

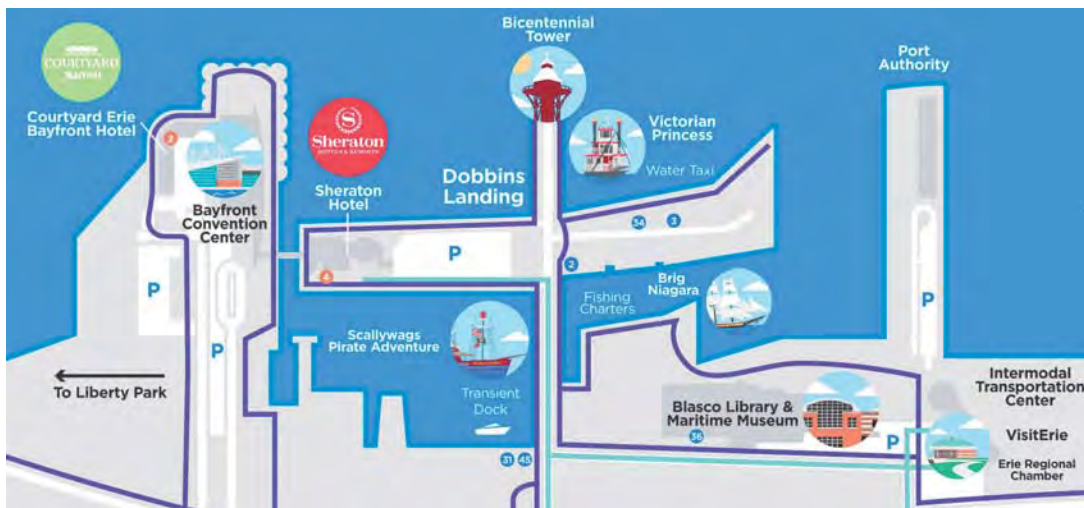
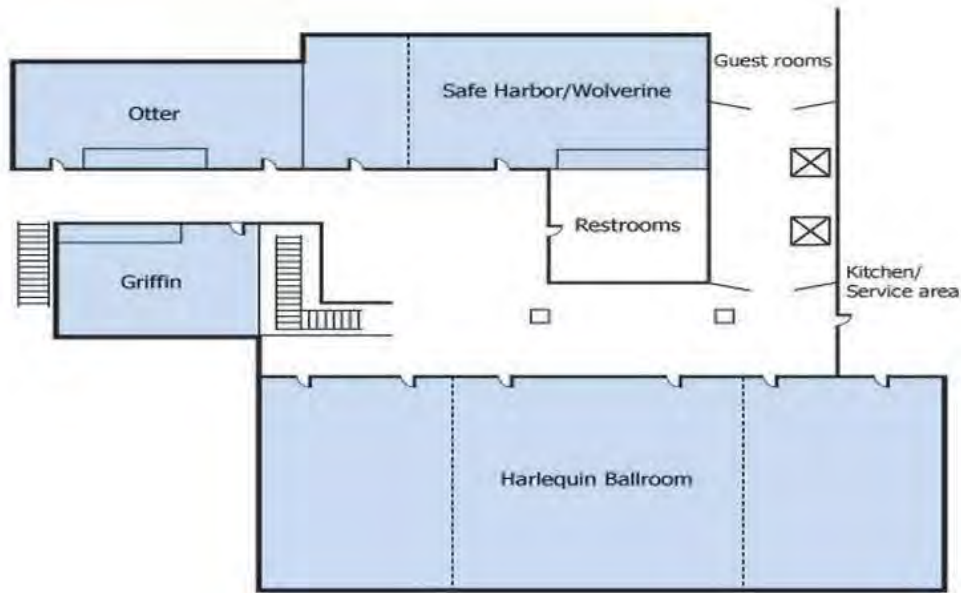
UNITED WAY OF  
PENNSYLVANIA

2018 ANNUAL  
STATEWIDE  
CONFERENCE

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June 20-22, 2018  
Erie Bayfront Sheraton





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# WEDNESDAY JUNE 20TH

## 10:00AM: UWP Welcome and UW Speed Dating

United Way of Pennsylvania will welcome our guests, briefly go over the schedule for the conference, and orient guests to the space. Local United Ways will then be broken up into an A and B group. The A group will move and the B group will remain seated. The groups will have a list of questions that local United Ways have submitted that they want to know about other United Ways. Enough time will be given to answer the questions and introduce the members to each other. Discussions will take place and will lead to brainstorming and sharing of knowledge, strengths, and needs.

*HARLEQUIN BALLROOM*

## 12:30PM: Lunch for Morning Participants & UWP Board Members presented by Mutual of America

*HARLEQUIN BALLROOM*

## 1:30PM: UW Regional Breakout Sessions

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.

*HARLEQUIN BALLROOM*



**UWP thanks our members for their hard work each year in supporting local education efforts.**

*SAFE HARBOR*

*HARLEQUIN  
BALLROOM*

## 3:00PM: UWP Board of Directors Meeting

## 6:00PM: Dinner Presented by FamilyWize, Membership Meeting, & Keynote Speaker Beth Zimmer

Dinner will be served and Kristen Rotz, President of United Way of PA, will give an update on the work completed by UWP in 2017 and so far in 2018. After this, Beth Zimmer, the co-founder and managing director of Innovation Collaborative in Erie, PA will present our Keynote address.

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# THURSDAY JUNE 21ST

HARLEQUIN BALLROOM

**8:00AM: Breakfast Buffet**

HARLEQUIN BALLROOM

**9:00AM: GenNext Ottawa: Innovation & Affinity**

*Michael Allen, Taline Jirian, Erica Howes, Alex Hosselet: United Way of Ottawa*

GenNext is an affinity and donor strategy designed by United Way Ottawa to engage the city's Millennial population. Developed for the long-term, the initiative aims to reach out to young adults in their 20s and 30s with a focus on creating direct and impactful connections and cementing relationships that will carry forward as they navigate through the various stages of their lives. This foundational stewardship is building trust in the United Way brand, value, and movement, moving it boldly into the future.

This session will inspire members to focus their efforts on the future and use new ideas to target the potential of the upcoming generations. United Way of Ottawa will speak about the passion that inspired them to focus on their GenNext efforts.

**10:30AM: Break**

**10:45AM: Breakout Sessions**

**Models for Building Local Partnerships with Labor**

*Ron Oliver, United Way of Erie & Jack Lee, Erie Crawford Central Labor President*

An United Way labor liaison and a volunteer community labor partner will both discuss what they can give to local United Ways. A strong partnership between United Way and labor is an asset to the whole community. These are two different ways to partner among many options for local United Ways in Pennsylvania.

SAFE HARBOR

**Global Results Framework: Power of Network Data**

*Hannah Beesley, United Way Worldwide*

How do we prove to our partners and donors that United Way is making a lasting, sustainable impact on our communities? United Way Worldwide wants to demonstrate the value of United Way. To do this, they developed the Global Results Framework. The Global Results Framework (GRF) shows the donors how their investments are helping the community, simplifies the data to key points, shares results across markets, and creates a compelling narrative for donors. United Ways that participate and complete the GRF have access to all the other data submitted by United Ways and are better positioned to engage with their corporate partners and donors. This session will go over what data is collected, how that data can be used to help local United Ways, and help local United Ways determine if they are ready to take part in GRF.

OTTER

**12:00PM: Lunch Presented by ABC Mouse**

HARLEQUIN BALLROOM

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## 12:45PM: Successful Cross-Market Corporate Partnerships

HARLEQUIN BALLROOM

*Mike Kerkorian, United Way Worldwide*

The Corporate Relationships Operating Group (CROG) has made significant strides in helping to determine what United Way partner companies need. A pilot group of 13 local United Ways and 10 companies launched an initiative to improve the companies' experience by centralizing the account management, increasing employee engagement, aligning CSR goals, and lifting the companies' brand reputation.

This adds significant value to what United Way can offer corporate partners while building a strong partnership between the companies and all United Ways working with the company. This session will inform you of the benefits and costs of investing in the Cross-Market Corporate Relationships model. If there is significant interest, a workgroup can be formed to begin brainstorming a PA partnership.

## 2:15PM: Breakout Sessions

SAFE HARBOR

### Positioning Your United Way for 2020: What You Must Plan & Start Doing Today

*Gary Goscenski & Kasey McGill, Perspectives Issue-Focused Consulting*

It is all too easy to get caught-up in the day-to-day challenges of managing your United Way. Long-term success comes from looking ahead at the big picture to understand the opportunities and identify the challenges that will shape your United Way in the future. In this session, you will learn about the greatest opportunities and most significant challenges United Ways will be facing now through 2020. We will show you the leading-edge strategies and methods your United Way should be planning and implementing today that will ensure your success in 2020. We will explain the strategies and methods that will maximize your impact, resources, and communication, using examples from United Ways that are ahead of the curve. We will discuss how to engage your board and staff in planning and implementing these strategies and methods. As Issue-Focused Consultants, we will share our experiences helping some of the most progressive and successful United Ways plan for their future. This session is designed for, and will be most beneficial to, Presidents/CEOs/Executive Directors who are responsible for leading and planning the future of their United Way.

OTTER

### Building Small Business & Entrepreneur Engagement

*Melanie Shildt, United Way of Blair County*

Small and locally owned businesses contribute to the overall well-being of communities throughout Pennsylvania. They have a powerful role in maintaining a healthy local economy and are vital to meeting the needs of their communities. There are 1 million small businesses in Pennsylvania and they employ 46% of PA employees. Research shows that, like all businesses, small businesses prefer to connect with community giving in a deeper way. This session will describe working partnerships between United Ways and small community businesses.

3:30PM: Break

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### 3:45PM Breakout Sessions

#### United Way ALICE: Working but Struggling

*Kristen Rotz, United Way of Pennsylvania & Sue Gilmore, FamilyWize*

ALICE is an acronym for Asset Limited, Income Constrained, Employed. This is a project of United Ways across the country. United Way of PA has joined the project to quantify and describe the families in our communities who are living paycheck to paycheck. These hardworking households are often forced to make awful choices between which necessities of life they can afford. The ALICE project uses standardized measures to better understand the scope of poverty in the communities. The project then uses the data to promote action for ALICE families in their communities. This session will describe what the ALICE project does and the goals it has. After the presentation, a group discussion will be held on community toolboxes to support and promote financial stability.

SAFE HARBOR

#### Building Bridges: Conducting Courageous Conversations around Race and Equity

*Darlene Slaughter, United Way Worldwide*

We are sometimes challenged with speaking candidly and listening openly, particularly as it relates to topics of inclusion. This session will provide support to having productive conversations around race, equity and inclusion. Hone your engagement and leadership skills by participating in this learning session. This experience will include tools, tactics, and strategies needed to fully and effectively engage stakeholders in the community. The session will highlight a proven framework for conducting difficult conversations around race, equity and inclusion through process, facilitation, participation and debriefing.

OTTER

### 6:30PM Victorian Princess Sunset Cruise

DOBBINS LANDING

We are pleased to offer our members this networking opportunity on the Victorian Princess! The cruise will have heavy hor d'oeuvres and a cash bar and will return to the dock at approximately 8:30pm. Please plan to board by 6:15pm and to bring a jacket or sweater because the evening can be chilly on the lake.



UWP appreciates the time and dedication our members have put into 2-1-1 in PA

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**FRIDAY  
JUNE 22ND**

**8:00AM Breakfast Buffet**

HARLEQUIN BALLROOM

**9:00AM: Youth Engagement Panel General Session**

HARLEQUIN BALLROOM

*Michael Allen, Taline Jirian, Erica Howes, Alex Hosselet: United Way of Ottawa & Titusville High School Student United Way*  
United Way is planning for the future and adapting to the new habits, desires, and needs of the upcoming generation. The millennials are in the workforce and poised to be the biggest contributors to United Way in future years, if United Way can succeed in keeping them affiliated with our causes and vision. The panelists will come together to discuss what their United Ways are pursuing, what has worked, what hasn't worked, and how they plan to evolve to continue to be successful throughout the coming years.

**10:00AM Break**

HARLEQUIN BALLROOM

**10:15AM: Presenting Data for Donors with the Imagination Library & the UWSWPA's Education Department General Session**

*Christy Crouse: Imagination Library, Laurie B. Root Senior Vice President: United Way of Erie County, & Chad Waldron, Ph.D.: University of Michigan - Flint*

*Jesse Sprajcar: Education Program Manager United Way of Southwestern PA*

**PART A:** Putting books into the hands of children. Who can argue with that? That's the premise of the Dolly Parton Imagination Library. Founded in the mid-1990s, the Imagination Library provides a monthly, high quality age appropriate book for children from birth until their fifth birthday at no charge to the families. But, the Imagination Library is much more than a "feel good" initiative. It's a significant resource for communities to address low literacy skills in young children. The research around reading and early childhood literacy, and later success in school, is deep and wide, and now there is original research demonstrating the strong connection between the Imagination Library program and literacy skills for school readiness. During this presentation, you will hear how United Way of Erie County incorporated the Imagination Library into its strategy to become a community impact organization. While the initial response was overwhelmingly positive, they listened to donors who wanted to know what the impact is on local youth. That's when they partnered with Penn State Behrend's Susan Hirt Hagen Center for Community Outreach, Research & Evaluation to conduct an evaluation project, with amazing results.

**PART B:** After that presentation, United Way of Southwestern Pennsylvania's Greensburg office's education department will present how it uses formal and informal data to present results to public and private stakeholders throughout the year. They are very fortunate to have a large foundation community that believes in the work, both existing and experimental. They also leverage government grants as they become available through the Office of Child Development and Early Learning. During the program we will discuss how to deliver useful data to fulfill grant requirements, while staying true to the education community we serve. What type of data do we collect? How do we get the data? What is more useful, large data sets or smaller community specific data?

**DOUBLE FEATURE!**

**12:00PM: Conference ends, see you next year!**



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## CONFERENCE SPEAKERS

### **Beth Zimmer** **Co-founder and Managing Director** **Innovation Collaborative**

Beth Zimmer is a life-long resident of Erie County and believes that Erie is a great place to live, work, and play. She is dedicated to improving the community by creating sustainable, healthy change and growth. That's why she helped co-found the Innovation Collaborative in 2014. The Innovation Collaborative is a non-profit dedicated to supporting the development and improvement of the entrepreneurial culture in the Erie region. The Innovation Collaborative serves as a back bone support organization, advocating & educating, facilitating collaborations, and measuring & communicating outcomes for northwest Pennsylvania's entrepreneurial ecosystem.



### **Michael Allen** **President & CEO** **United Way Ottawa**

Michael's tenure at United Way has been marked by milestones in moving both the organization and the community sector to more evidence-based, research-driven approaches to addressing the circumstances of Ottawa's most vulnerable people. During his time, United Way has seen an increase in philanthropic and other revenues, partnerships, and impact in the community. Some of the achievement's Michael is most proud of is United Way's response to the refugee crisis in 2015, the rapid response to Ottawa's opioid crisis in 2017, and the defining of organizational goals that speak to some of the city's greatest challenges: such as ending youth homelessness, making sure every young person graduates, and ensuring that no senior is vulnerable.



### **Erica Howes** **Community Relations & GenNext Outreach** **United Way Ottawa**

Erica Howes manages community relations and outreach for the GenNext program at United Way Ottawa as part of the internal GenNext team. She coordinates volunteer engagement programs and marketing events, and helps manage the GenNext Advisory Cabinet as well as the program's web and social communications. Erica applies her background in journalism to her interest in using storytelling as a tool for change.



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### Alex Hosselet Digital Marketing Manager United Way Ottawa

Alex Hosselet is a marketing, communications, and business strategy professional with many years working in education and non-profit. He applies his knowledge of digital outreach and analysis to the GenNext portfolio as part of the internal GenNext team, overseeing the roll-out and execution of e-based communications and solicitation strategies.

### Taline Jirian Senior Manager of Experience Marketing United Way Ottawa

Taline oversees the strategic direction of United Way Ottawa's GenNext movement, which includes the management of the internal GenNext team, and the GenNext+ Giving Circles which engage young people to support Youth Mental Health, LGBTQ+ and Social Enterprise initiatives supported through United Way. Taline is the brand experience curator and marketer at United Way Ottawa. With a strategic emphasis on awareness and recognition, she works through traditional and non-traditional channels including art installations, video and social content, marketing concepts and strategies, and special events.



### Mike Kerkorian Director, Corporate Relations United Way Worldwide

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 Deloitte. 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. Before joining United Way, he worked in relationship management for a Boston-based investment management firm supporting endowment and foundation 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.



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### **Christy Crouse** **Regional Director** **Dollywood Foundation USA**

Christy Crouse is the Regional Director for the Dollywood Foundation. In her role, she strategically develops and pursues large scale expansion of Dolly Parton's Imagination Library. In addition, she provides assistance and oversight to local Imagination Library affiliates across a 22 state region

Christy believes early childhood literacy is an effective tool for addressing tough social issues that span far beyond the system of academia.

Christy holds a BS from the University of Virginia and an MA from NOVA Southeastern University.



### **Chad Waldron, PhD** **Assistant Professor** **University of Michigan-Flint**

Dr. Waldron joined the University of Michigan-Flint in September 2016 and teaches literacy coursework in the literacy education graduate program and the elementary education undergraduate program. He earned his Ph.D. in Curriculum, Instruction, and Teacher Education with a Language and Literacy Studies Specialization from Michigan State University in May 2014. Prior to UM-Flint, he was an assistant professor of Language and Literacy Studies at Penn State Behrend. His research focuses on promoting family involvement in young children's literacy development and in improving professional learning for early childhood and elementary educators.



### **Laurie Root** **Senior Vice President** **United Way of Erie County**

Laurie is the Senior Vice President at United Way of Erie County. She works closely with the President in organizational management and team leader coordination; strategic plan implementation; and oversees resource development strategies and initiatives. Prior to returning to Erie in 2010 to join the team at United Way, Laurie was the Vice President, Education & Program Development at Women in Cable Telecommunications in the Washington DC area. She received the 2014 Athena Leadership Award and the 2015 Women's Roundtable Woman of the Year Award. She is past president of the Rotary Club of Erie. Laurie is a graduate of Hollins University in Virginia and a Class XVIII Fellow of the Betsy Magness Leadership Institute, a women's executive leadership program run through the Center for Creative Leadership.



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### **Jesse Sprajcar** **Education Program Manager** **United Way of Southwestern Pennsylvania**

Jesse Sprajcar is the Education Program Manager at United Way of Southwestern Pennsylvania. For nearly 15 years, Jesse has worked within the non-profit education and public education field to develop positive relationships with parents, teachers, administrative personnel and students at all levels. He currently serves on several committees and partnerships throughout Westmoreland and Fayette County. Jesse has worked to establish processes and developed systems to promote efficiency while in the classroom and throughout his years in non-profit management. He has managed several grants throughout their life cycle, including four large federal 21st Century Learning Center multiyear grants and multiple foundation grants of varying size. As the cornerstone of his work, Jesse focuses on open communication with all stakeholders and data management throughout the process to ensure quality evaluation and reporting.

### **Ron Oliver** **Vice President Labor Division & Community Service** **Liaison**

#### **United Way of Erie County & PA AFL-CIO**

Prior to his current position, Ron worked at PHB for 24 years. As a member of the United Steelworkers Union 3199, he has held many positions including president and vice president among others. He was also a civil rights officer and was involved in committees. As a former union counselor, he attended classes to enhance his knowledge and to better serve his local. In 2008, he worked on the campaign of President Barack Obama in Erie-Crawford county. As a member of Victory Christian Center, he has worked with the young men and helped provide activities. Ron was born in Yazoo, Mississippi, but spent most of his life in Cleveland, Ohio. He was a track star in high school and earned a scholarship to Ohio State University, where he studied political science. He served in the United States Coast Guard for 8 years, receiving an honorable discharge. He has been married to Teresa for 35 years and has two beautiful children, Latanya and Christopher, and two grandchildren, Josiah and Justyce.



### **Jack Lee** **Erie Crawford Central Labor President**

Jack is the Summit Township Supervisor and is on the board of directors for United Way of Erie County, in addition to serving as the Central Labor President. He was born and raised in Erie county and graduated from Fort LeBoeuf School District in Waterford. After high school, he worked for a concrete contractor before starting a career as a union roofer in 1981. He married his wife, Denise, in 1982. During the past 29 years, they have traveled widely across the country and worked for Nascar race teams. They worked full time and spent many weekends on the road. Jack enjoys hunting, fishing, and riding his Harley.

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## **Gary Goscenski** Issue-Focused Consultant Perspectives Issue-Focused Guidance

Gary's 28 years of experience and expertise in working with United Ways, combined with his engaging, passionate, and high-energy delivery, leaves audiences excited and informed. He has made hundreds of speeches, from presenting keynotes at conferences sponsored or funded by United Way to providing workshops for individual United Ways. Gary weaves first-hand research with real-world examples in a way that allows everyone to achieve greater success at their United Way. He provides guidance to transform United Ways to an issue focus, which ensures that United Ways remain relevant in their communities, sustainable long-term, and generate measurable change.



## **Sarah Piper** Issue-Focused Consultant Perspectives Issue-Focused Guidance

Sarah has developed and shared information and ideas United Ways have used to implement community impact and diversify resources. Sarah is deeply passionate about United Ways. With this passion, Sarah guides United Ways in simplifying their messaging and communicating effectively. Sarah presents sessions and workshops that help United Ways effectively communicate on social media and engage the younger generation. Sarah earned her degree in public relations and nonprofit management from Western Michigan University. She provides guidance to transform United Ways to an issue focus, which ensures that United Ways remain relevant in their communities, sustainable long-term, and generate measurable change.



## **Melanie Shildt** Executive Director United Way of Blair County

Melanie began her tenure as Executive Director of United Way of Blair County on September 2, 2014. Prior to joining United Way of Blair County she spent 17 years working in the human service industry, primarily with non-profit agencies. She possesses a B.S. degree in Psychology from University of Pittsburgh, a M.S. degree in Psychology from Shippensburg University, and an M.B.A. from University of Phoenix. She lives in Pinecroft in the Bellwood-Antis School District and is married with two children, Taylor (19) and Arik (15). With her role at United Way of Blair County she currently serves on a number of committees and in service organizations



## **Hannah Beesley** Manager of Impact & Management United Way Worldwide

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### **Susan Gilmore** **Executive Director of Community Engagement** **FamilyWize**

Susan Gilmore is the Executive Director of Community Engagement for the FamilyWize Community Service Partnership. Almost every family in the United States today faces health or financial challenges. FamilyWize provides prescription assistance and information to help everyone be healthy, physically and financially. Susan is a member of the executive team, helping to set strategic direction for the partnership and is responsible for leading the rapidly expanding network of like-minded organizations, currently comprised of over 50,000 national and local non-profits and agencies. Together the FamilyWize partnership has helped more than six million people improve their quality of life, reducing the cost of their medicine so far by more than \$500 million.

### **Kristen Rotz** **President** **United Way of Pennsylvania**

Kristen Rotz, who began her position as President of the United Way of Pennsylvania in October 2014, is an experienced nonprofit association leader. Kristen believes United Way is integral in bringing key stakeholders together from every sector, every political philosophy and every walk of life to help weave the fabric of healthy communities which offer opportunity for all. She has advocated for many human services programs throughout her career, and understands how to influence policy in Harrisburg. Prior to working for United Way of Pennsylvania, Kristen served as executive director of the Pennsylvania Association of County Administrators of Mental Health and Developmental Services. Before that, she was Government Relations Manager for the County Commissioners Association of Pennsylvania and Regulatory Reform Director for the Pennsylvania Farm Bureau.



### **Darlene Slaughter** **Vice President and Chief Diversity Officer** **United Way Worldwide**

Darlene Slaughter is leading efforts to expedite and advance worldwide diversity and inclusion strategies, partnerships and initiatives working closely with community-based United Ways, as well as corporate and community partners. She is also a frequent speaker on topics such as changing management, women's initiatives, financial literacy, leadership development and concepts on diversity and inclusion. Her work in diversity and inclusion has been recognized in various ways. She has won many awards and honors including SAVOY's 2012 Top 100 Influential Women in Corporate America, Profiles in Diversity Journal's list of Women Worth Watching, Black Enterprises' Top Executives in Diversity and Heart & Soul's Women of Substance in Finance.



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## **THANK YOU!**

United Way of Pennsylvania is thrilled to continue to offer support and education to our members at our 2018 conference. We hope you enjoy your time here! Please look out for a survey of our conference next week where you will have the opportunity to offer feedback.

If you are taking pictures, posting on twitter, or on facebook, please tag us! #UWP2018Erie



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