) and the University of North Carolina at Greensboro (UNCG), where she earned her undergraduate degree. Carletta is expecting her master's degree in Nonprofit Management from the University of Central Florida (UCF) in December.

An active member of her community, Carletta is a board member at the Women's Resource Center of Greensboro and is a founding member of *Club Red*, the young professional group with the Greensboro Chapter of the American Red Cross. She also serves as a volunteer for various other organizations throughout her community and mentors college-bound students helping them reach their personal, academic, and career goals. In addition to helping others, Carletta enjoys traveling, reading, spending time with family and friends, and watching sports.



## SCHEDULED SPEAKERS



**TOM LAMBETH** is Director Emeritus at the Z. Smith Reynolds Foundation where he served as Executive Director from 1978 until 2001. He was born in Clayton, NC and was educated in the public schools of High Point, Thomasville, Washington (NC) and Statesville and graduated from the University of North Carolina in 1957 with a degree in history; served as a member of the Military Police Corps of the US Army Reserve and worked as a newspaper reporter. He served as chief of staff for Governor Terry Sanford and Congressman Richardson Preyer and as a member of the staff of the Smith Richardson Foundation.

Tom briefly was Director of the US House committee investigating the assassinations of President Kennedy and Dr. Martin Luther King. He has been chair and member of the Board of Trustees of his Alma Mater and the University has honored him with a Distinguished Alumnus Award, the Davie Award, an Alumni Association Distinguished Service Award and an Honorary Doctor of Laws Degree. He also holds honorary degrees from Wake Forest University and Pfeiffer College.

In 2000 UNC Greensboro awarded Tom the Mclver Award for Public Service and in 2001 the UNC System presented him with the University Award. In 2005 he received the North Carolina Award for Public Service. Tom received the 2013 Award of the North Caroliniana Society. He has served on a number of boards and commissions nationally and in North Carolina including the NC Humanities Council and the National Center for Family Philanthropy. Tom has received Lifetime Achievement awards from the North Carolina 4H and NC Action for Children. He served for some years as Chair of the Board of Sterling Capital Funds, The Lambeth Distinguished Professorship and the Lambeth Lecture in Public Policy have been established at the University of North Carolina in his honor.