

AGENDA

Friday, April 10, 2015

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8:30 - 9:30 am

Check-in

*Blumenthal Performing Arts
Knight Theatre Lobby
430 South Tryon Street*

Continental Breakfast

*Wells Fargo Auditorium Lobby
Sponsored by Patron Manager*



9:30 - 10:15 am

Welcome and 30-Second Success Stories

Wells Fargo Auditorium

10:15 - 11:00 am

Keynote Speaker: Charles Randolph-Wright

Wells Fargo Auditorium

Charles Randolph-Wright, a South Carolina native and Duke University graduate, has close ties to Charlotte's theatrical community as both an actor and a director, and will speak about the importance of musical theatre in his own life and journey, and offer a sneak peek at the new musical he is developing about Jim and Tammy Faye Bakker's PTL Club with Grammy-winning gospel duo BeBe and CeCe Winans. Charles has built a dynamic and diversified career in directing, writing and producing for film, television and theatre. Charles most recently directed *Motown the Musical* on Broadway, and is a resident playwright at Arena Stage's American Voices New Play Institute.

11:00 - 11:30 am

Networking Coffee Break

Wells Fargo Auditorium Lobby

11:30 am - 12:15 pm **Presentation: Issues Driving Charitable Activities Among Wealthy Households**
Wells Fargo Auditorium

Tom Lawson, Senior Vice President of Individual Investments and Philanthropic Solutions at U.S. Trust, Bank of America Corporation, will present on the findings of their [2014 Study of High Net Worth Philanthropy](#). This study presents new areas of research in order to gain a deeper understanding of the giving patterns of America's high net worth households.

A copy of this study is in your packet, and on our website linked from this agenda.

12:15 - 1:45 pm **Lunch**
Knight Theatre Lobby
Sponsored by R&H Theatricals



2:00 - 2:45 pm **Panel: A Word From Your Funders**
Wells Fargo Auditorium

Representatives from some of Charlotte's top corporate philanthropists will share their side of the funding story.

Moderated by Paige Price (Theatre Aspen), with Weston Andress (PNC Bank), Cynthia Forbes (UTC Aerospace Systems) and Matt Salisbury (BlackArch Partners).

2:45 - 3:30 pm **Panel: Communication Integration: One Patron, Many Needs**
Wells Fargo Auditorium

Most patrons just know your theatre; they don't see Development, Marketing, Artistic, Front-of-House.... How do you present a united message to your donors and use the entire experience of your theatre to make the case to give and ensure that donors feel special?

Moderated by Elisabeth Challener (ZACH Theatre), with Lindsay Anderson (TRG Arts), Kwofe Coleman (The MUNY), Robert Fleskes (Ticketmaster), Siobhan Morava (Lyric Theatre of Oklahoma), Elizabeth Sheets (Bechtler Museum of Modern Art) and Courtney Simms (The MUNY).

3:45 - 4:45 pm

Panel: Data-Driven Fundraising

Wells Fargo Auditorium

How organizations of all sizes and budgets can gather and use data to better reach and serve their donors.

Moderated by Tom Gabbard (Blumenthal Performing Arts), with Eugene Carr (Patron Technology), Lee Gallagher (Arts & Analytics), Wendy Oglesby (Blumenthal Performing Arts) and John Thew (Theatre Aspen).

4:45 - 5:30 pm

Case Study & Strategy Session: Community Engagement

Wells Fargo Auditorium

Keith Cromwell (Red Mountain Theatre Company) and Lisa Grele Barrie (North Carolina Theatre) will present case studies of their organizations' success using the power of storytelling in theatre combined with community engagement. Development and sales can be increased when synergy is found around a topic and a title. All attendees will engage in discussion of issues in their communities that could benefit from this approach and brainstorm strategies for outreach and growth.

5:45 - 7:45 pm

Networking Reception at the Bechtler Museum of Modern Art

Bechtler Museum of Modern Art

420 South Tryon Street

End this busy day with drinks and conversation in one of Charlotte's most inspired and inspiring spaces, including private tours of the galleries.

The Bechtler is a jewel of a museum, only the second in this country designed by the Swiss architect Mario Botta. It is intimate in scale, delightfully arresting in its spaces and vistas and simple and elegant in its materials. The collection presented includes works by the most important and influential artists of the mid 20th century including Miró, Giacometti, Picasso, Calder, Hepworth, Nicholson, Warhol, Tinguely, Ernst, Le Corbusier, Chillida and many others. Only a handful of these wonderful artworks have been on public view in the United States. Until now, the collection was privately held by the Bechtler family of Switzerland.

Sponsored by Blumenthal Performing Arts and the Bechtler Museum



**Blumenthal
Performing Arts**

Saturday, April 11, 2015

9:00 - 10:00 am

Continental Breakfast

Blumenthal Performing Arts

McGlohon Theatre Lobby

Spirit Square, 345 North College Street (enter on North Tryon)

Sponsored by The Hollywood Pantages



10:00 - 11:00 am

Panel: Cross-Cultivation

McGlohon Theatre

How do we communicate need to potential donors? How can patrons, who are already buying tickets, be persuaded to give more as donors? Once they're on board, how do we maintain strong relationships with donors, especially as our own staffs turn over?

Moderated by Keith Cromwell (Red Mountain Theatre Company), with Michael Ballam (Utah Festival Opera Company), Adam Dawkins (Ogunquit Playhouse), Melanie Doerner (North Carolina Theatre) and Melodee DuBois (ZACH Theatre).

11:00 - 11:30 am

Networking Coffee Break

McGlohon Theatre Lobby

11:30 am - 12:30 pm

Panel: Successful Board/Staff Collaboration

McGlohon Theatre

A panel of administrators and board members will share their tips for successful collaboration in fundraising and leadership.

Moderated by Jeff Loeb (The Hollywood Pantages), with James Donio (Eagle Theatre), Lisa Grele Barrie & Don Stroud (North Carolina Theatre), Michael Murphy & Lynne Wheeler (The Old Globe), Jeremy Wanless & Adrian Frost (Rainbow Stage) and Harriet Schlader & Regina Del Valle (Woodminster Summer Musicals).

12:30 - 1:15 pm

Concurrent Breakout Sessions

Endowment and Legacy Programs for Smaller Organizations

McGlohon Theatre

Led by Angela Cassette (Music Theatre Wichita)

Turning Volunteers Into Donors

Dance Studio C

Led by Branden Huldeen (NAMT)

Grant Calculations: Making Sure Your Time Investment Matches The Potential
Reward and Relevance

Wells Fargo Gallery

Led by Melanie Doerner (North Carolina Theatre)

1:15 - 2:45 pm

Lunch

Belk Theatre Upper Lobby

130 North Tryon Street

Sponsored by Music Theatre International



3:00 - 4:00 pm

Panel: Fundraising Events – To Gala Or Not To Gala?

McGlohon Theatre

Are galas and other fundraising events worth the time it takes to produce them? Are they the only way to reach certain constituents? Are the branding and the experience they provide sometimes more important than the money raised? We'll hear from theatres of all sizes about successful event planning – and some creative alternatives.

Moderated by Phil Santora (TheatreWorks Silicon Valley), with Michael Baron (Lyric Theatre of Oklahoma), Rich Bowen (Fulton Theatre), Angela Cassette (Music Theatre Wichita), Laura Little (Coeur d'Alene Summer Theatre) and Aaron Young (Fulton Theatre).

4:00 - 4:45 pm

Panel: What Happens After No?

McGlohon Theatre

In fundraising, sometimes “no” means “maybe.” How do you move on with a potential donor, and what happens next?

Moderated by Betsy King Militello (NAMT), with Jennifer Jaquess (Red Mountain Theatre Company), Paige Price (Theatre Aspen) and Beth Turcotte (Ball State University).

4:45 - 5:00 pm

Closing Remarks

McGlohon Theatre

6:30 pm

Closing Dinner

*The Asbury
237 North Tryon Street*

This is an add-on event for attendees who registered for it with their Conference registration.

Thank you for attending the 2015 NAMT Spring Conference.

*Your feedback is very important to us! Please fill out the evaluation form online at
namt.org/sc15eval*

(you will receive an email with this link at the conclusion of the conference).

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