

UNITED WAY OF PENNSYLVANIA

IDEA EXCHANGE AND
STATEWIDE CONFERENCE AGENDA

June 15 - 17, 2016
Toftrees Golf Resort and Conference Center



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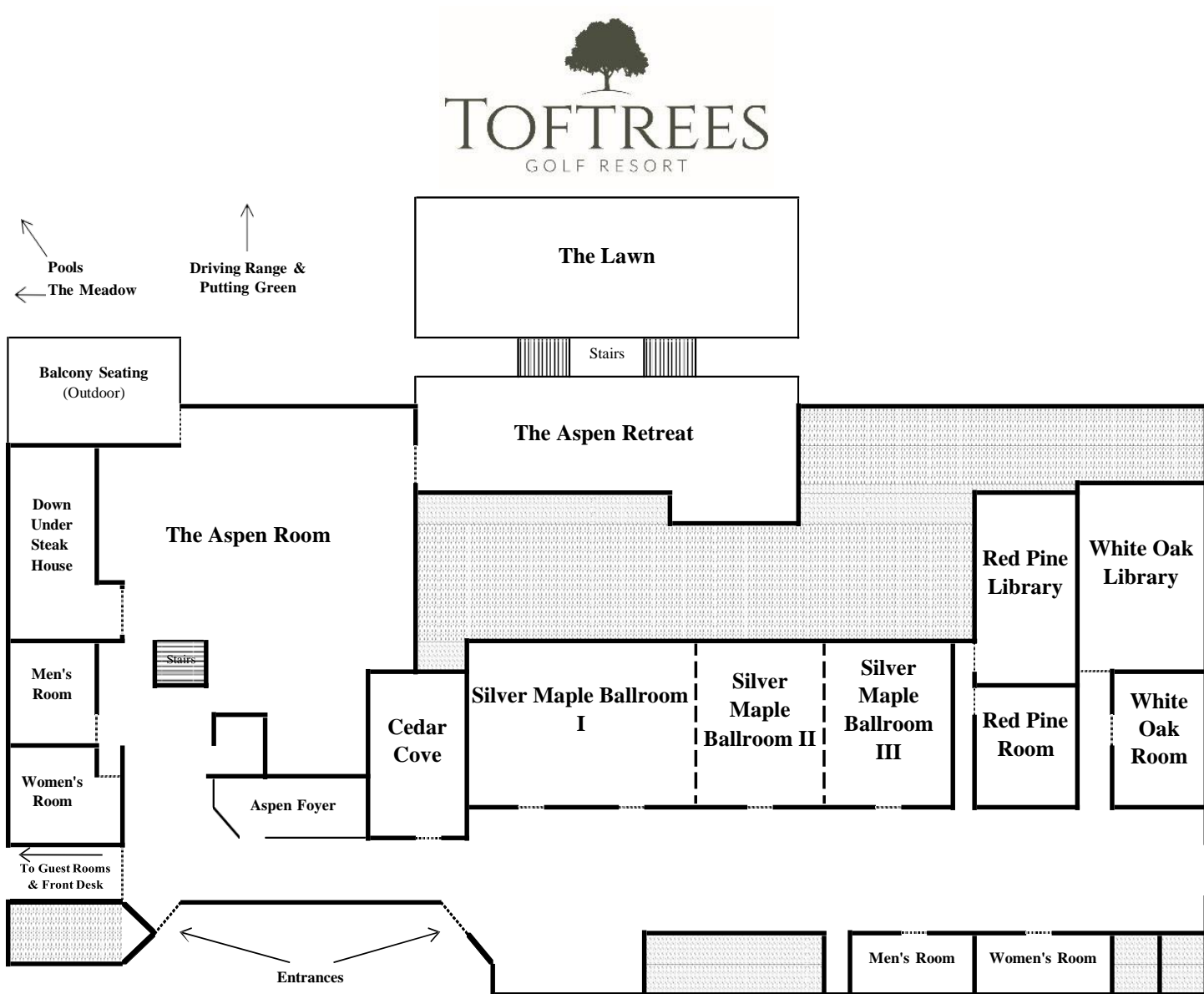
United
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LIVE UNITED



Toftrees Golf Resort and Conference Center Diagram





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United Way of Pennsylvania Annual Conference Pre-Conference Meetings

Wednesday – June 15

10:00 a.m. - 1:00 p.m. UWP Local Organization Idea Exchange Silver Maple I

This session will run with a pre-determined agenda on issues affecting our members. For any given topic, discussion outcomes may include brainstorming, sharing past experiences, identifying areas to collaborate to address the issue, prioritizing the issues for which UWP can assist, etc.

1:15 p.m. – 2:15: Lunch - UWP Board of Directors and Local Organization Idea Exchange Participants Aspen Room

2:30 - 4:30 p.m. UWP Regional Breakout Sessions Silver Maple I

Participants will split off into groups with their regions. This is an opportunity to discuss issues and collaborate with other United Ways in specific regions.

3:00 - 5:00 p.m.: UWP Board of Directors Meeting White Oak Library

5:30-7:30 p.m.: Banquet Dinner and Annual Meeting of the Members

Keynote Speaker: Scott Shirley, Executive Director & Founder, Uplifting Athlete



United Way of Pennsylvania Annual Conference Statewide Conference Meetings

Thursday – June 16

8:15 - 9:15 a.m.

Breakfast Buffet

Aspen Room

9:00 - 10:15 a.m.

Opening General Session- Social Media Development

Silver Maple I

A session discussing how social media has changed the way United Ways are able to market their information and engage individual donors. Hear need-to-know information on which social media outlets to use and how to effectively use them. There will also be a discussion on how to properly put together a social media policy for your United Way.

Speakers: Brittany Crampsie, Associate, Triad Strategies
Trey Miller, Strategic Communications Coordinator, Penn State College of Communications

10:15 - 10:30 a.m.

Break

10:30 - 11:45 a.m.

Breakout Sessions

Breakout Session 1: Moving to Collective Impact

White Oak Library

Collective impact models involve collaboration across sectors to tackle deeply-entrenched social problems, and backbone organizations support and facilitate this work. United Ways considering or implementing collective impact will have the opportunity to discuss their concerns or issues with other United Ways who have implemented Collective Impact initiatives already or who are in the process.

Speakers: Andrea Heberlein, Lead Director- Community Impact, United Way of Lancaster County
Patricia Giles, Executive Vice President/Chief Impact Officer, United Way of Berks County



Breakout Session 2: Engaging Tocqueville Donors

Cedar Cove

A session on how to develop and engage Tocqueville donors in United Ways of all sizes.

Speakers: David Lewis, President, United Way of the Greater Lehigh Valley
Michael Albert, Executive Director, United Way of Monroe County

Breakout Session 3: Strategic Planning for the Future

Red Pine Library

A session on how to effectively and strategically plan for the future. This includes engaging your staff and board volunteers in the strategic planning process.

Speaker: Patrick Ball, President & CEO, CTY Consulting Group

11:45 a.m. - 12:45 p.m.

Lunch

Aspen Room

1:00 - 1:45 p.m. General Session – Member Updates from UWP

Silver Maple I

Staff will review the current status of budget negotiations and advocacy for statewide 2-1-1. The new “members only” section of the UWP website will be unveiled with resources members can begin using immediately.

Speakers: Kristen Rotz, President, UWP
Maggie Livelsberger, Public Policy and Communications Associate, UWP

2:00 - 3:15 p.m. Breakout Sessions

Breakout Session 1: Board Engagement and Attracting Volunteers

White Oak Library

A session on how to engage Board members and run a United Way Board that is effective. Also, a discussion on attracting and managing volunteers. Millennial, career and retired volunteers and their differences and needs.

Speakers: Melissa Fulton, Executive Director, United Way of Clarion County
Heidi Neuhaus, Director of the Volunteer Center, United Way of the Capital Region

Breakout Session 2: Human Trafficking

Cedar Cove

A session focusing on the current status of human trafficking and what United Ways can do to help victims and bring awareness to their communities.

Speaker: Rhonda Hendrickson, Director of Violence Intervention & Protection Services, YWCA
Greater Harrisburg



Breakout Session 3: Moving to Community Impact

Red Pine Library

The United Way community impact model shifts away from the traditional allocations process and focuses resources on top priorities within communities to achieve lasting change. United Ways moving toward Community Impact will have the opportunity their concerns or issues with other United Ways who have moved to community impact already or are in the process.

Speakers: Ginny Crake, CEO, Berwick Area United Way
Bill McKinney, President, United Way of Laurel Highlands
Bill Jackson, President, United Way of Erie County
Bill Jones, President, United Way of Wyoming Valley

3:15 - 3:30 p.m. Break

3:30- 4:45 p.m. General Session: Advocacy and United Ways

Silver Maple I

Speakers: Jim Cawley, President & CEO, United Way of Greater Philadelphia & Southern New Jersey
Kristen Rotz, President, UWP
Maggie Livelsberger, Public Policy and Communications Associate, UWP

A discussion on how United Ways can effectively and efficiently navigate the political landscape and promote policy initiatives without jeopardizing their 501(c)3 status.

5:30 - 7:30 p.m. Reception (Cash Bar & Heavy Hors D'oeuvres) with Basket Raffle

Poolside –
Weather Permitting



Friday – June 17

8:00 - 9:00 a.m.	Continental Buffet	Foyer
9:00 - 10:30 a.m.	General Session- The Changing Landscape of Donor Development: Engaging Individuals	Silver Maple I

A session on how to effectively engage individuals as donors, with focus on online giving

Speakers: Katie Buseck, Marketing Communications Manager, United Way of Buffalo and Erie County
Lori Finch, Vice President of Community Giving, Kimbia

10:30 - 10:45 a.m.	Break	
10:45 a.m. – Noon	General Session- The Changing Landscape of Donor Development: Workplace Campaigns	Silver Maple I

Companies and United Ways with strong workplace campaigns will share tips for success.

Speakers: Lindsay Garman, Executive Assistant, Appvion
Gary Drapek, President, United Way of Lackawanna & Wayne Counties

Noon **Conference Ends**

Please watch for a link to an electronic conference evaluation which will be emailed to all participants. We value your feedback!



Conference Speakers



MICHAEL ALBERT

President and CEO
United Way of Monroe County
michael@unitedwaymonroe.org

Michael Albert joined the United Way of Monroe County in the Pocono Mountains of North-eastern Pennsylvania, as the agency's President and CEO, in May of 2015. While still relatively new to the world of United Way, Michael brings to the table over a decade of senior leadership experience in the health and human services sector. Much of this experience has come from working with global non-profit health, education and humanitarian organizations in countries such as Bangladesh, Mali, Azerbaijan, Malaysia, Liberia, Haiti and Thailand.

Michael has a Bachelor of Science in Psychology from McGill University in Montreal, Canada and a Masters in International Community Health from the University of Oslo in Norway. Michael is an active member of his community, sitting on his Township's Planning Commission, teaching as an adjunct professor at the local university - East Stroudsburg University - and sitting as a Board Member on several non-profits at a local and national level. Michael also maintains an active family life. He lives with his wife and their three children (daughter, aged 5, and sons, aged 4 and 2) adjacent to their family owned ski and golf resort in the beautiful Shawnee on Delaware, Pennsylvania.

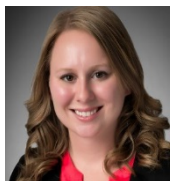


PATRICK BALL

Founder
CTY Consulting Group, LLC
pball@ctyconsulting.com

Patrick Ball has held a wide range of positions throughout his professional career in varied industries including banking, building materials distribution and healthcare. Prior to launching CTY Consulting Group in 2013, he held the position Director of Strategic Planning with WellSpan Health. In this role, Patrick helped set the strategic direction of the organization and consulted with and advised many internal clients on how to support the overall strategic direction of the organization. Over the past three years, Patrick has consulted for clients in a variety of industries including not-for-profit, civil engineering, community banking, manufacturing, healthcare, hospitality, and professional services. In addition to his extensive corporate experience, Patrick has deep involvement in the not-for-profit community as a volunteer.

Patrick holds a BS in Accounting from The Pennsylvania State University and an MBA from Johns Hopkins University.



KATIE BUSECK

Marketing Communications Manager
United Way of Buffalo & Erie County
Katie.buseck@uwbec.org

Katie Buseck is the marketing communications manager for the United Way of Buffalo & Erie County. In this position, she is responsible for planning, creating and executing a comprehensive marketing/communications program that promotes maximum public acceptance, awareness, understanding, and support of the work of United Way of Buffalo & Erie County. She is also the project manager for Western New York's only annual day of giving, Spring It On.

Prior, she was the marketing coordinator for a local law firm. She graduated from Buffalo State College with a BA in Public Communications and is the outgoing president of Social Media Club of Buffalo.



JIM CAWLEY

President and CEO
United Way of Greater Philadelphia and Southern New Jersey
jcawley@uwsepa.org

Jim Cawley is president and CEO of United Way of Greater Philadelphia and Southern New Jersey (UWGPNJ), where he leads the organization's work to improve Education, Income and Health for the region's most vulnerable populations, while also strengthening the regional safety net.

Jim has spent the majority of his career in the service of others, both regionally and nationally, developing productive relationships and leading large groups of constituents to success. As the 32nd Lieutenant Governor of the Commonwealth of Pennsylvania, Jim honed a unique understanding of how United Way's Impact areas connect and how strategic improvements in Education, Income and Health can lift the entire region. Prior to being elected to statewide office, Jim served on the Bucks County Board of Commissioners, as Chief of Staff to State Senator Tommy Tomlinson, and as a member of the board of the Bristol Township School District.

A native of Levittown, PA, Jim earned a bachelor's degree in political science and a law degree from Temple University. He resides in Wrightstown, PA, with his wife Suzanne and their son Nicky.



GINNY CRAKE

CEO

Berwick Area United Way

g.crake@berwickareaunitedway.org

Ginny H. Crake was born in Berwick, Pennsylvania and graduated from Berwick Area Senior High School in 2002. She went on to achieve a Bachelor's Degree in International Politics at Pennsylvania State University in 2006. From State College, she moved to Washington, DC and interned for Senator Spector. Then she found herself in a small non-profit called the Alice Ferguson Foundation where she was the volunteer coordinator for an annual event called the Potomac River Watershed Cleanup. After a year in that position she was elevated to Director of the Trash Free Potomac Watershed Initiative.

In 2011, American Rivers became her next employer where she was once again coordinator of a national event called National River Cleanup. Upon moving back to Berwick in 2012, Ginny found her present job as Chief Executive Officer of the Berwick Area United Way.



BRITTANY CRAMPSIE

Associate

Triad Strategies

bcrampsie@triadstrategies.com

Brittany came to Triad Strategies after a stint as the youngest and first female Managing Editor of PoliticsPA.com, the premier political blog in the state. While she was there, the pseudonym for the editor, Sy Snyder, was named to Washington Post's list of best state capitol reporters. Before that, she was a freelance local government reporter for WFMZ 69-News in the Lehigh Valley.

She served as a panelist speaking about media & politics at a multitude of conferences including the Pennsylvania Progressive Summit, the PA College Democrats, the PA Sheriffs Association, the Center for Women in Politics, and delivered the Ben Bronstein Lecture on Ethics and Public Relations at Penn State University in 2015. Brittany appears regularly on PCN Call-In and on CBS 21's Face the State.

She is a Phi Beta Kappa, summa cum laude graduate of Lehigh University where she majored in Political Science with minors in Philosophy and Mass Communications. She earned a Master of Arts in Politics and Policy, also from Lehigh University, as a Presidential Scholar.



GARY DRAPEK

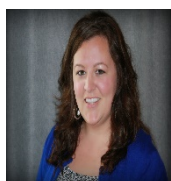
President
United Way of Lackawanna & Wayne Counties
gdrapek@uwlc.net

Gary Drapek is the President and Chief Professional Officer for the United Way of Lackawanna County.

Gary joined the United Way of Lackawanna County in 1987 as the Vice President of Marketing and Public Relations, a position he held for 12 years. During this time he served as a national consultant, and workshop presenter on numerous topics, including; Crisis Communications, Media Relations, and Effective Communications Techniques.

In 1999 Gary left United Way to become the Vice President of Communications for Condron & Company, a regional award winning advertising, public relations and marketing firm, based in Scranton, Pennsylvania.

He returned to the United Way in August of 2002 to accept the position of President and Chief Professional Officer.



MELISSA FULTON

Executive Director
United Way of Clarion County
clarionunitedway@verizon.net

Melissa Fulton is the Executive Director at United Way of Clarion County, where she has served since 2012. She is leading the organization, founded in 1971, in supporting strategic initiatives that advance the common good by supporting health, education and income stability throughout Clarion County.

During her tenure, Melissa has designed and implemented significant organizational improvements including creating United Way Impact Initiatives such as Community Cancer Care Fund, updating and revising the by-laws, creating a formal policy and procedure manual, developing a Board Member recruitment strategy and on-boarding manual.

Melissa is a current Board Member for United Way of PA, serving on the Nominating and Governance Committee. She is active in her church and volunteers for various activities throughout her community. Melissa is from Knox, PA where she lives with her husband Ian, and three children, Alannah (9), Everett (8) and Lochlan (6).



LINDSAY GARMAN

Executive Assistant

Appvion

lgarman@appvion.com

Executive Assistant to the Mill Manager at Appvion-Spring Mill. Appvion is headquartered in Appleton, WI. Our Spring Mill is located in Roaring Spring, PA. We are a fully integrated Pulp and Paper Mill and are celebrating our 150th year of operation. The mill was started at its currently location in 1866. I have been in my position at Spring Mill for 2 years. The main element of my job is to provide administrative support to the Mill Manager and his staff. I organize company events, such as retirement celebrations, recognition events, and customer visits. Along with this, I have many other responsibilities, one of which is being the Employee Campaign Coordinator for United Way of Blair County.

I currently live in Duncansville, PA with my husband and our two beautiful children. I have an Associate in Specialized Business Degree from Cambria-Rowe Business College in Johnstown, PA. I have spent my career in administrative roles with various companies in Blair and Bedford Counties. I have been on Relay for Life teams and served as a team captain for 2 years. I have also participated in Future Business Leaders of America as a Competitive Events Volunteer Judge and Test Writer.



PATRICIA GILES

Executive Vice President and Chief Impact Officer

United Way of Berks County

patgiles@uwberks.org

Pat has worked at United Way of Berks County for more than sixteen years, and is currently Executive Vice President and Chief Impact Officer. She came to United Way after having spent five years at Berks County Community Foundation, as Vice President of Programs and Grantmaking. Prior to that, Pat spent nearly 20 years serving as a “professional volunteer”, providing leadership and service to a variety of nonprofit organizations at a local, regional and national level, including the Junior League, Planned Parenthood, Beacon House, Burn Prevention Foundation, Leadership Berks and United Way.

Pat is a Berks County native and received a Bachelor’s Degree in Sociology and Psychology from Mount Holyoke College in South Hadley, Massachusetts. She and her husband, Attorney John Speicher have three grown children, five grandchildren and two dogs.



ANDREA HEBERLEIN

Lead Director, Community Impact
United Way of Lancaster County
heberlein@uwlanc.org

Andrea Heberlein is the Lead Director of Community Impact for United Way of Lancaster County where she helps lead and support community initiatives focused on improving educational, health, and financial outcomes for children, youth, and adults. Most recently, this work has involved incorporating the Collective Impact model to facilitate collaborative and systemic social change.

Andrea received her Masters of Social Work (MSW) from Millersville University. Her professional experience includes early care and education community work, service coordination for adults with disabilities, community systems development for children with disabilities, and directing a NAEYC accredited early childhood learning center. Andrea is also an adjunct professor for Millersville University where she teaches graduate level social work classes.



RHONDA HENDRICKSON

Director of Violence Intervention and Prevention Services
YWCA Greater Harrisburg
rhendrickson@ywcahbg.org

Ms. Hendrickson is a graduate from the School of Public Affairs at Penn State and is completing her Masters in Leadership through Elizabethtown College. Ms. Hendrickson is the Director of Violence Intervention and Prevention Services at the YWCA Greater Harrisburg, providing program management in the areas of domestic violence, sexual assault, prevention education, and human trafficking. Prior to her role with the YWCA, Ms. Hendrickson ran the Perry County Victim Witness Program on behalf of the Perry County District Attorney.

Ms. Hendrickson currently co-chairs the victim services committee for the statewide implementation workgroup for Act 105, Pennsylvania's human trafficking legislation. Ms. Hendrickson also manages one of the first federal human trafficking grants in Central Pennsylvania that provides victim services, training, and outreach. The project, PAATH 15, brings together 4 human trafficking task forces, 4 rape crisis centers, and 12 counties from the northern border of Route 15 in Pennsylvania to the southern border of Route 15. Ms. Hendrickson speaks on the national, state, and local levels as an expert in domestic violence, sexual violence, and human trafficking.



BILL JACKSON

President and CEO
United Way of Erie County
bill@unitedwayerie.org

Bill Jackson is President and Chief Professional Officer for United Way of Erie County. He has been with United Way for twenty years, bringing with him fifteen years of previous experience in business, marketing, and finance. Bill is an Erie native, holding bachelor's and master's degrees in business administration from Gannon University.

Bill has been married to Patricia Dahlkemper Jackson for 34 years, and they have three children. Bill and Patty are also proud "parents" of Marco, their four-year-old Golden Doodle.



BILL JONES

President and CEO
United Way of Wyoming Valley
bjones@unitedwaywb.org

Bill Jones is the President and CEO of the United Way of Wyoming Valley, joining the organization four years ago in January 2012. Since that time, the United Way has made transformational and historic changes in the way it serves the community and is now focused on the critical issues of childhood poverty.

Prior to the United Way, Bill was the VP and Chief Operating Officer of Volunteers of America of Pennsylvania where for 12 years he was involved in the growth and development of a number of programs that served the community's most vulnerable residents. He also spent fifteen years in the banking industry as the VP and Community Development Manager for PNC Bank.

The Wyoming Valley has always been home for Bill and he has been associated with a long list of charitable organizations in Northeast PA. He is a graduate of Misericordia University and earned an MBA from Wilkes University in 1989. While most bios are filled with fluff, what is most important in Bill's life is that he is happily married to his wife, Janet, and they are the proud parents of two daughters, Caroline and Rachel.



DAVID LEWIS

President
United Way of the Greater Lehigh Valley
davidl@unitedwayglv.org

David S. Lewis was named President of United Way of the Greater Lehigh Valley (UWGLV) on July 24, 2013. Lewis' responsibilities include leading, managing, and administering all aspects of the organization including: coordinating board of directors' activities; directing and encouraging development efforts; building relationships and communicating effectively with all stakeholders, donors, partner agencies, etc.; championing a community impact perspective; and providing strategic planning and administrative guidance.

Lewis started working in the Lehigh Valley as Vice President, Resource Development in March, 2012. With Lewis at the helm of resource development, the 2012 campaign yielded the most significant increase in the last six years combined. Lewis began his work with United Way in 1988, serving as Campaign Director in Southeastern Pennsylvania; Vice President of Resource Development in Camden County; and Vice President and Chief Operating Officer in Lancaster County.

Lewis holds a B.S. in Social Work from Elizabethtown College and his M.S.W. in Social Work Administration from Rutgers University. He lives with his wife, Anne, of 25 years and has two sons in college and a daughter in high school.



BILL MCKINNEY

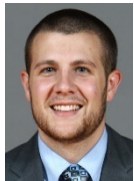
President and CEO
United Way of the Laurel Highlands
michael@unitedwaymonroe.org

Bill McKinney is the current President and CEO of the United Way of the Laurel Highlands (UWLH) serving Cambria and Somerset Counties.

Prior to his 8 year career with the UWLH, Bill and his wife Kim, created 2 real estate holding companies which own and develop residential and commercial property. They have owned and operated these companies for the past 12 years. Bill's work career includes 3 years of Public Accounting and an 18-year Banking career with First Nation Bank of Pennsylvania where he was Regional President and CEO for the Eastern Region.

He graduated from the University of Pittsburgh at Johnstown receiving a Bachelor of Arts degree in Economics, and later in his working career, completed his Masters of Business Administration at Indiana University of Pennsylvania.

Bill and his wife Kim reside in Johnstown. They have three children, Katie, Alison and Patrick.



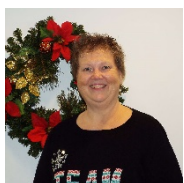
TREY MILLER

Strategic Communications Coordinator
Penn State College of Communications
Twm5101@psu.edu

Trey Miller joined the College of Communications strategic communications team in December 2014. Miller, who previously worked for Penn State Intercollegiate Athletics and Rutgers University, focuses on social media. In this role, Miller is tasked with promoting, informing and engaging the College's audience with a variety of content geared towards stakeholders, current students and prospective students. In addition, Miller writes news and feature stories for the College, among other strategic communications responsibilities.

Prior to joining the College, Miller served as assistant director of athletic communications at Penn State. Before that, he was assistant director of athletic communications at Rutgers. In each of those positions, among other public relations duties, Miller was responsible for handling social media efforts for assigned sports.

Miller graduated from Penn State in 2012 as a Dean's List student. During his time on campus he completed a communications internship with Intercollegiate Athletics and authored a sports story that was voted the best in the nation as part of the annual William Randolph Hearst Foundation's Journalism Awards Program, often referred to as "the Pulitzers of college journalism".



HEIDI NEUHAUS

Director of Volunteer Center
United Way of the Capital Region
hneuhaus@uwcr.org

Heidi Neuhaus has served as Director of the Volunteer Center for United Way of the Capital Region since December 2000. In this capacity, she is responsible for implementing the many activities of the Volunteer Center, including events such as the annual Day of Caring event, the largest single-day volunteer event in our community, Youth Day of Caring and the Federal Day of Service. She provides assistance to corporate partners in conceiving, planning and implementing their signature volunteer events such as Good to Give Back Week and Global Impact Day. She has developed and promoted a menu of on-site volunteer opportunities that can be done over a lunch hour to help companies engage volunteers and support the community.

Heidi provides technical assistance and support to the non-profit community in the field of volunteer management and recruitment. She promotes volunteer recognition through The Volunteer Center's annual Volunteer of the Year event.

Prior to joining the staff at United Way, Heidi worked for several other non-profit agencies, including WITF Public Radio and Television and the American Heart Association.



JANET TORRES

Director of Partnership Development
Kimbria

michael@unitedwaymonroe.org

Janet Torres is the Director of Partnership Development for Kimbria.

Janet has over twenty years working in the government and nonprofit sectors. As a legislative attorney and director of policy for the New York City Council, the New York State Senate and for Governor Andrew Cuomo she led transformative policy initiatives. She took her love for nonprofits and became a fundraiser, lobbyist and government relations specialist for such iconic New York City nonprofits such as the Bronx Zoo, The New York Botanical Garden, and Lincoln Center for the Performing Arts.

She holds a J.D. from Boston University School of Law.

THANK YOU FOR ATTENDING THE 2016 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 #UWP2016CONF

- UWP STAFF

