# UNITED WAYOF PENNSYLVANIA

IDEA EXCHANGE AND
STATEWIDE CONFERENCE AGENDA

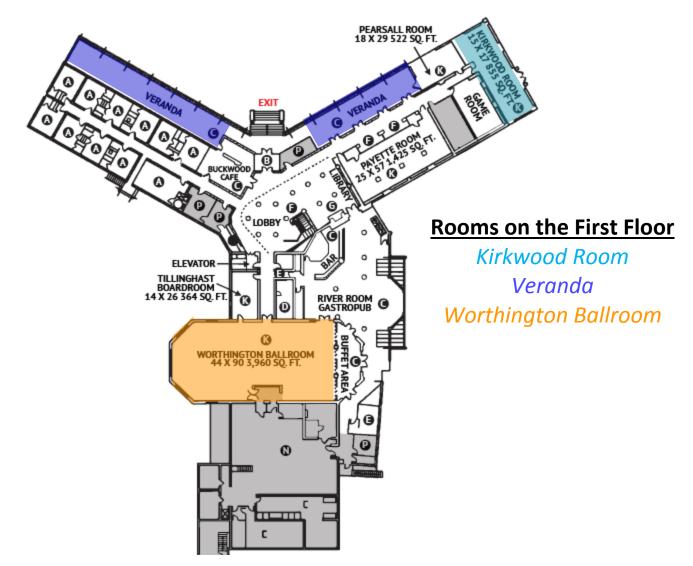
June 21-23, 2017 Shawnee Inn & Golf Resort





# Shawnee Inn & Golf Resort



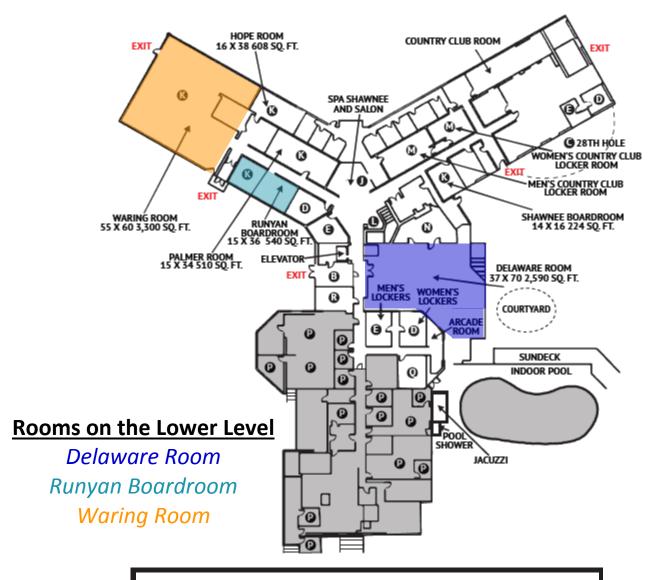


Α	GUEST ROOMS	J	SPA SHAWNEE AND SALON
В	VESTIBULE	K	MEETING ROOMS
C	DINING	L	BUSINESS CENTER
D	WOMEN'S RESTROOM	M	COUNTRY CLUB LOCKER ROOMS
E	MEN'S RESTROOM	N	SERVICE AREA
F	MEETING BREAK AREA	P	ADMINISTRATIVE OFFICES
G	FIREPLACE - ACTIVITIES	Q	FITNESS CENTER
Н	FRONT DESK	Ŕ	COAT ROOM



# Shawnee Inn & Golf Resort

#### **Lower Level**



- A GUEST ROOMS J SPA SHAWNEE AND SALON
- B VESTIBULE K MEETING ROOMS
- C DINING L BUSINESS CENTER
- D WOMEN'S RESTROOM M COUNTRY CLUB LOCKER ROOMS
- E MEN'S RESTROOM N SERVICE AREA
- F MEETING BREAK AREA P ADMINISTRATIVE OFFICES
- G FIREPLACE ACTIVITIES Q FITNESS CENTER
  - I FRONT DESK R COAT ROOM





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### United Way of Pennsylvania Annual Conference

## **Pre-Conference Meetings**

#### Wednesday - June 21

10:00 a.m. - 1:00 p.m. UWP Local Organization Idea Exchange Worthington Ballroom

The first half of the idea exchange will focus on UWP's future service and benefit to members. UWP's president will highlight themes from her interviews with all member CPOs and facilitate a discussion about how UWP can offer services and facilitate collaboration that will strengthen the Pennsylvania network. The second half of the meeting agenda will be driven by issues affecting the membership. For any given topic, discussion outcomes may include brainstorming, sharing past experience, and identifying how to collaborate to address the issue.

1:00 – 1:55 p.m. Lunch for Local Organization Idea Exchange Participants and UWP

Board Members Veranda

2:00 - 4:00 p.m. UW Regional Breakout Sessions Worthington Ballroom

Member participants will split off into groups with their self-identified regions. This is an opportunity to discuss issues and collaborate with other United Ways.

3:00 - 5:00 p.m. UWP Board of Directors Meeting Runyan Room

5:30 - 7:30 p.m. Dinner, Annual Membership Meeting and Keynote Speaker

Worthington Ballroom

**Shane Burcaw** will be this year's keynote speaker. Shane is an author, entrepreneur, award-winning blogger, Emmy winning producer, and inspirational speaker. Born with a progressive neuromuscular disease, Shane has been battling a weakening body since birth. Today, he shares his message of using humor to approach his problems, which seem to make them much easier to deal with. Laughing at My Nightmare is Shane's nonprofit organization with a mission to spread a message of positivity.



#### UNITED WAY OF PENNSYLVANIA STATEWIDE CONFERENCE

#### Thursday - June 22

8:30 - 9:00 a.m. Breakfast Buffet Worthington Ballroom

9:00 - 10:00 a.m. Opening General Session- United Way Worldwide U.S. Focus &

Support: A Conversation with U.S. President Mary Sellers

Worthington Ballroom

The United Way network is at a critical juncture in how we are working to achieve success. The challenges are great, but the opportunities are even greater. In this session, new U.S. President Mary Sellers will share about the work United Way Worldwide has been doing to dig deeper into what the most successful United Ways are doing well and how we can learn from their success. (Several of the breakout sessions to follow are deeper dives into what they have learned from this work.) Mary will also provide a snapshot of what's happening at the network level to enable us to work better together. Finally, Mary wants to hear directly from you during this session on what you feel our greatest opportunities are, and how United Way Worldwide can best support you and us in these opportunities.

**Speaker: Mary B. Sellers,** U.S. President, United Way Worldwide

10:00 - 10:15 a.m. Break

10:15 - 11:15 a.m. Breakout Sessions

Breakout Session 1: Partnering with Labor to Strengthen United Ways Kirkwood Room

This session will focus on how United Ways and labor unions can strengthen their relationships and establish two-way communication and partnership around the work our organizations do in their communities. The session will also include an update on the trends in labor participation as the economy changes and large plants are closing down or scaling back.

Speakers: Rick Bloomingdale, President, PA AFL-CIO Gregg Potter, President, Lehigh Valley Labor Council



#### **Breakout Session 2: Cultivating and Engaging Corporate Partners**

Waring Room

As competition increases for charitable dollars, United Ways must strengthen their corporate relationships and move beyond the traditional workplace campaign. Join us to hear how United Way Worldwide is approaching strengthening its relationships with Global Corporate Leaders (GCL) and how local United Ways can continue to be the philanthropic partner of choice. Similarly, employers need the help of their United Way partners to run effective campaigns. Learn how you can help the employers increase their engagement in United Way by participating in campaigns and events throughout the year by hearing how Wegmans Pennsylvania Distribution Center engages with the United Way.

**Speakers: Mike Kerkorian,** Director, Corporate Relations, United Way Worldwide **Kristine Verba,** Human Resources Manager, Wegmans

11:30 a.m. - 12:30 p.m. Lunch Delaware Room

12:45 – 2:00 p.m. General Session: Fundraising Basics for a Changing

Charitable Landscape Worthington Ballroom

Although impact and fundraising are inter-related, fundraising is at the heart of United Way's ability to do the impact work. Learn and share best practices for fundraising for United Way in today's rapidly changing world. Find out how to get back to some basics that have been identified by United Ways who are meeting their campaign goals. This conversation is informed by expertise from United Way Worldwide, which was gleaned from interviews with United Ways across the country, as well as prior experience from the higher education and healthcare sectors.

Speakers: Mike Kerkorian, Director, Corporate Relations, United Way Worldwide

JoAnne Troutman, President/CEO, Greater Susquehanna Valley United Way

2:00 - 3:00 p.m. Breakout Sessions

#### Breakout Session 1: Communicating Your Impact Strategies as Products Waring Room

Take a look at your work through your donors' eyes. Over 7 million donors raise their hands and invest in their community through United Way, but many still don't know what United Way does. When donors understand United Way's role in their community, they are more willing to invest in United Way. This session will give you a chance to practice and get feedback on your United Way pitch, teach the basics of product development, and share a process to engage donors in your community in your work. Hear from a United Way who's tested the approach in their community, and how it's changing their work to inform how you change yours.

**Speakers: Stephanie Chin**, Manager, Economic Mobility & Education, United Way Worldwide **Rebecca Forman**, Interim Resource Development Director, United Way of Greater Philadelphia and Southern New Jersey



#### **Breakout Session 2: Out-of-School Time**

Kirkwood Room

Hear from providers and advocates who are partners in promoting the benefits of out of school time activities (after school and summer learning programs). They will review the evidence base for these programs, highlight successes and challenges to OST programming, and discuss the current state of quality ratings for OST.

**Speakers:** Laura Saccente, PSAYDN Director, PA Statewide After-School Youth Development Network

**Beth Tomlinson**, Assistant Director, K-12 Education, United Way of the Greater Lehigh Valley

3:00 - 6:30 p.m. Various Activities on the Resort

6:30 - 8:30 p.m. Reception (Cash Bar & Picnic Dinner) North Veranda

Friday – June 23

8:00 – 8:30 a.m. Breakfast Buffet Worthington Ballroom

8:30 - 9:30 a.m. General Session: UWP Advocacy Updates and Strategies

Moving Forward Worthington Ballroom

Staff will discuss updates and action needed to support priorities such as federal EITC and CTC advocacy, statewide 2-1-1 and the status of the PA state budget.

Speakers: Kristen Rotz, President, United Way of PA

Maggie Livelsberger, Public Policy and Communications Manager, United Way of PA

9:30 - 9:45 a.m. Break

9:45-10:45 a.m. General Session: What does collective impact really mean, and

will it work in my community?

Worthington Ballroom

This session will feature someone who is a nonprofit leader working in community impact. It will offer not only an overview of the definitions and key elements of collective impact, but also provide some practical advice about how organizations can embrace collective-impact concepts even when they are not running a collective impact model.

**Speaker: Dan Jurman,** CEO, Community Action Program of Lancaster County



11:00-Noon

# General Session: How to Identify Planned Giving Prospects and Get the Conversation Started Worthington Ballroom

Join Chad Barger, CFRE, for an introductory planned giving session. In this 60 minute session, you will learn how to find planned giving prospects from both within your database, and from outside your organization. Chad will also cover how to get the meeting, bring up the topic and the best way to follow up afterward. Attendees will leave the session feeling much more confident about how a basic planned giving program can fit into their existing campaign structure.

Speaker: Chad Barger, Principal, Productive Fundraising

Noon Conference Ends



#### **Conference Speakers**



CHAD BARGER
Principal
Productive Fundraising
<a href="mailto:chad@productivefundraising.com">chad@productivefundraising.com</a>

Chad Barger is a nonprofit fundraising and board strategist. Through coaching and training, Chad teaches charities how to raise more dollars by working smarter, not harder. He is Principal of the firm Productive Fundraising which specializes in training nonprofit boards of directors and bringing new growth to stagnant fundraising operations.

Chad is a self-proclaimed "productivity geek" and "systems guy." He works with his clients to implement simple processes and procedures that produce big results, when done consistently. He has leveraged this to establish a national reputation as a fundraising productivity expert and maintains a thriving coaching practice. He publishes a popular weekly email newsletter, The Productive Fundraising Weekly Journey, which provides video fundraising tips, resources, and five great fundraising articles from around the web. Chad frequently speaks at major nonprofit conferences. He is a Master Trainer for the Association of Fundraising Professionals and is a contributor to their industry-leading magazine, Advancing Philanthropy.

He is also a passionate arts advocate and raises vital support for the arts in his community through the Cultural Enrichment Fund (Harrisburg, PA). He splits his time between serving as a fundraising practitioner and a fundraising consultant. This allows him to bring fresh, real world, tested recommendations to his consulting clients.

Chad has spent his entire career as a fundraiser. He has worked in large shops and small in a variety of sectors (higher education, social services & the arts). He has built fundraising programs from the ground up, rebuilt fundraising programs back to their former glory and taken stagnant organizations to the next level. The campaigns that he has worked on have raised in excess of \$30 million dollars for the charities that he's had the honor of serving.



President
PA AFL-CIO
president@paafflcio.org

Richard (Rick) Bloomingdale became the fourth President of the Pennsylvania AFL-CIO on June 1, 2010 following his unanimous election by delegates attending the 39<sup>th</sup>Pennsylvania AFL-CIO Convention in Pittsburgh. That Convention also marked the 50<sup>th</sup> Anniversary of the formation of the Pennsylvania AFL-CIO.



Prior to his election as President, Rick served as the Secretary-Treasurer of the Pennsylvania AFL-CIO since June 1, 1994. He began his career in the labor movement with AFSCME in 1977. From Project Staff Representative of Local 449, to AFSCME International to State Political/Legislative Director for AFSCME Council 13, Rick has worked tirelessly to ensure workers' rights. He was a driving force in the enactment of agency shop legislation in Pennsylvania which was vital to workers and their families.

In 1992, Rick worked, on loan from AFSCME in Little Rock, Arkansas as Labor Liaison for the Clinton for President Campaign and used his knowledge and experience to coordinate labor issues in the formation of the campaign.

Rick, in his role as an officer at the PA AFL-CIO, serves and has served on various Boards. In 2003, he was appointed by Governor Rendell and confirmed by the Pennsylvania Senate to serve on the Unemployment Compensation Board of Review. He was appointed in 2005 to serve the Board as Chairman, which he did for almost 9 years. He still serves on this Board as a member.

He is currently serving on the General Board of the AFL-CIO, President of the AFL-CIO Northeast Council, Director at Ameriserv Trust & Financial Services Bank, Vice President of the National Council Senior Citizens USA Housing-Development Corporation, and the AFL-CIO Appalachian Council as a Board Member.

Rick also served as a member of the following boards over the years: The United Way of Pennsylvania, Drug-Free Pennsylvania, Inc., Delta Dental of PA, and Treasurer of the Keystone Research Center. Rick has lectured on Workforce Development at the U.S. Army War College in Carlisle, PA.



STEPHANIE CHIN
Manager Economic Mobility & Education
United Way Worldwide
Stephanie.Chin@uww.unitedway.org

Stephanie Chin strives to help everyone operate near their potential while expanding it, and has spent her entire career working in mission-driven work for nonprofits. Stephanie has worked in Impact for United Way Worldwide for five years, notably expanding the number of MyFreeTaxes users from 50,000 to over 200,000 users from 2012 to 2014.

Stephanie has worked in nonprofits across the country. She started her career writing grant reports at Mary's Center for Maternal and Child Care, Inc., whose CEO was recently featured on <u>United Way's Hero Effect</u>. She led a team providing child care subsidies in San Francisco at Wu Yee Children's Services. As primary full-time staff for the Overnight leading a team of coaches, Stephanie helped raise \$2.7 million for the American Foundation for Suicide Prevention and raise awareness about mood disorders.

Stephanie earned a Bachelor in Arts with a double major in English and Political Economies of Industrialized Societies at University of California, Berkeley, as well as a Juris Doctorate/Masters in



Business Administration from Emory University in Atlanta. During her graduate program, she was an Education Pioneer fellow who analyzed stakeholder surveys for Green Dot Public Schools, conducted legal research on school board responsibilities to special education students with Mental Health Advocacy Services, provided legal assistance to rural economic development nonprofits with Georgia Legal Services Program, and analyzed 2010 Georgia state election candidates for child-friendly platforms at Voices for Georgia's Children.

She has served on the board of the Young Nonprofit Professionals Network in New York City and the Cal Alumni Club of Washington DC.



#### **REBECCA FORMAN**

Interim Senior Vice President of Resource Development United Way of Greater Philadelphia and Southern New Jersey <a href="mailto:reg">rforman@uwgpsnj.org</a>

Rebecca Forman is the Interim Senior Vice President of Resource Development at United Way of Greater Philadelphia and Southern New Jersey. She is responsible for leading and promoting a multi-year strategic direction for Resource Development that includes workplace campaigns, corporate gifts, grants, individual donations and events.

Before joining United Way, Rebecca held various positions at the Free Library of Philadelphia Foundation including Director of Individual Giving.

Rebecca holds a Masters in Business from the Fox School of Business at Temple University and a B.A. from the Pennsylvania State University.

Rebecca lives with her husband and two children in Wynnewood, Pennsylvania



**DAN JURMAN** CEO

Community Action Program of Lancaster County djurman@caplanc.org

Dan got his start in nonprofit work over 30 years ago providing summer enrichment programing to atrisk youth in places like Camden, Newark and Atlantic City. He has a Bachelor's Degree from Rowan University and a Master's Degree from Lancaster Theological Seminary. For the past 17 years he's served in senior leadership roles in various nonprofits, almost all with a focus on serving the poor and the vulnerable. He left Lancaster in 2011 to become the CEO of the University Area Community Development Corporation in Tampa, where he led several collective impact and public health collaboratives focused on reducing poverty and violence in one of Florida's most impoverished communities. Since July 1<sup>st</sup> of 2015 he's been serving as the CEO of the Community Action Partnership of Lancaster County, is a member of the Lancaster Housing Opportunities Partnership Board of Directors and just completed serving as the Chair of the Mayor's Commission to Combat Poverty.





MIKE KERKORIAN
Director, Corporate Relations NYC
United Way Worldwide
Mike.Kerkorian@uww.unitedway.org

Mike Kerkorian serves as the Director of Corporate Relations for United Way Worldwide. He manages the global relationships for Fortune 500 companies headquartered in New York and Connecticut such as Macy's, American Express, and Pitney Bowes. His efforts focus on corporate social responsibility to help maximize fundraising, volunteerism, and the employee philanthropic experience. He also consults with local United Ways on fundraising best practices and is a facilitator of United Way's Resource Development 101 course.

Mike spent over five years working at Heart of West Michigan United Way where he held several fundraising roles including Vice President of Resource Development. While in Michigan, he received recognition through his service with the local Chamber of Commerce and the Young Nonprofit Professionals Network including being named Young Nonprofit Professional of Year in 2015. Before joining United Way, he worked in relationship management for a Boston-based investment management firm supporting foundation, endowment, and public fund clients. He holds a BA from Middlebury College in Vermont as well as an MBA from Boston University. In his spare time he enjoys traveling, playing tennis, and running.



GREGG POTTER
President
Lehigh Valley Labor Council
greggp@unitedwayglv.org

Gregg Potter serves as the Senior Director for Labor Relations for the United Way of the Greater Lehigh Valley. He began his relationship with the United Way serving on the board from 2003 to 2009. Gregg joined the United Way Greater Lehigh Valley staff as the AFL-CIO Labor Liaison in 2009. Prior to the United Way, Gregg worked for Verizon for 18 years and also spent over a decade in specialty retailing. His current responsibilities include managing a portfolio of individual and corporate donor accounts in excess of \$3.5 million. Gregg also coordinates volunteer activities with various local union members to enhance United Way investments. Gregg serves on the United Way Public Policy Committee, which determines legislation and issues the United Way will engage in. Gregg leads the Resource Development team in planning new account engagement and last year brought in over \$300,000.00 in new donor dollars.

Gregg also directs the TeenWorks<sup>™</sup> program, which began in 1999. Half of the board members are school age children from middle and high schools while the other half consists of local union members. Together, they meet monthly and view presentations for community service projects designed and implemented by local youth organizations. Since its inception, TeenWorks has provided funding for 256 Eagle Scout projects and over 300 other projects throughout Lehigh and Northampton Counties. The TeenWorks board also plans and completes two community service projects per year.



Gregg works with the Pa. Department of Labor & Industry when companies announce significant layoffs or a shutdown. He is part of the Rapid Response team that alerts displaced workers about opportunities regarding education, re-employment, unemployment compensation, social service programs and interim health insurance coverage. He also coordinates support efforts for workers when strikes or work stoppages occur.

Gregg serves on the Lehigh Valley Workforce Investment Board and is finishing his fourth term as President of the Lehigh Valley Labor Council. The Lehigh Valley Labor Council represents over 54,000 union members in Northampton and Lehigh Counties.

Gregg lives in Topton Pa. with his wife Marianne and daughters, Victoria & Sara Jo.



LAURA SACCENTE
PSAYDN Director
PA Statewide After-School Youth Development Network
Isaccente@csc.csiu.org

Laura Saccente joined as the network director for the Pennsylvania Statewide Afterschool/Youth Development Network (PSAYDN) in April 2015. Working with the PSAYDN steering committee, partners and stakeholders, she leads the network's strategic vision and advocacy efforts, as well as maintains and develops public and private support. She provides expertise in education policy issues, association/non-profit advocacy, strategic communications, coalition building, grassroots mobilization and Out-of School Time (OST)/Afterschool programming. Laura has nine years of experience as director of governmental relations for the Association of Pennsylvania State College and University Faculties (ASPCUF), where she organized hundreds of legislative meetings, led successful PAC fundraising campaigns, and presented regularly at leadership workshops. She previously worked in the Pennsylvania House of Representatives under two legislators. Laura received a bachelor's degree in speech communications and master's degree in political science from East Stroudsburg University. She is a 2005-06 graduate of the Pennsylvania Education Policy Fellowship Program, currently serves a board member of the Pennsylvania School-Age Child Care Alliance (PENN SACCA) and participates on the Penn State Pro Wellness Advisory Board. She also serves on the Pennsylvania State Workforce Development Board Youth Council, statewide STEM Advisory Committee and is a partner with the Carbon-Schuylkill-Luzerne (CSL) Stem Learning Ecosystem, one of four Stem ecosystems recognized in Pennsylvania.





MARY SELLERS
U.S. President
United Way Worldwide
mary.sellers@uww.unitedway.org

Mary has more than 25 years in leadership roles in the non-profit sector, including over 15 years of CEO experience. Prior to United Way, she held leadership and governance roles in the museum field. In those roles, Mary learned the importance of maximizing membership networks, a skill critical to effectively leading a network of over 1,200 local United Ways throughout the U.S.

Mary holds a B.S. in Public Relations from the University of Florida, and an M.B.A from University of Iowa. She has completed professional education programs at Harvard University and The Getty Leadership Institute for Museum Management. Since 2013, Mary has served on the Executive Committee of the United Way Worldwide National Professional Council.

Currently, Mary serves in an appointed capacity on the Iowa Technology and Telecommunications Commission and Future Ready Iowa. She has served in a range of advisory roles within the museum, education and diversity space further demonstrating her commitment to community impact.



BETH TOMLINSON
Assistant Director, K-12 Education
United Way of the Greater Lehigh Valley
betht@unitedwayglv.org

Beth, Assistant Director of K-12 Education with United Way of the Greater Lehigh Valley, supports both the UWGLV education program investments and United Way Community Schools, in addition to leading the Lehigh Valley Summer Learning Coalition and the newly formed Lehigh Valley Trauma Informed Learning Collaborative. Beth has over 20 years of experience in juvenile delinquency, positive youth development, social work and social science research.



JOANNE TROUTMAN
President/CEO
Greater Susquehanna Valley United Way
<a href="mailto:jtroutman@gsvuw.org">jtroutman@gsvuw.org</a>

Joanne Troutman joined Greater Susquehanna Valley United Way as the President & CEO in 2015. Prior to that, she had spent fifteen years in advancement at Susquehanna University, Evangelical Community Hospital and, most recently, Camp Victory. Since 2004 when she moved into fundraising, she has been responsible for development teams at small, rural non-profits which have cumulatively raised nearly \$50 million in public and private support. Holding a bachelor's degree in journalism from



Susquehanna, she started her career as a reporter for a local daily newspaper. She has also been a freelance writer, taught as an adjunct at her alma mater, and served as a fundraising and strategy consultant for various small non-profits through her business CRAVE Consulting. Joanne lives in Mifflinburg, Pa., with her husband, Dave, and two sons, Max and Eli.



KRIS VERBA
Human Resources Manager
Wegmans
<a href="mailto:kristine.verba@wegmans.com">kristine.verba@wegmans.com</a>

A Schuylkill County native, currently working for Wegmans Food Markets in their Distribution Division.

Started her career in Human Resources working in the aluminum manufacturing field for over 20 years. Working for companies such as Cressona Aluminum, Alumax and Alcoa. She has held several positions in manufacturing Human Resources such as Employee Relations Administrative Assistant, Corporate Administrative Assistant, Benefit Specialist and Employee/Labor Relations Specialist.

Kris began her career with Wegmans in 2006 as the Human Resource Manager of their Pennsylvania Distribution Center (Retail Service Center).

Kris attended Alvernia University majoring in Human Resource Management and currently holds her PHR through SHRM. She is currently serving as Board President for the Schuylkill County United Way and past campaign chairperson for 2013. She is also a current Board member for Luzerne/Schuylkill Workers Investment Board (WIB) and member of the performance and evaluation committee for the WIB Board.

Kris recently received HR Professional of Year from the Northeastern PA Manufacturers and Employers Association and also serves as a co-chair for their Human Resource Roundtables.



# THANK YOU FOR ATTENDING THE 2017 UNITED WAY OF PENNSYLVANIA ANNUAL CONFERENCE! WE HOPE YOU ENJOY YOUR STAY.

IF YOU ARE TAKING PICTURES PLEASE TAG US ON FACEBOOK, INSTAGRAM, OR TWITTER AND USE #UWP2017CONF

- UWP STAFF