

*11<sup>th</sup> Annual*

# HBCU

PHILANTHROPY  
SYMPOSIUM



Maximizing Philanthropy in the Moment

**JULY 20-22, 2021**

Premier Sponsor

**BANK OF AMERICA**



*11<sup>th</sup> Annual*  
**HBCU**

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PHILANTHROPY  
SYMPOSIUM



# Founder's Message



**Dear Fellow Colleagues,**

It is my pleasure to welcome each of you to the 11th Annual HBCU Philanthropy Symposium. Here we are again VIRTUAL but still committed to coming together to share and learn.

This year's theme is Maximizing Philanthropy in the Moment. All Historically Black Colleges and Universities were invited to participate as well as Community Colleges and Minority Serving Institutions. I am proud to report we have the highest number of schools participating since the inception of the Symposium!

We have come out of an unbelievable year, one of many tragedies due to the pandemic and racial justice unrest; but new opportunities were launched with rays of hope. Spurred by historic commitments from Corporations, Philanthropists, and Alumni, many institutions have shared record revenue raised this year. But, as our theme states, we must maximize philanthropy in this moment in time for it to be impactful long term.

Thanks to the Symposium Planning Committee, led by LaShawne Pryor, we have an excellent program for you. Over the next three days we will hear from four major Foundations namely the Kresge Foundation, Lumina Foundation, Bill and Melinda Gates Foundation, and the Strada Education Network. In addition to various informative sessions on Wednesday, we will start the day with the President's Panel, with five of our HBCU Presidents shedding light on the higher education environment today.

Day three includes a message from Complete College America and continue with must-attend sessions.

All of this is brought to us complimentary by our Sponsors. A special thanks to Bank of America, our 2021 Premier Sponsor. We appreciate all of your continued support.

As we grow together in knowledge of how to sustain and transform our institutions for the better, we will lift our students and support them in being future leaders around the World.

Enjoy the Symposium, and thank you for attending.

**Vita Pickrum, Ed.D.**

Chair, HBCU Philanthropy Symposium

Vice President, Institutional Advancement, Delaware State University

President, Delaware State University Foundation

# AGENDA



## TUESDAY, JULY 20

12 – 12:15 p.m.	<p><b>Opening Session   Sponsored by Bank of America</b></p> <p><b>Dr. Tony Allen</b>, President, Delaware State University  <b>Dr. Vita Pickrum</b>, Vice President, Institutional Advancement, Delaware State University  <b>Chip Rossi</b>, DE Market President, Bank of America  <b>Eric Hart</b>, Chief Programs Officer, Thurgood Marshall College Fund</p>
12:15 - 12:30 p.m.	<p><b>Opportunities with Thurgood Marshall College Fund   Sponsored by TMCf</b></p> <p><b>Amy Goldstein</b>, Vice President, Organizational Advancement, Thurgood Marshall College Fund</p>
12:30 – 1 p.m.	<p><b>The Past, Present and Future of Diverse Generosity: Implications for HBCU Advancement   Sponsored by IU Lilly Family School of Philanthropy</b></p> <p><i>In this session, award-winning scholar, former fundraiser, and HBCU graduate Dr. Tyrone McKinley Freeman will present early findings from the ongoing “Everyday Donors of Color” national research study being conducted by the IU Lilly Family School of Philanthropy and funded by Gates Foundation. Data on giving in diverse households during the 2020 pandemic will be presented with related historical context. Following the presentation, Dr. Freeman and Dr. Vita Pickrum will enter into conversation about implications for advancing philanthropy at HBCUs.</i></p> <p><b>Tyrone Freeman</b>, Associate Professor of Philanthropic Studies, Lilly School of Philanthropy at IU  <b>Vita Pickrum, Ed.D.</b>, Vice President, Institutional Advancement, Delaware State University</p>
1:15 – 1:45 p.m.	<p><b>Fireside Chat with Foundation Leaders</b></p> <p><b>(Moderator) Dr. Devona Williams</b>, President Goeins Williams/Chairwoman Delaware State University Board of Trustees and Foundation Board of Directors  <b>Bill Moses</b>, Managing Director for Education, Kresge Foundation</p>
1:55 – 2:25 p.m.	<p><b>Fireside Chat with Foundation Leaders   Sponsored by Strada Education Network</b></p> <p><b>(Moderator) Dr. Devona Williams</b>  <b>Daryl Graham</b>, Senior Vice President for Philanthropy, Strada Education Network</p>
2:35 – 3:05 p.m.	<p><b>Fireside Chat with Foundation Leaders</b></p> <p><b>(Moderator) Dr. Devona Williams</b>  <b>Danette Howard, Ph.D.</b>, Chief Policy Officer and Senior Vice President, Lumina Foundation</p>
3:15 – 3:45 p.m.	<p><b>Fireside Chat with Foundation Leaders</b></p> <p><b>(Moderator) Dr. Devona Williams</b>  <b>Nate Simpson</b>, Senior Program Officer, Bill &amp; Melinda Gates Foundation</p>
3:45 – 4:30 p.m.	<p><b>Voices of Advancement Leaders</b></p> <p><b>Donna Howard</b>, Vice President for Institutional Advancement, Morgan State University  <b>Kenneth E Sigmon</b>, Vice Chancellor, North Carolina A&amp;T State  <b>Felicia Murphy-Phillips</b>,  <b>Marc Barnes, Ph.D.</b>, Vice President Institutional Advancement, Dillard University</p>

## WEDNESDAY, JULY 21

9:15 – 10:15 a.m.

### Conversation with HBCU Presidents

*HBCU Presidents' perspective on the current state of philanthropy and its impact on our boldest initiatives.*

**Dr. Brenda Allen**, President, Lincoln University  
**Dr. Tony Allen**, President, Delaware State University  
**Dr. Heidi M. Anderson**, President, University of Maryland Eastern Shore  
**Dr. Quinton Ross**, President, Alabama State University  
**Ms. Suzanne Elise Walsh**, President, Bennett College

10:15 – 11 a.m.

### Bank of America's Keynote | *Sponsored by Bank of America*

*Conversation with Kerry Sullivan, President, Bank of America Charitable Foundation*

**Kerry Sullivan**, President, Bank of America Charitable Foundation  
**Ebony A. Thomas**, SVP, ESG and Public Policy Executive  
**Tiffany Eubanks-Saunders**, Managing Director, Head of Diverse Segments Bank of America

11:15 a.m. – 12 p.m.

## BREAKOUT SESSIONS

### Expanding Philanthropy through Messaging and Marketing

*Our panel will discuss why it is important to have clear and strategic goals when developing content to promote your institution. The panel will also discuss how a powerful concise marketing message will increase your donor engagement and philanthropic donations.*

**Melissa DePino** Principle and co-founder, Leapfrog  
**Lois Russell**, Vice President for Marketing and Strategic Communications, Alabama State University  
**Rodney Trapp**, Vice President for Institutional Advancement, University of the District of Columbia

### Planned Giving: Seeds for the Future | *Sponsored by The American College of Financial Services*

*The events of 2020 underscored how important it is to ensure our institutions are financially sustainable. Planned gifts provide steady and opportunistic support to meet your organization's mission while helping your donors meet their tax, estate planning, financial planning, and philanthropic needs. In this session, you will gain a greater understanding of why and how to start a planned giving program, the role of a consultant, recent trends, and the shape of things to come in the sector. Participants are encouraged to engage throughout the conversation by sharing questions and experiences.*

**(Moderator) Carí Jackson Lewis, J.D., LL.M.** (taxation), TEP®, CSPGCM, Founder & Principal, California Philanthropic Consulting  
**Dien Yuen, JD/LLM, CAP®, AEP®**, Assistant Professor of Philanthropy, The American College of Financial Services  
**Crystal Thompkins, CAP®, CSPGCM**, Head of Philanthropic Solutions, BNY Mellon Wealth Management

### Successful Strategies for Effective Donor Engagement

*This session will look at various engagement strategies leveraged by Stillman College and Prairie View A&M University over the past year to engage donors during the recent pandemic. We will discuss what initiatives had the most impact and how the successful strategies can be used as Higher Education begins to operate in a more normal environment.*

**(Moderator) LaShawne Pryor**, Assistant Vice President, Development, Delaware State University  
**Tyler Davidson**, Director of Development, Stillman College  
**LaShonda Williams**, Director, Annual Fund, Prairie View A&M University

### How to Eat an Elephant: Setting Goals to Maximize Fundraising Efforts in the Moment

*The key take away of this workshop is the possibility and viability of implementing key performance indicators and metrics based on historical data that dictate the actions necessary for meeting fundraising goals.*

**Pamela Mitchell**, Manager of Advancement Services, Alcorn State University

## WEDNESDAY, JULY 21 (continued)

12:15 – 1 p.m.	<p><b>Legislative Impact on Current State of Philanthropy   <i>Sponsored by Incyte Pharmaceuticals</i></b> <i>A review of the current legislative changes in Washington D.C. and how the changes affect philanthropy. Learn what Advancement Professionals need to know to be proactive with Donors as a result of the changes.</i></p> <p><b>Brian Flahaven</b>, Vice President, Strategic Partnerships, Council for Advancement and Support of Education</p>
1 – 1:15 p.m.	<p><b>Break</b></p>
1:15 – 2 p.m.	<p><b>Opportunities with The Propel Center   <i>Sponsored by Apple and Southern Company</i></b> <i>An overview on the Global Innovation Hub for HBCUs, launched by Apple and Southern Company.</i></p> <p><b>Julie Sills Molock</b>, Chief Development Officer, The Propel Center</p>
2:15 – 3 p.m.	<p><b>BREAKOUT SESSIONS</b></p> <p><b>Centralized Asset Fund</b> <i>Introduction to the creation of a central Fund to support long standing Black institutions that have been in existence for 50+ years.</i> <b>Anna Barber</b>, President &amp; Principal Consultant, Barber &amp; Associates, LLC</p> <p><b>Cultivating Campus Entrepreneurship as a Development Strategy   <i>Sponsored by Discover</i></b> <i>Today's students are tomorrow's donors. How do we support our campus entrepreneurs for success while building our future donor base? Hadiyah Mujhid will lead a conversation demonstrating the importance of campus entrepreneurship and its impacts on planned giving. The conversation will give examples of University Founder Pledges' and Pre-exit Programs that support long-term giving strategies. Hadiyah will also provide an overview of HBCUvc; a nonprofit focused on supporting future technology entrepreneurs and venture capitalists from the HBCU community.</i></p> <p><b>Hadiyah Mujhid</b>, Founder and CEO, HBCUvc</p> <p><b>Best Practices: Alumni Collaboration with Advancement — Partnerships for University Success</b> <i>This session will examine best practices from alumni, alumni associations, and affinity group partnerships</i></p> <p><b>(Moderator) Dr. Marcia A. Taylor</b>, Assistant Vice President of Alumni Relations, Delaware State University <b>Sandra Stubbs</b>, Director of Alumni Affairs Alabama A &amp; M University, Office of Alumni Affairs <b>Carolyn R. Snell</b>, Assistant to the Vice President for Student Development and Services Director of Career Development, Claflin University, Office of Career Development <b>Tonyetta McDaniel</b>, Assistant Program Coordinator, Administrative Specialist <b>Kimberly Reese</b>, Associate Vice President of Institutional Advancement, Xavier University <b>Lacrecia Jones</b>, Director of Alumni Relations and Annual Giving, Xavier University <b>Tonyetta McDaniel</b>, Assistant Program Coordinator Administrative Specialist Director of Alumni Affairs, Claflin University</p>
3:15 – 4 p.m.	<p><b>Voices of Advancement Leaders</b> <b>Marcus Ward</b>, Vice President Institutional Advancement, Alcorn State University <b>Angela Minniefield</b>, Senior Vice President of Advancement, Strategic Development &amp; External Affairs, Charles R. Drew University of Medicine and Science <b>Dr. Prince Brown</b>, Vice President, Voorhees College <b>Melinda Spaulding</b>, Vice President University Advancement, Texas Southern University</p>

## THURSDAY, JULY 22

10:15 – 11 a.m.	<p><b>The Fate of the COVID-19 &amp; Racial Reconciliation Windfalls: How HBCUs Should Use These Dollars to Stabilize, Sustain &amp; Thrive   <i>Sponsored by Vanguard</i></b></p> <p><i>CCA's President will discuss with two campus honors programs director the ways in which their historically blacks institutions are using federal dollars, private philanthropy and corporate sponsorships to center student success toward college completion. They will also discuss pitfalls institutions should avoid as they deploy these resources.</i></p> <p><b>Dr. Yolanda Watson Spiva</b>, President, Complete College America  <b>Dr. Michelle S. Hite</b>, Director, Ethel Waddell Githii Honors Program, Associate Professor of English, Spelman College  <b>Dr. Karen Keaton Jackson</b>, Director, University Honors Program, Professor of English, North Carolina Central University</p>
11:15 a.m. – 12 p.m.	<p><b>Innovative Partnerships between Corporations and HBCUs to increase the Diversity Talent Pipeline</b></p> <p><b>(Moderator) Rob Henry</b>, Vice President of Development, Culture, and Talent, Council for Advancement and Support of Education  <b>Mellanie Lassiter</b>, Senior Manager, Corporate Relations, PepcoHoldings  <b>Ayana Pilgrim-Brown</b>, Head of Diversity Recruiting Strategy, Vanguard  <b>Ms. Sonja Wilkerson</b>, Executive Vice President and Chief People Officer, Bloom Energy</p>
12 – 12:30 p.m.	<b>Break</b>
12:30 p.m. – 1 p.m.	<p><b>United Negro College Fund   <i>Sponsored by United Negro College Fund</i></b></p> <p><b>Ed Smith-Lewis</b>, Executive Director, Institute for Capacity Building, United Negro College Fund</p>
1 – 1:20 p.m.	<b>Special Announcement by Exelon</b>
1:20 – 1:30 p.m.	<b>Break</b>
1:30 – 2 p.m.	<b>Managing Events After COVID-19</b>
2 – 3 p.m. <b>CLOSING SESSION</b>	<p><b>Advancement Leaders Perspective: What it Means to Maximize Philanthropy in the Moment</b></p> <p><b>Ken Westary</b>, Vice President Institutional Advancement, Community College of Baltimore County  <b>Dr. Marcus H. Burgess</b>, Vice President Institutional Advancement, Claflin University  <b>Mautra Jones, Ed.D.</b>, Vice President Institutional Advancement and External Affairs, Langston University</p>



# SPEAKERS



## TONY ALLEN, PH.D.

### President, Delaware State University

Committed to a vision of making Delaware State University the most diverse, contemporary HBCU in America, Tony Allen became the University's 12th President on January 1, 2020. He succeeded Dr. Wilma Mishoe, the first female chief executive in the institution's history.

Previously, Tony led the corporate reputation group at Bank of America and was responsible for developing programming to influential media elites, national social justice advocates, academics and elected officials and their staff at federal and local levels. He was also responsible for ongoing reputation analysis and related research; led communications for the bank's Consumer, Commercial Banking, and Wealth Management businesses; and co-chaired the Global Marketing & Corporate Affairs Diversity & Inclusion Council. He started his financial services career as an Executive Vice President at MBNA America.

Tony had previously served as Delaware State University's Executive Vice President and Provost since July 2017. As Chief Academic Officer of the nation's #4 public HBCU (as ranked by US News & World Report), he led a faculty of more than 220 professors in 18 academic departments, serving over 5,000 undergraduate and graduate students.

In two-and-one-half years as Chief Academic Officer, Tony implemented a reorganization of the University's academic colleges and the professional advising unit. Under his leadership, the University has developed new impact-oriented organizations including the Center for Neighborhood Revitalization and Research and the Center for Global Africa, while materially expanding the institution's global partnerships in China, Poland, Jamaica, and across Africa.

During that period, the University's funded research portfolio increased from \$19 million to \$23 million (7th among HBCUs) and the institution's chartered Early College High School graduated its first two classes, sending 52% of those students to Delaware State University with an average of 40+ college credits already earned.

He holds a 1993 Bachelor of Arts Degree in Political Science from the University of Delaware and a 1998 Master's Degree in Public Administration in Nonprofit Management and Community Development from the Austin W. Marxe School of Public and International Affairs, Baruch College (CUNY). He completed his academic journey at the University of Delaware's Joseph R. Biden Jr. School of Public Policy and Administration by earning a 2001 Ph.D. His dissertation was on "Devolution and Intergovernmental Decision-Making: The Delaware Welfare Reform Experience."



# SPEAKERS



## MARCUS H. BURGESS

**Interim Vice President for Institutional Advancement, Claflin University**

Mr. Marcus H. Burgess is a native of Cades, South Carolina. He is a 1996 graduate of Claflin University where he earned a BS in Elementary Education and a 2000 Graduate of The Citadel, earning a MS in Education Administration and Supervision. He is currently a doctoral student at Vanderbilt University in the Peabody School of Education.

Burgess currently serves as Interim Vice President for Institutional Advancement at Claflin University, and most recently held the position of Associate Vice President for Major and Planned Gifts. Prior to his return to Claflin in 2019, Burgess served several institutions in a leadership capacity, including York Technical College in Rockhill, SC as the Executive Director for Campaigns and Strategic Initiatives; Florida Memorial University, Miami Gardens, FL, as the Vice President for University Advancement; and Voorhees College as the Vice President for Institutional Advancement.

The past two years have been very exciting for him. He has been instrumental in working with Claflin's new president to strategically align initiatives in preparation for a major fundraising campaign while also raising crucial funds for the university and establishing noteworthy partnerships with corporations, foundations, and individuals. Prior to his roles at Claflin, he helped to close a \$3.2 Million Dollar gift for Florida Memorial University, the largest in the school's history and was appointed to the CASE (Council for Advancement and Support for Education) District III Board of Directors.



## TYLER DAVIDSON

**Director of Development, Stillman College**

Tyler Davidson provides administrative support for Institutional Capacity Building. Tyler is a native Georgian and he has worked in higher education since his year as a student intern in Institutional Advancement. He received a BA in Biology from Stillman College. Tyler has developed a passion for higher education, since becoming a recipient of an endowed scholarship at Stillman College. The experience gave him a deep appreciation for the importance of a good education and it sparked an interest in donor stewardship and the need to improve the quality of life for college students; one student at a time.

# SPEAKERS



## MELISSA DEPINO

**Principle and co-founder, Leapfrog**

Melissa DePino has been an industry leader in articulating the brands of non-profits for more than 20 years. She co-founded Leapfrog Group in 2004, and in her capacity as principal and editorial director, she creates messaging that allows clients to distinguish themselves in a competitive marketplace in both admissions and advancement. Having advised hundreds of independent schools, colleges and universities, healthcare, arts and advocacy organizations, her strengths-based messaging model has changed the non-profit marketing landscape. In her spare time, Melissa is a writer and antiracism activist and speaks nationally on the topic through her organization, From Privilege to Progress.



## TIFFANY EUBANKS-SAUNDERS

**Managing Director, Head of Diverse Segments, Bank of America - Private Bank**

Tiffany Eubanks-Saunders serves as the Head of Diverse Segments for the Private Bank business at Bank of America Corporation. Reporting the President of the Private Bank, Tiffany is responsible for leading strategies that cultivate business development with traditionally underserved client segments such as women, people of color and the LGBT+ community.

Prior to this role, Tiffany served as the Market Executive for the Tennessee Private Bank. Under her leadership, the market achieved significant business growth, targeting high net worth families, institutional clients and prospects throughout Tennessee and Kentucky. Tiffany also served as the Carolinas-Tennessee Market Sales Executive for U.S. Trust, responsible for leading Private Client sales teams to drive asset acquisition and sales revenue.

Before joining the Private Bank, Tiffany served as Bank of America's Supplier Diversity and Development Executive, responsible for achieving Bank of America's corporate commitment to spending \$10 Billion with diverse-owned businesses. As a result of Tiffany's leadership, Bank of America was inducted as the first financial services institution to The Billion Dollar Roundtable for Supplier Diversity in 2014.

Since joining Bank of America in 1993, she has held various positions in Consumer and Retail Banking, Global Banking and Markets, Global Technology and Operations, Corporate Finance, as well as Global Marketing and Corporate Affairs.

She is involved in wide variety of professional and civic organizations, including the Executive Leadership Council (ELC) and the National Minority Supplier Development Council Board of Directors. Additionally, Tiffany serves on Executive Advisory Councils for both the North Carolina A&T State University – Deese College of Business Executive and the Tennessee State University School of Business. Among other honors, Tiffany has been recognized as a Top Woman in Business by the Charlotte Business Journal. And, in 2019, Oprah Winfrey honored Tiffany with the prestigious UNCF Maya Angelou "Women Who Lead" award.

# SPEAKERS



## **BRIAN FLAHAVEN**

### **Senior Director for Advocacy, Council for Advancement and Support of Education (CASE)**

Brian Flahaven is senior director for advocacy for the Council for Advancement and Support of Education (CASE), the professional association for advancement professionals at all levels who work in alumni relations, communications, and development. Brian directs CASE's government relations activities and tracks federal and state legislative and regulatory issues of concern to CASE members. He also oversees CASE's college and university foundation programs.

Prior to joining CASE, Brian was the manager of government relations and public policy at the Council on Foundations. He also served as the first Public Policy and Philanthropy Fellow at the Council of Michigan Foundations and worked for former Illinois Lieutenant Governor Corinne Wood.

Brian received his bachelor's degree in political science, economics and history at the University of Illinois at Urbana-Champaign and his Master of Public Policy from the Gerald R. Ford School of Public Policy at the University of Michigan.

In 2016, Brian earned the designation of Certified Association Executive from the American Society of Association Executives. From 2011 to 2016, Brian served as an elected Advisory Neighborhood Commissioner representing the southeastern Capitol Hill neighborhood in Washington DC.



## **TYRONE MCKINLEY FREEMAN, PH.D.**

### **Associate Professor of Philanthropic Studies, Lilly School of Philanthropy at IU**

Tyrone McKinley Freeman is an award-winning scholar and teacher who serves as Associate Professor of Philanthropic Studies and Director of Undergraduate Programs at the Indiana University Lilly Family School of Philanthropy. Previously, he was a professional fundraiser and Associate Director of The Fund Raising School where he trained nonprofit leaders around the globe. His research focuses on philanthropy in communities of color and philanthropy in higher education. His latest book is entitled, *Madam C.J. Walker's Gospel of Giving: Black Women's Philanthropy during Jim Crow* (University of Illinois Press, 2020), which won the 2021 Association of Fundraising Professionals' Skystone Partners Research Prize in Fundraising and Philanthropy. His work has appeared or been cited in *The New York Times*, *O: The Oprah Magazine*, *USA Today*, *TIME*, *Harvard Business Review*, *Stanford Social Innovation Review*, *NewsOne*, *The Conversation*, *Black Perspectives*, *Philanthropy Women*, *Chronicle of Philanthropy*, *CASE Currents*, and *Advancing Philanthropy*. He is co-author of *Race, Gender and Leadership in Nonprofit Organizations* (Palgrave MacMillan, 2011).



# SPEAKERS



## AMY GOLDSTEIN

**Assistant Vice President, Organizational Advancement  
Council for Advancement and Support of Education (CASE)**

As Assistant Vice President, Organizational Advancement for the Thurgood Marshall College Fund, Amy D. Goldstein brings nearly 30 years of experience in the non-profit community, on the national, international and local levels. Throughout her career, Amy has created effective messages that have told the story of an agency's work, its impact and its vision to improve the world.

At TMCF she is responsible for member-school capacity building initiatives, as well as relations with major foundations and partners supporting TMCF core programs. In this role, she has written papers on HBCU retention, enrollment and prior learning assessment. Amy also supports the operations of CAO, engaging with each CAO-supported Center and faculty researchers.

Born in Detroit, Amy grew up with a deep appreciation of the importance of history and culture to diverse communities, as well as with a strong legacy of activism. Earning a BA in Middle East History and Politics from the University of Michigan in Ann Arbor, and an MA in Cultural History from the Jewish Theological Seminary, Amy put her training to work in a variety of agencies including the Anti-Defamation League, Hadassah, B'nai B'rith International and AIPAC. In each position, she reached out to traditional and non-traditional partners, achieved seemingly "unachievable" goals and supported this work with strategic fundraising.

Moving to Houston at the end of 2005, Amy worked for a variety of local groups helping them to meet their goals in outreach and development – including as the Executive Director of the Houston Housing Resource, non-profit serving families living in public housing communities throughout the city. For three years, she led this small non-profit that helped low-income families living in public housing – successfully expanding its program and support base.

Amy is lives in Houston, TX with her daughter.



## DARYL GRAHAM

**Senior Vice President of Philanthropy, Strada Education Network**

As senior vice president of Philanthropy, Daryl A. Graham oversees Strada Education Network's strategic philanthropic investments and overall grant management efforts.

Prior to joining Strada in 2017, Graham spent 15 years with JPMorgan Chase & Co., in Wilmington, Del., serving more than a decade as vice president and relationship manager where he identified grant-making, sponsorship and volunteerism opportunities for the firm.

His background also includes accounting and auditing positions at J.P. Morgan Chase & Co., ConocoPhillips and General Electric.

He has served on a variety of nonprofit boards, including the Philanthropy Delaware Board of Directors, which he chaired. Graham has been honored for his leadership with the YMCA Black Achiever in Business and Industry Award, the H. Fletcher Brown Leadership Award and the Community Reinvestment Act Leadership Award. Graham is a graduate of Morgan State University in Baltimore.

# SPEAKERS



## **ROB HENRY**

**Vice President, Education, Council for Advancement and Support of Education (CASE)**

Rob Henry is vice president of education at CASE where he is responsible for creating an overall global strategy for achieving CASE's vision and mission related to talent management and for guiding conference programming, diversity/inclusion initiatives, research, and the CASE Library.

Formerly an active CASE volunteer speaker and adviser, Rob joined the CASE staff in 2006 as head of emerging constituencies, later adding the responsibility for online educational programs. He previously held advancement management positions at Yale University, the University of Connecticut Foundation and Michigan State University.

Rob is a graduate of Murray State University and has a master's degree from Eastern Michigan University. In 2006, he received the prestigious CASE Crystal Apple Award for Teaching Excellence.



## **DR. MICHELLE S. HITE**

**Associate Professor, Spelman College**

Dr. Michelle S. Hite is an associate professor in the English Department at Spelman College where she also serves as the director of the Ethel Waddell Githii Honors Program. Her teaching and research interests in death and mourning in African American Culture, Southern Studies, and Toni Morrison support the Literary and Textual Studies concentration in the major.

Dr. Hite's most recent meditation on Toni Morrison appeared in the Atlanta Journal Constitution after the author's passing. She can also be heard discussing the cultural impact of Morrison's loss in conversation with NPR's Rose Scott. Dr. Hite's manuscript, Toni Morrison and Portraits of Human Richness is currently under-contract with McFarland Press.



# SPEAKERS



## **DANETTE HOWARD, PH.D**

### **Sr. Vice President and Chief Strategy Officer, Lumina Foundation**

Danette Gerald Howard, Ph.D., is Lumina's senior vice president and chief strategy officer. Howard oversees several of the foundation's strategies aimed at increasing the number of adults who have college degrees, certificates, and other credentials of value, including state and federal policy outreach. She also leads Lumina's efforts to mobilize and engage businesses, communities, colleges and universities, and other actors with stakes in education and training after high school.

Before joining Lumina, Howard served as secretary of higher education in Maryland, leading the Maryland Higher Education Commission. In that role, she oversaw Maryland's statewide financial aid program, approved new academic programs and institutions seeking to operate in the state, and advised the governor and legislators on higher education policies and initiatives.

A nationally regarded analyst and leader, Howard previously served as director of research and policy analysis at the Maryland Higher Education Commission. She also served as assistant director of higher education policy at the Education Trust in Washington, D.C.; as a researcher at the University of Maryland, College Park; and as a student affairs administrator and admissions counselor at the University of Maryland, Baltimore County.

Howard earned her bachelor's degree with highest distinction from Howard University, where she serves on the board of trustees. She also holds a master's degree from the Harvard Graduate School of Education and a doctorate in higher education policy from the University of Maryland. In 2015, she was honored with Howard University's Distinguished Alumni Achievement Award for her outstanding success and national distinction in the fields of education and policy.



## **CARÍ JACKSON LEWIS, , J.D., LL.M. (TAXATION), C.S.P.G., TEP**

### **Sr. Vice President and Chief Strategy Officer, Lumina Foundation**

Carí Jackson Lewis is a nonprofit, tax, and philanthropy strategist and a seasoned trusts and estates lawyer with over 20 years of experience in estate, tax, and charitable gift planning across diverse, international, and domestic settings. Carí works with individuals and families, private foundations, businesses, and allied advisors to facilitate income, estate, and capital gains tax minimization and business exit/succession planning goals through the establishment of sophisticated charitable giving vehicles. She also assists nonprofit staff in establishing and administering planned giving and legacy society programs, donor prospecting and stewardship programs, and special events. Passionate about justice, equity, diversity, access, inclusion, and belonging, Carí uses racial and social justice lenses to create connections and build relationships between nonprofits - including and especially BIPOC (Black, Indigenous and People of Color)-led and BIPOC-serving nonprofit organizations - and donors in the private, public and philanthropic sectors. A member of the New York State Bar in good standing, Carí is also a member of Delta Sigma Theta Sorority, Inc., the Conejo Valley Estate Planning Council, the Society of Trusts and Estates Practitioners Los Angeles, the Black Alumni of Dartmouth Association, the Women of Dartmouth Los Angeles, the African American Development Officers Network, Women of Color in Fundraising and Philanthropy, and the Association of Fundraising Professionals - Greater Los Angeles Chapter. Carí is a co-moderator, along with Soror Joy Webb of the Community Investment Network, of an Advisors of Color cohort for the Chartered Advisor in Philanthropy (CAP) program offered by the American College of Financial Services, a Board Member of the Los Angeles Council of Charitable Gift Planners (LACGP), and the Chair of LACGP's 2022 Western Regional Planned Giving Conference. Carí earned her Bachelor Degree at Dartmouth College in Hanover, New Hampshire, her Juris Doctor at Fordham University School of Law in New York, her Masters of Laws in Taxation (with distinction) from Loyola Law School of Los Angeles, and she is a Certified Specialist in Planned Giving, awarded by the American Institute of Philanthropic Services.

# SPEAKERS



## MAUTRA STALEY JONES

**Vice President for Institutional Advancement and External Affairs, Langston University**

Through her educational, community, and organizational experience, Mautra Staley Jones is known as one of Oklahoma's youngest thought leaders. She advances and elevates each institution she touches.

Mautra serves as Vice President for Institutional Advancement and External Affairs at historic Langston University. She leads the LU Oklahoma City campus as site administrator. She is also executive director of the LU Foundation.

She has been appointed by Governors Kevin Stitt and Mary Fallin as a board director for the Oklahoma Office of Juvenile Affairs, a commissioner for the Oklahoma Merit Protection Commission, and served as a member of the Oklahoma standards steering committee. OKC Mayor David Holt appointed her to the Civic Center Foundation board.

Mautra has held numerous offices with philanthropic and civic groups, earning multiple accolades within a broad assortment of agencies. The Journal Record has honored her as one of fifty women making a difference in the state of Oklahoma for the past two years. The 2018 Women of Color Expo presented by Perry Publishing and Broadcasting named her Woman of the Year. She has been recognized as an Achiever Under 40 by The Journal Record, OKC Biz and Oklahoma Magazine. She has served as a board director for Rotary Club 29, the Oklahoma County Bar Auxiliary, Black Liberated Arts Center, Inc., Storm Inc., and Metro Technology Centers Foundation. She is a member of Alpha Kappa Alpha Sorority, Inc., board of advisors for the Greater Oklahoma City Chamber of Commerce; a Salt and Light Leadership Fellow and a graduate of Leadership Oklahoma City, Class XXIX. Mautra is a member of MSI Aspiring Leaders, a program developed by the Rutgers Center for Minority Serving Institutions, which prepares the next generation of MSI presidents.



## MELLANIE KAI LASSITER

**Senior Manager, Corporate Relations, Pepco Holdings**

As Senior Manager of Corporate Relations for Pepco Holdings, Lassiter oversees the company's ongoing philanthropic and corporate citizenship efforts. Based in Washington, D.C., Pepco Holdings employs more than 4,600 people, owns more than \$21 billion in assets and generates approximately \$4.8 billion in annual revenues. Pepco Holdings serves 2 million customers as the parent company of Pepco, an electric utility serving Washington, D.C., and suburban Maryland; Delmarva Power, an electric and gas utility serving Delaware and the rest of the Delmarva Peninsula; and Atlantic City Electric, an electric utility serving southern New Jersey. Pepco Holdings is a subsidiary of Exelon Corporation, one of the nation's leading energy services companies. Exelon is headquartered in Chicago and trades on the NYSE under the ticker EXC.

# SPEAKERS



## **PAMELA MITCHELL**

**Manager of Advancement Services, Alcorn State University**

Pamela Mitchell has over 15 years of experience working in HBCUs, first working in academic affairs and student affairs before finding a home in institutional advancement. With her combined knowledge of higher education and tax prep, and her love for all things numbers, her drive is to encourage business intelligence with data-based decision-making that is now commonplace with data management, data analytics, and data visualizations.



## **WILLIAM F. L. MOSES**

**Sr. Vice President Advancement, Strategic Development and External Affairs, The Kresge Foundation**

William F. L. Moses serves as managing director for The Kresge Foundation's Education Program, which supports postsecondary access and success for low-income, first-generation and underrepresented students. The key architect of Kresge's education programming, Bill leads the team's continuum of domestic and international grant activities from developing program strategy, reviewing preliminary ideas, and helping grantees develop proposals or initiatives, to awarding funding and monitoring existing grants. Since his arrival at Kresge, Bill has served as a program officer and senior program officer, was instrumental in developing Kresge's Green Building Initiative and has spearheaded the foundation's grantmaking in South Africa.

Before joining Kresge, Bill served as executive director of The Thomas J. Watson Foundation in Rhode Island and as a senior analyst at the Investor Responsibility Research Center in Washington, D.C. He also worked as a research officer at TechnoServe and held various administrative positions in Alaska's state legislature and the federal government, including the U.S. Embassy in Cape Town, South Africa.

A graduate of Claremont McKenna College, Bill holds a master's degree in international relations from Yale University. He is the author of "A Guide to American State and Local Laws on South Africa" and co-author of "Corporate Responsibility in a Changing South Africa." He was the co-chair of the seven-foundation Partnership for Higher Education in Africa and serves on the steering committee of the Africa Grantmakers' Affinity Group, an organization he co-founded. He also is a member of the National Advisory Board of The College Promise Campaign.

# SPEAKERS



## **ANGELA L. MINNIEFIELD, M.P.A.**

**Sr. Vice President Advancement, Strategic Development and External Affairs  
Charles R. Drew University of Medicine and Science**

For over twenty-five years, Angela Minniefield has been dedicated to health professions education access and to equitable healthcare accessibility for underserved and underresourced communities. Since April 2012, Angela has served as Vice President Advancement, Strategic Development and External Affairs at Charles R. Drew University of Medicine and Science (CDU) where she directs and oversees the University's fundraising, communications, and government and public relations activities. Since arriving to CDU, Angela and her team have raised gifts and investments totaling over \$32 million. Angela, previously held several leadership positions at the California Office of Statewide Health Planning and Development (OSHPD), where she advanced State policy and program efforts to increase communities of color representation in health professions and to increase access to healthcare.



## **HADIYAH MUJHID**

**Founder and CEO, HBCUvc**

Hadiyah Mujhid is the CEO and Founder of HBCUvc, a nonprofit that is dedicated to changing how investment capital is formed and allocated to benefit historically underestimated groups. She has experience as both a tech founder and software engineer and is obsessed with leveraging technology entrepreneurship for economic inclusion. She is also an Echoing Green and Praxis Fellow. Hadiyah earned her MBA from Drexel University and holds a BS in Computer Science from the University of Maryland Eastern Shore, an HBCU.



## **AYANA PILGRIM-BROWN**

**Manager of Diversity Recruiting Strategy, Vanguard**

Ayana Pilgrim-Brown is an experienced recruiting leader, career educator and certified coach committed to advancing diversity, equity and inclusion. She holds an MBA in Human Resource Management from Clark University and has years of experience connecting diverse talent to Fortune 100 companies. A proud educator, she served as Adjunct Professor at Temple University's Fox School of Business. Ayana is currently Manager of Diversity Recruiting Strategy at Vanguard where she has oversight to enterprise wide diversity recruiting efforts including HBCU engagement. She is thrilled to be a member of the Delaware State University School of Business Advisory Board.



# SPEAKERS



## **VITA PICKRUM, ED.D, CFRE**

**Vice President of the Division of Institutional Advancement, Delaware State University  
President, Delaware State University Foundation**

Dr. Vita Pickrum serves multiple roles at Delaware State University as the Vice President of the Division of Institutional Advancement, the President of the Delaware State University Foundation, and as of January 2020 Chair of the 12th President's Transition Team. Dr. Pickrum joined the University in 2008, and since that time has held several leadership positions. She is responsible for overseeing all private fundraising for the University, alumni relations, development, and donor relations. Under her leadership, both private fundraising and alumni participation have substantially increased.

Dr. Pickrum has established strategic public and private partnerships that have yielded significant financial support for the University. Dr. Pickrum serves on the President's Administrative Council and is the staff lead for the Delaware State University Board of Trustees' Innovation and Sustainability Committee. Also, Dr. Pickrum oversees the management of the University's Endowment Investment Managers. Dr. Pickrum is the founder of the HBCU Philanthropy Symposium – celebrating its 11th year, a convening of HBCUs, that has grown to include Community Colleges and Minority Serving Institutions.

In 2020, Dr. Pickrum was appointed to the Association of Governing Boards Council of Foundation Leaders. In 2020, Dr. Pickrum was elected as the Vice-Chair of the newly established CASE Committee on College and University Foundations (previously the National Committee on Institutionally Related Foundations).

In 2018, Dr. Pickrum received an appointment to the Council for the Advancement and Support of Education (CASE) Board of Trustees. Of particular note, also in 2018, Dr. Pickrum was recognized with the 2018 Professional of the Year Award from CASE, District II, out of 700 professionals. She also served as an appointed member of the CASE Commission on Philanthropy.

In 2017, the Delaware Alliance of Nonprofit Agencies (DANA) and the Delaware Community Foundation (DCF) elected Dr. Pickrum to each of their Board of Directors, and recently was appointed for second terms on each organization's Board. Her professional career includes working for a United States Senator, owning small businesses, working in Higher Education, and consulting to non-profit organizations.

Dr. Pickrum earned a Doctorate in Educational Leadership from Delaware State University in May 2016 and has a Master of Science degree and a Bachelor of Science degree from Howard University and numerous certificates of achievement. She serves as a Peer Reviewer for the Middle States Commission on Higher Education and is a member of the MSCHE Appeals Board. She was a co-presenter at the 2019 MSCHE Annual Conference. Dr. Pickrum is a Certified Fund-Raising Executive (CFRE) since 2014, as designated by CFRE International.



# SPEAKERS



## **AYANA PILGRIM-BROWN**

**Head of Diversity Recruiting Strategy, Human Resources, Vanguard**

Dr. Vita Pickrum serves multiple roles at Delaware State University as the Vice President of the Division of Institutional Advancement, the President of the Delaware State University Foundation, and as of January 2020 Chair of the 12th President's Transition Team. Dr. Pickrum joined the University in 2008, and since that time has held several leadership positions. She is responsible for overseeing all private fundraising for the University, alumni relations, development, and donor relations. Under her leadership, both private fundraising and alumni participation have substantially increased.

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## **CHIP ROSSI**

**Global Compliance & Operational Risk Operations Executive DE Market President, Bank of America**

Chip Rossi is the Global Compliance & Operational Risk (GCOR) Operations Executive at Bank of America, one of the world's leading financial services companies. In this role, Chip leads the oversight and execution of compliance operations for the GCOR organization.

Chip also represents the bank as the Delaware Market President, working to connect businesses, families and individuals to Bank of America's banking and investment teams. He also leads the effort to direct the bank's resources in the state to address local priorities and help build strong communities.

Formerly, Chip was the Consumer and Global Wealth & Investment Management (GWIM) Chief Risk Officer. In that role, he managed risk for the company's business lines that serve individual clients with deposit, card, auto, home mortgage and investment-related products and services. He was responsible for providing independent risk oversight of the Consumer and GWIM businesses.

Chip began his career as a college intern and joined the company full-time in 1989 as a participant in the Management Development Program. He has held management positions at all levels in Collections and Credit, and also led the Loss Prevention team with accountability for credit and fraud losses. He later became the Credit & Underwriting executive for the company's credit card portfolio, where he focused on the alignment of credit and risk strategies to ensure appropriate balance growth and risk mitigation. He was also Preferred Products executive, responsible for developing and managing consumer products that help make financial lives better for mass affluent customers and that reward clients for their relationship with Bank of America. Products included deposits, credit card, first mortgage, home equity and auto.

Chip serves on the boards of the Delaware State Chamber of Commerce, Delaware State University Foundation, ChristianaCare Health Services, the Grand Opera House, Habitat for Humanity of New Castle County, and Year Up Greater Philadelphia and Wilmington. He also serves on the William Penn High School Advisory Board, Delaware Technical Community College Development Committee and The Delaware Business Roundtable.

Chip graduated from Gettysburg College, where he majored in Management. He and his family live in Wilmington, Delaware.

# SPEAKERS



## KENNETH E. SIGMON, JR.

**Vice Chancellor for University Advancement, North Carolina A&T State University**

Prior to joining North Carolina A&T, he served as Vice President of Development at the Oklahoma State University Foundation, as well as Associate Vice Chancellor for University Development at North Carolina State University in Raleigh, NC. He joined the University from The North Carolina Textile Foundation where he served as Executive Director. He left his alma mater, The Citadel, as Deputy Executive Director and Chief Operating Officer of The Citadel Foundation, having joined that organization as the Director, Alumni Annual Fund and Donor Relations. Prior to joining The Citadel Foundation staff, he served in the U.S. Air Force and held positions with Merrill Lynch, one of the world's leading financial management and advisory companies, and Roadway Services, a global logistics and transportation provider.

Ken has successfully led capital campaigns ranging from \$100 million to \$1 billion. His diverse professional background in development and foundation management includes campaign management, annual giving programs, volunteer management, corporate and foundation giving, leadership and major gifts, stewardship and donor relations, investment and grant management, advancement services, communications and public relations.

Ken and his wife Alison have two children – Emily and Ethan. A native North Carolinian, Ken is a 1985 graduate of The Citadel with a Bachelor of Science degree in Business Administration and completed his Masters in Business Administration from The Citadel in 1994.

Ken's civic and professional activities include service as a Former Trustee, The National Multiple Sclerosis Society, Mid-Atlantic Chapter, former Chair, Development Committee, The National Multiple Sclerosis Society, Mid-Atlantic Chapter, former Co-Chair, The Loyalty Fund, First Baptist Church School, Member, Frontier Chapter of Rotary International, George F. Hixson Fellow, Kiwanis International, Distinguished Past President, Kiwanis Club of Charleston, Co-Chair, The Citadel Class of 1985 Reunion and Development Committee, Member, Council for the Advancement and Support of Education (CASE), Life Member, The Citadel Alumni Association.



# SPEAKERS



## **NATHANIEL SIMPSON**

**Senior Program Officer, U.S. Programs - Postsecondary Success, Bill & Melinda Gates Foundation**

Nate is a Senior Program Officer at the Bill & Melinda Gates Foundation working in the U.S. Programs, Postsecondary Success team. The goal of the team is to strengthen American higher education's ability to both offer accessible, high quality, and affordable postsecondary education and to provide the necessary supports to ensure that students complete their programs of study on time. Within that team, he oversees a \$28M portfolio of funding designed to simplify students' journeys through U.S. postsecondary institutions to credentials of value with a focus on Black, Latinx, and other minoritized populations.

Before joining the Foundation, Nate served 10 years in the field of higher education. He lead a number of student success initiatives that spanned the nation but primarily in his hometown of Chicago, IL and Dallas, TX. He had a long rewarding career at the City Colleges of Chicago and the Dallas County Community College District. His experience in higher education was focused on leading student centered, data-informed, and high quality student affairs teams that included a range from Student Activities, First-Year Experience, Enrollment Management to Veteran Affairs, and many more.

In his most recent position he was able to lead partnerships between a community college and a K-12 school district to establish the only Career and Technical Education Early College High School in the Dallas-Forth Worth area. The school is unique because it allows under-represented student populations the opportunity to experience a supportive rigorous program designed for them to complete their high school diploma and a college credential simultaneously in an in-demand field for their local community with no debt. Nate holds a M.Ed. in Higher Education; Student Affairs from Loyola University Chicago and B.A. in Sociology and Psychology from Morehouse College in Atlanta, GA.



## **DENISE A. SMITH**

**Major Gift Officer, Morgan State University**

Denise Alexander Smith, comes to Morgan State from Radio One, Baltimore after 13 years as a Senior Account Manager. She was responsible for developing, servicing and maintaining numerous advertising and promotional partners for 4 radio stations that serviced the Baltimore market. Her successful relationships, resulted in a book of business exceeding, \$1,000,000 annually. Her client base included national accounts such as AT&T, Nissan, Lowes, Home Depot McDonald's and Taco Bell, in addition to area and local businesses. Prior to that, Denise was an Account Manager for Baltimore's number one Country music radio station, WPOC-FM

A proud graduate of Morgan, with a B.S. degree in Business Administration, in 1973, Denise joined the Morgan State University family, where she currently serves as a Major Gift Officer in the Office of Development. She works primarily with Morgan's Alumni and Advisory Boards from the College of Liberal Arts, the School of Community Health and Policy and the School of Global Journalism and Communications.

Denise is a native of Greensboro, NC, and currently resides in Baltimore County.



# SPEAKERS



## ED SMITH-LEWIS

**Executive Director, Institute for Capacity Building, United Negro College Fund**

Ed is the executive director of UNCF's Institute for Capacity Building, a team dedicated to supporting the resiliency of HBCUs by improving their institutional effectiveness, academic competitiveness, and financial viability. Ed develops and directs multiple continuous improvement programs through ICB, including the Career Pathways Initiative, which engages institutions in transformative practices to improve institutional and student learning and career outcomes.

Before joining UNCF, Ed had a myriad of professional experiences, ranging from nonprofit management to strategic consulting, working at the Bill & Melinda Gates Foundation, Howard University, and McKinsey & Company. Ed is a proud graduate of Morehouse College.



## MELINDA SPAULDING

**Vice President, University Advancement, Texas Southern University**

Melinda Spaulding is vice president of the University Advancement Division at Texas Southern University. She directs TSU's development and alumni relations departments along with KTSU Radio-90.9 FM/The Choice. Spaulding is a member of the President's Cabinet, the University's administrative governing board.

Spaulding, an Emmy Award-winning journalist, was a member of Houston's KRIV-TV/Fox 26 news team for 13 years, co-anchoring Fox 26 News at Noon before being named co-anchor of the prime-time evening and night news broadcasts. She was a reporter and anchored morning updates at WGNO-TV, the ABC news affiliate in New Orleans. Spaulding was awarded an Emmy for Best Spot News Coverage and named Best Spot News Reporter for her work at WGNO by the regional Associated Press. Spaulding started her journalism career in New York as a member of the launch team for Entertainment Weekly Online and as the first editor-in-chief of Essence Online. She went on to become a writer and morning news producer at KTLA-TV in Los Angeles, winning the Best News Writing award from the regional Associated Press.

Spaulding, a native of New Jersey, is a graduate of Howard University. She is a former board member of Family Houston and served on the advisory board for Pro Vision, Inc., an open-enrollment charter middle and high school in the Sunnyside community. She started the Dream Journal Academy to provide journals to area school children so they can write about their passions and dreams to bolster their education and personal aspirations. Spaulding and her husband, Felix Chevalier, are the proud parents of a daughter, Landon and a son, Felix.



# SPEAKERS



## DR. YOLANDA WATSON SPIVA

**President, Complete College America (CCA)**

Dr. Yolanda Watson Spiva's nearly 25-year career in postsecondary education spans a range of executive leadership, general management, public affairs, operations and academic officer positions. She currently serves as the President of Complete College America (CCA), a national nonprofit organization which serves as a bold national advocate for dramatically increasing college completion rates and closing equity gaps by working with states, systems, institutions and partners to scale highly effective structural reforms and promote policies that improve student success.

Dr. Spiva is the former President & CEO of College Success Foundation (CSF), a national non-profit college readiness, access, success, and scholarship organization headquartered in Bellevue, Washington, which served nearly 12,000 low-income students, annually. Prior to joining CSF, Dr. Spiva served as CEO/Executive Director of Project GRAD Atlanta Inc., a not-for-profit organization based in Atlanta, GA, which served as a strategic partner to the Atlanta Public School District as well as hundreds of colleges and universities across the nation to increase the number of low-income, first generation, metropolitan Atlanta students of color graduating from high school and college. Prior to Project GRAD, she was assistant dean at Trinity College in Washington, DC. Dr. Spiva has also held various positions with the U.S. Department of Education in Washington, DC, and Atlanta, GA. in the Offices of Postsecondary Education, Student Financial Assistance, Policy, Planning and Innovation, and culminating with her service as Region IV Public Affairs Director in the southeast regional Office of the Secretary of Education.

Dr. Yolanda Watson Spiva earned her undergraduate degree in economics from Spelman College, her master's degree in public policy from the University of Chicago and her Ph.D. in higher education from Georgia State University. She also holds a board certification as an executive coach from the Center for Credentialing Education.

# SPEAKERS



## KERRY H. SULLIVAN

**President, Bank of America Charitable Foundation**

Kerry Herlihy Sullivan is President of the Bank of America Charitable Foundation, whose mission is to help advance economic mobility for individuals and families, and to support economic progress in communities across the company's global footprint. In this role, Sullivan leads a team responsible for philanthropic strategy in support of the company's commitment to responsible, sustainable growth through a focus on environmental, social and governance issues. The company annually provides \$250 million in philanthropic investments to drive economic mobility and social progress, and in 2020 committed an additional \$100 million of philanthropy to address health and humanitarian needs brought on by the coronavirus.

Sullivan manages relationships with nonprofit partners that address issues fundamental to economic mobility and social progress in low- and moderate-income communities, including basic needs, workforce development and education through job training and up-skilling, and affordable housing and community revitalization that create pathways for social progress and resiliency. Through these partnerships, the Foundation supports vulnerable populations, including working families, youth and young adults out of school and work, seniors, individuals living with disabilities, veterans, and those impacted by the criminal justice system – enabling them to move forward toward their goals. This work is extended further through the lens of the company's efforts to address racial equality and economic opportunity in Black and Hispanic-Latino communities, with a focus on creating opportunities for people and communities of color.

Sullivan leads the company's signature philanthropic programs, Neighborhood Builders®, Neighborhood Champions and Student Leaders®, which recognize the community leadership and service of nonprofit organizations and students in 92 markets across the U.S., with more than \$265 million invested since 2004. These locally-delivered programs help advance diverse leaders and change makers who can tackle complex societal challenges. In addition, Sullivan and her team developed the company's skills-based volunteer corps, Better Money Habits Champions, which supports Bank of America's purpose to improve financial lives.



## DR. MARCIA A. TAYLOR

**Assistant Vice President of Alumni Relations, Delaware State University**

Dr. Marcia Taylor is the Executive Director of Alumni Relations at Delaware State University. She joined the Institutional Advancement staff in 2017 after serving for many years as a faculty member. Dr. Taylor is a three-time PRSA Silver Anvil Judge who currently uses her public relations background to enhance alumni relations. She has written for Public Relations Tactics, PR Week Magazine, and PRSAY, the blog for the Public Relations Society of America.

At DSU, Dr. Taylor developed the first public relations curriculum and chartered the first chapter of the Public Relations Student Society of America (PRSSA) in 1995. She has held offices in the Public Relations Society of America (PRSA) in Delaware and Virginia where she served as a board member while teaching graduate and undergraduate students at Norfolk State University from 2007 to 2010. In 2010, she received the Outstanding Faculty Service Award from Norfolk State University's Mass Communications and Journalism Department. In 2017, she received the Michael J. Feeney Distinguished Service Award from DSU's Mass Communications Department. The Wilmington native volunteers with her church and other non-profits who help young people succeed. In her spare time, she enjoys attending jazz concerts, writing, gardening, cooking, and repurposing items into art.



# SPEAKERS



## **EBONY A. THOMAS**

### **Senior Vice President, ESG and Public Policy Executive**

Ebony Thomas is the Racial Equality and Economic Opportunity Initiatives Executive, responsible for delivering Bank of America's \$1B, four-year initiative to accelerate work to help drive racial equality and economic opportunity for people and communities of color. She works to identify and build partnerships with internal and external community leaders, business leaders, local elected officials and others in the communities we serve to drive economic opportunity and upward mobility through programmatic initiatives.

Ebony previously held roles as a Global Human Resources Executive leading teams in Enterprise Diversity Recruiting Strategy and Market and Site HR. In these roles, Ebony was responsible for the planning, coordination and execution of Market-Site HR capabilities to ensure consistent standards and governance for the HR activities occurring across our 92 market, including market talent planning and development, engagement and diversity and inclusion.

In addition to her executive career, Ebony serves as a board member at Central Piedmont Community College (CPCC). She is also a member of the Board of Visitors for the School of Business at Howard University in Washington, DC. Her service to these organizations are rooted in Ebony's commitment to transform approaches to student achievement, career success and improving generational socio-economic status in underserved communities.

Ebony Thomas is a proud graduate of North Carolina A&T State University where she holds a BA degree in English and History. She lives in Charlotte with her three children, Evan, Croix and Ellis.



## **CRYSTAL THOMPKINS, CAP®, CSPGCM,**

### **Head of Philanthropic Solutions for BNY Mellon Wealth Management**

Crystal is Head of Philanthropic Solutions for BNY Mellon Wealth Management. In this role, leads and coordinates strategy for all of Wealth Management's philanthropic services, including individual and family philanthropy, institutional endowments and foundations, planned giving and donor-advised fund services.

Crystal joined the firm more than 15 years ago in 2006 as a manager for the Planned Giving group in Greensboro, NC. She has more than 20 years of experience working with non-profits, having started in tax preparation and later moving to client relationship management. She has a depth of knowledge in all aspects of gift planning and donor stewardship from her work with large, complex programs across all sectors and provides insights on trends and best practices in support of non-profit clients across the firm.

Crystal has been a frequent speaker at regional and national conferences and events and has published several articles and whitepapers. She is active in the nonprofit community and serves on several boards, including the Foundation Board of her alma mater, Winston-Salem State University.



# SPEAKERS



## RODNEY TRAPP

**Vice President for Advancement, University of the District of Columbia**

Rodney Trapp is the Vice President for Advancement for the University of the District of Columbia where he services as the University's chief fundraising officer and directs work of the University of the District of Columbia Foundation. A seasoned business development and philanthropy professional, Trapp has provided senior leadership and fundraising counsel to nonprofit organizations at the forefront of education access, arts education, cultural inclusion, and poverty alleviation for over 30 years. He is a graduate of Wake Forest University with a Bachelor of Arts in Speech Communications and Theatre Arts and also holds three masters degrees. Presently, Trapp serves as an advisor to the Williams-Franklin Foundation and Beautiful Ventures - a creative social enterprise. He is also a member of: the Opportunity and Inclusion Committee in District II of CASE, the planning committee for the HBCU Philanthropy Forum and Black Benefactors – a giving circle in Washington, DC.



## DARRYL ANN WATKINS

**Senior Program Manager, Institute for Capacity Building, United Negro College Fund**

Darryl Ann Watkins has a passion for excellence and a proven track record of transforming good organizations into great ones. She serves as Senior Program Manager at the United Negro College Fund, where she is responsible for designing and executing strategic supports for HBCUs to improve their student and institutional outcomes. As a United States military veteran, Darryl Ann understands the value of discipline, hard work, and operating as an extraordinary team member. She leverages each of these qualities when propelling institutions towards transformational change.

Darryl Ann has a Bachelor of Science degree in Business Management and a Master of Science degree in Human Resource Management. She is currently pursuing a Doctorate of Ministry from the Interdenominational Theological Center. She is also a certified Six Sigma Green Belt, specializing in process improvements.



## SONJA WILKERSON

**Executive Vice President and Chief People Officer, Bloom Energy**

Sonja joined Bloom Energy as Executive Vice President and Chief People Officer in January 2019. She has more than 30 years of HR leadership experience and most recently served as Senior Vice President of Human Resources at Infinera, where she successfully developed talent strategies to drive organizational effectiveness through the integration of people, technologies, processes and cultures. Prior to Infinera, Sonja worked at Hewlett Packard Enterprise as VP of Human Resources. In this role, she was responsible for providing strategic HR support to the Global Finance and Legal organizations. Sonja joined Hewlett Packard Enterprise from Cisco, where she worked as a Director of Human Resources for more than a decade. Sonja holds a B.S. in Organizational Behavior, an M.B.A. from the University of San Francisco, and an M.S. in Technology Management from Pepperdine University. She currently serves on the board of directors of Koppers, a producer of materials for the aluminum, railroad, agriculture and other industries



# SPEAKERS



## **DR. DEVONA E.G. WILLIAMS**

**President/CEO, Goeins-Williams Associates, Inc. Chair, Delaware State University Board of Trustees/ Chair, Delaware State University Foundation Board of Directors**

As President/CEO of Goeins-Williams Associates, Inc., which she founded in 1986, Williams has contributed her expertise to increasing the performance and effectiveness of hundreds of organizations. Dr. Williams is an expert in strategic planning, organizational performance assessment and development, focus groups, and meeting/retreat facilitation. A major focus of her consulting is on cultural diversity/inclusion, leadership, and business success.

Dr. Williams is Chair of the Board of Trustees for Delaware State University and the DSU Foundation. Williams holds a doctorate in Urban Affairs & Public Policy. She received the University of Delaware's Presidential Citation for Outstanding Achievement and the Distinguished Alumna Award from the University's College of Urban Affairs & Public Policy (1995). In October 2020, Dr. Williams was inducted into the Delaware Business Leaders Hall of Fame, the first black woman to be inducted in its 30 year history.



## **LASHONDA WILLIAMS**

**Director, Annual Fund, Prairie View A&M University**

Ms. LaShonda Williams has over 20 years of experience in the higher education and non-profit industries. She currently serves as Director of the Annual Fund at Prairie View A&M University (PVAMU).

LaShonda's journey to philanthropy began as a volunteer with the PVAMU National Alumni Association (NAA), where she was elected president of the Houston Alumni Chapter. She also served as an NAA Membership Chair, National Convention Chair and Atlanta Chapter Vice President. While serving as the NAA Membership Chair, she raised over \$100K and increased membership by 25% within one year.

Since joining PVAMU five years ago, LaShonda has implemented new initiatives that have increased Annual Fund giving by over 50%. Results driven, she has strategically developed and adapted best practices to create programs that are donor and student [benefactor] centered. Those programs include: I Love My HBCU Month; Homecoming Giving Challenge; Giving Tuesday Now; Donor Scholarship Luncheon; Giving Societies; 5 Year Reunion Program; and Senior Class Giving among traditional solicitation vehicles.

Prior to joining PVAMU, Williams was employed with the University of Houston for 15 years, working in Bauer College of Business External Relations, African American Studies and the College of Education. In addition, her non-profit experience includes the formation and implementation of Project Grad Atlanta initiatives and Summer Institute.

LaShonda holds a BA in Journalism from Prairie View A&M University and a Masters of Public Administration from Troy State University.



# SPEAKERS



## **DIEN YUEN, JD/LLM, CAP®, AEP®**

**Assistant Professor of Philanthropy, The American College of Financial Services**

Dien Yuen, JD/LLM, CAP®, AEP® holds the Blunt-Nickel Professorship in Philanthropy at The American College of Financial Services, where she teaches in the Chartered Advisor in Philanthropy (CAP)® program.

Prior to joining the College, Dien served as Managing Director and Fiduciary Advisor for a wealth management firm assisting high net-worth individuals, families, and charitable institutions. Her former positions include Chief Philanthropy Officer at Give2Asia, Vice President and Senior Trust Officer at U.S. Trust, Executive Director of the IIT Bombay Heritage Fund, Vice President of the Asian Pacific Fund, and Planned Giving Director of the American Cancer Society. She is also the founder of a boutique social impact research and advisory firm serving clients in the U.S. and Asia.

Dien serves on the boards of the American Council on Gift Annuities (ACGA), The 1990 Institute, and Angel Island Immigration Station Foundation. She is on the advisory boards of GlobalSF, Asia Society of Northern California, Philanthropic Ventures Foundation, and Arowana Impact Capital Group.

She holds the Chartered Advisor in Philanthropy® (CAP®) designation from The American College of Financial Services and the AEP® designation from NAEPC. She received her LL.M. in International Law at Golden Gate University, her Juris Doctorate (JD) from the University of Toledo College of Law, and her Bachelor of Arts (BA) in Political Science from Adrian College.







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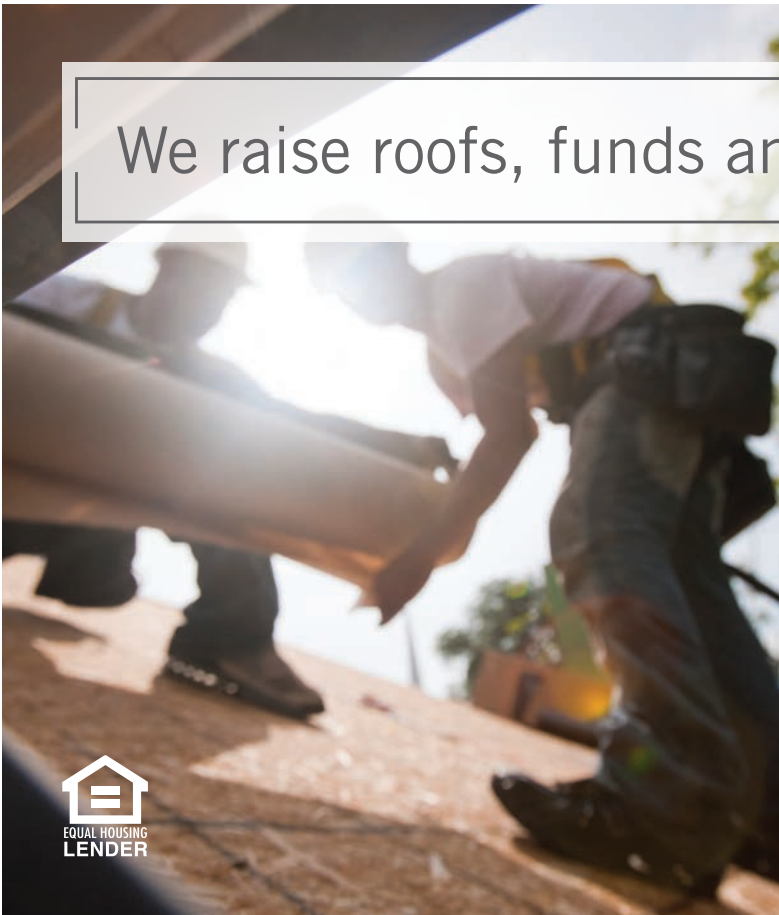
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