



Georgia Chapter

**Diversifying Your Fundraising Approach and Measuring Strategic Impacts**  
**Spring Conference**  
**Thursday, May 20, 2021**

This meeting is virtual and available to you through ZOOM. Register in advance at:

[Link For APRA-GA Spring Conference May 20, 2021](#)

After registering, you will receive a confirmation email with a link to join the free webinar.

All times are Eastern Standard Time

**Schedule for Thursday, May 20th**

- 8:00 – 8:45**      **Virtual Coffee Hour**  
Join us for a virtual coffee and networking time before the conference begins.
- 9:00 – 9:05**      **Welcoming Remarks**
- 9:00 – 10:00**      ***It's not just the numbers! - Income Psychology & Giving Behavior***  
Amy Begg, Harvard University
- High income earners often have similar assets to those in finance who are typically compensated through a bonus structure. The ways in which they earn impacts how they think about their money and ultimately their philanthropy. Explore the psychology of this and strategies we might employ toward these industries.
- 10:00 – 10:15**      **Break**
- 10:15 - 11:15**      ***Engaging More Women as Major Donors***  
Angela White, CFRE, JGA
- Over the last ten years, the Women's Philanthropy Institute has produced more than 20 reports that have proven that gender matters in philanthropy. Angela White will briefly explore this research, highlight the characteristics of women philanthropists, and learn ways to better identify women as prospective major donors.
- 11:15 – 11:30**      **Break**



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**11:30 - 12:00**      **APRA-GA Members' Meeting**

Hosted by the APRA-Georgia Board

Join us for the APRA-GA Members Meeting for updates and plans for the year.

**12:00 - 1:00**      **Lunch**

**1:00 - 2:00**      ***The Importance of Metrics in Advancement***

Jon Thorsen, Advancement Services Consultant

Implementing metrics across an Advancement operation has never been more important. Non-profit organizations continue to rely on fundraising for their growth - and, in many cases, their survival. Measuring success in a reliable and objective manner is therefore a necessity. We will discuss the importance of metrics for assessing performance, effectively staffing a fundraising operation, and incenting the behaviors we want to reward.

**2:00 - 2:15**      **Break**

**2:15 - 3:15**      ***Demystifying DEI in Prospect Development: A Systems Thinking Approach***

Chandra Montgomery, University of Southern California

The imperative to build greater diversity, equity, and inclusion (DEI) within our organizations has real implications for the practice of prospect development. While we may be clear on the "why" of embedding DEI principles in our work, many of us may be challenged by the "what" and the "how." In this interactive session, we will apply a systems thinking framework to develop strategies and tactics that leverage core prospect development competencies to advance equity and inclusion. Participants will explore concrete examples and problem-solve to develop strategies that propel our organizations to maximize engagement and philanthropic opportunities.

**3:15 - 3:30**      **Closing Remarks and Adjournment**



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**SPEAKER BIOS  
2021 SPRING CONFERENCE**



**Amy Begg**  
**Director of Prospect Management, Office of Alumni Affairs and Development**  
*Harvard University*

Amy Begg is the managing director of prospect management at Harvard University's Office of Alumni Affairs and Development. In 2016, she created the first prospect management team for the Faculty of Arts and Sciences at Harvard. Prior to joining Harvard in 2003, she was the director of research at the YMCA of Greater New York in Manhattan.

Begg serves as a trustee for the University System of New Hampshire (USNH), which includes all of the public colleges and universities in the State of New Hampshire. As trustee she serves on the Educational Excellence Committee, Finance Committee on Investments, and the Audit Committee. She is a past president and board member of the New England Development Research Association (NEDRA). Previously, she served as a board member for the Plymouth State Alumni Association, including a term as chair of the association.



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**Angela White, CFRE**  
**Senior Consultant and CEO**  
*JGA*

Angela E. White, CFRE, has been instrumental in JGA's success since 1996, when she joined the JGA team. In 2011, she became CEO of JGA, responsible for providing day-to-day leadership to the firm and guiding the JGA staff, while continuing to provide tailored consulting services directly to our clients. Angela has a high level of expertise in philanthropic consulting in healthcare, education, social services, arts, and faith-based organizations. She also has considerable depth in strategic planning and data analysis.

Among Angela's passions are women's issues and women-serving organizations. Angela is a member of the faculty at The Fundraising School at the Indiana University Lilly Family School of Philanthropy and often presents on behalf of the Women's Philanthropy Institute.

Before joining JGA, Angela was the Executive Director for Institutional Advancement at the University of Indianapolis. There, she managed the functions of development, alumni relations, marketing and media relations, publications, and prospect research. She began her career in development at Saint Mary-of-the-Woods College, where she served as Vice President of Institutional Advancement.

She currently serves on the Committee on Directorship for CFRE International. She has served as the Conference Co-Chair for CASE District 5, the Vice President for Membership for the Indiana Chapter of the Association of Fundraising Professionals, and as the Chair of the Indiana Achievement Awards. In 2012, Angela was recognized as a Women of Influence honoree by the Indianapolis Business Journal for her extensive work with Indianapolis-area nonprofits and her efforts to advance the understanding of women's philanthropy. Angela is a CFRE, graduate of Saint Mary-of-the-Woods College in Indiana, and obtained her Master's degree in business from Purdue University.



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**Jon Thorsen**  
**Advancement Services Consultant**

Jon Thorsen is an Advancement Services consultant, specializing in process improvement, metrics implementation, and the development of protocols and project management principles. He joined the development profession in 1987 and has led research, relationship management, and advancement services operations for such organizations as Princeton University, the American Red Cross, The Nature Conservancy, and the Washington State University Foundation. Jon chairs the Best Practices in Advancement Services effort of the Association of Advancement Services Professionals and has been recognized for his volunteer work in the association. He is a former president of APRA and has received the association's Distinguished Service Award. Jon has given presentations on many facets of the development profession at a number of conferences and has received the CASE Crystal Apple award for teaching excellence.



**Chandra Montgomery**  
**Director of Health Sciences Prospect Development and DEI Council Co-Chair, University Advancement**  
*University of Southern California*

Chandra Montgomery is a veteran fundraising strategist and certified diversity, equity, and inclusion (DEI) speaker and practitioner. Her background in philanthropy spans academic medicine, higher education, public media, and social services. She is currently chair of Apra International's Advocacy Committee and is a founding member of Apra's inaugural DEI Committee. Additional commitment to Apra includes service as Membership Chair, PD Conference Planning Committee member, Apra-Virginia Board of Directors, Relationship Management Body of Knowledge Committee, and MARC conference volunteer. She is also an alumna of CASE's Minority Advancement Institute.

Chandra is co-chair of the University Advancement DEI Council at the University of Southern California where she is the director of pipeline and prospect development for Health Sciences. Prior to USC, she led prospect development teams at National Public Radio and Virginia Commonwealth University. Chandra holds a BA from Hampton University and is pursuing a master's degree at USC's Gould School of Law.



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## **APRA-Georgia Membership Registration**

**Join APRA-GA for \$40.00 now and become a member for 2021. You will have access to The Mentor Program and discount rates to events, chapter news, and information throughout the year.**

**Membership Applications**

**[Membership Application \(PDF\)](#)**

**[Membership Application \(Word Doc\)](#)**

**Please send completed membership applications to Treasurer, Beth Ma. Membership applications and check payments should also be sent to Beth.**

**Utilize our secure website for your payment.**

**<https://squareup.com/market/apra-ga> . You will receive a receipt.**

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