UNITED WAY VISION

United Way envisions a world where all individuals and families achieve their human potential through education, income stability and healthy lives.

Imagine a world that fosters hope and opportunity for everyone. A world where...

- All children receive a quality education that offers a pathway to a brighter tomorrow.
- The cycle of poverty and financial dependence ends, and productive livelihoods begin for even the most disadvantaged.
- Everyone receives effective health care that improves quality of life.
- Communities not only set significant and measurable goals to advance these fundamental elements of human development, but achieve them.

UNITED WAY MISSION

To improve lives by mobilizing the caring power of communities around the world to advance the common good.

To do this we will:

- Ignite a worldwide social movement, and thereby mobilize millions to action—to give, advocate and volunteer to improve the conditions in which they live.
- Galvanize and connect all sectors of society—individuals, businesses, nonprofit organizations and governments—to create long-term social change that produces healthy, well-educated and financially-stable individuals and families.
- Raise, invest and leverage billions of dollars annually in philanthropic contributions to create and support innovative programs and approaches to generate sustained impact in local communities.
- Hold ourselves accountable to this cause through our steadfast commitment to continually measure—in real terms—improvement in education, income and health.

By focusing on education, financial stability and health—the building blocks of a good quality life—United Ways across our worldwide network are bringing people together to build stronger communities and better lives for all.
DEAR COLLEAGUES,

Welcome to the 2016 Community Leaders Conference. We’re so excited that you’ve come to Vancouver to meet with other United Way leaders, to collaborate on the implementation of our strategy, and to share moving stories of community impact around the globe.

ALL IN TOGETHER: BRINGING STRATEGY TO LIFE, our theme this year, reminds us that each success in your community is a win for every local United Way. For the past several years, we have been working as a worldwide enterprise to create a strategy which aligns our diverse local organizations, leverages our worldwide relationships, and lays the foundation for growth of our impact, all while continuing to serve the 1800+ communities in which we live. During our time together this week, we want to celebrate many local United Way successes and share the tools which delivered these remarkable results.

This week, we challenge you to capture the innovation, insight and energy of these conversations and work together to share both the methods to your accomplishments and the issues which you are addressing; most importantly, we ask for you to carry these messages back to your organization and spur them into action. Throughout the week, you will hear from a diverse group of global leaders, corporate trailblazers, industry experts, and local activists.

Thank you for being part of this experience. We are committed to standing with you as partners in delivering on our mission to advance the common good.
## PROGRAM-AT-A-GLANCE

<table>
<thead>
<tr>
<th></th>
<th>Monday, May 9</th>
<th>Tuesday, May 10</th>
<th>Wednesday, May 11</th>
<th>Thursday, May 12</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Registration and Information Desk</strong></td>
<td>3:00–6:30 p.m.</td>
<td>7:30 a.m.–5:30 p.m.</td>
<td>7:30 a.m.–5:00 p.m.</td>
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<td><strong>Exhibits</strong></td>
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<td>7:30 a.m.–5:30 p.m.</td>
<td>7:30 a.m.–5:00 p.m.</td>
<td>7:30–10:00 a.m.</td>
</tr>
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<td><strong>Connection Cafe</strong></td>
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<td>7:30 a.m.–5:00 p.m.</td>
<td>7:30–10:00 a.m.</td>
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<td><strong>Morning</strong></td>
<td>12:00–5:00 p.m.</td>
<td>7:30 a.m.–5:00 p.m.</td>
<td>7:30 a.m.–5:00 p.m.</td>
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<td><strong>Afternoon</strong></td>
<td>6:30–9:30 p.m. Host City Event at the Vancouver Aquarium</td>
<td>7:30 a.m.–5:00 p.m.</td>
<td>7:30 a.m.–5:00 p.m.</td>
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### Breakfast on Own
8:00–9:00 a.m. ANNUAL MEETING
9:00–9:15 a.m. Break
9:15–10:45 a.m. OPENING GENERAL SESSION
- Brian A. Gallagher, President and CEO, United Way Worldwide
10:45–11:15 a.m. Break
11:15 a.m.–12:30 p.m. LEARNING SESSIONS
12:45–2:15 p.m. LUNCH AND GENERAL SESSION
- Corporate Appreciation
- Growth through Re-Invention Panel with Stacey D. Stewart, U.S. President, United Way Worldwide
2:30–3:45 p.m. LEARNING SESSIONS (CEO/BOARD SUMMIT)
3:45–4:15 p.m. Break
4:15–5:30 p.m. LEARNING SESSIONS (CEO/BOARD SUMMIT)

### Continental Breakfast
8:00–9:30 a.m. GENERAL SESSION
- Keynote Presentation by Felipe Calderon, Former President of Mexico and Climate Activist
- United Way Common Good Awards
9:30–10:00 a.m. Break
10:00–11:15 a.m. KNOWLEDGE EXCHANGE AND NETWORKING
11:15–11:45 a.m. Break
11:45 a.m.–1:30 p.m. LUNCH AND GENERAL SESSION
- Panel Discussion moderated by Shachi Kurl
- Alexis de Tocqueville Award
2:00–3:15 p.m. LEARNING SESSIONS
3:15–3:45 p.m. Break
3:45–5:00 p.m. LEARNING SESSIONS

### Dinner on Own
7:30 a.m.–5:00 p.m. CONTINENTAL BREAKFAST
8:30–11:00 a.m. CLOSING GENERAL SESSION
- Keynote Presentation by Inge Thulin, President and CEO, 3M
- Staying Relevant in an Ever-Changing World with Anat Baron, CEO of StashWall, Futurist and Disruptor
- Remarks by Brian A. Gallagher, President and CEO, United Way Worldwide
12:00–5:00 p.m. ANCILLARY MEETINGS

### Host City Event at the Vancouver Aquarium
6:30–9:30 p.m.
GENERAL INFORMATION

Please wear your conference name badge to all conference–related events. Only participants wearing conference name badges will be admitted to conference–related events. Most activities will occur at the Vancouver Convention Centre.

What to Wear
Business casual attire is encouraged for all sessions. It is recommended that you bring a sweater or jacket to the sessions.

Emergencies
In the event of fire or medical emergency, contact the Conference Office in Room 101. Be prepared to give details as to the nature of the emergency and its exact location.

Attendance
Attendance at the Community Leaders Conference is limited to member United Way participants and their guests, invited speakers, community partners, and staff and guests of United Way Worldwide. Attendees will be issued name badges, which are required for admission to all conference activities.

Special Accommodations
United Way Worldwide is committed to making the conference accessible to all participants. If you have any special needs for accommodations as covered by the Americans With Disabilities Act, please contact the Conference Office in Room 101.

Responsibility
United Way Worldwide is not responsible for any losses of personal property or for any bodily injury (or the result thereof) incurred by participants and anyone accompanying them to the conference (or in connection with any of its activities), unless such loss or injury results directly from the negligence or willful act of an employee of United Way Worldwide acting within the scope of his or her employment.

Translation Services Available

anglais vers le français         한국어 영어
General Sessions will be translated live into French and Korean.

모든 세션은 프랑스어와 한국어로 실시간 번역됩니다
Des sessions générales seront traduits en direct en français et coréen.

Headsets will be available in the General Session room (West Ballrooms A/B/C). While there is no cost to use, a credit card or ID will be required to check out the headset.

WHERE, WHAT, WHEN

On–Site Conference Registration
If you are pre–registered for the conference, you can pick up your conference badge and program guide at the Advance Registration Desk located in the West Level Foyer. If you are not pre-registered, you can register at the On-Site Registration Desk. Conference Registration Desk hours are:

| Monday, May 9 | 3:00 p.m.–6:30 p.m. |
| Tuesday, May 10 | 7:30 a.m.–5:30 p.m. |
| Wednesday, May 11 | 7:30 a.m.–5:00 p.m. |
| Thursday, May 12 | 7:30 a.m.–10:00 a.m. |

Connection Café
Located in West Ballroom D, this area is the place to get connected, learn, share ideas and re–energize. Stop by to connect with your colleagues, pick up informational materials, grab a cup of coffee and check email. The Connection Café hours are:

| Tuesday, May 10 | 7:30 a.m.–5:30 p.m. |
| Wednesday, May 11 | 7:30 a.m.–5:00 p.m. |
| Thursday, May 12 | 7:30 a.m.–10:00 a.m. |

Information Desk
If you need help or have questions about the conference, stop by the Information Desk located in the West Level Foyer. Information Desk hours are:

| Monday, May 9 | 3:00 p.m.–6:30 p.m. |
| Tuesday, May 10 | 7:30 a.m.–5:30 p.m. |
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Wireless Internet
Wifi is available in the common areas and all meeting rooms. To access: Network Name: CLC2016   Password: clc@2016
GET SOCIAL

Make the most of your conference experience through social media and the United Way Event Center app (available for Android and iOS devices).

Download the United Way Event Center Mobile Application
The United Way Event Center app puts the conference and your ability to network with others all in the palm of your hand. Set your own personal learning schedule, connect with attendees and speakers and receive important conference updates throughout the week. Search “United Way Event Center” in your phone’s app store. Because we care about your privacy, you must register with the application to gain access to the networking function.

Whether on Twitter, Facebook or in the conference app, we encourage you to keep the conversation going with colleagues here and around the world.

#Allin4CLC  #LiveUnited

United Way: @UnitedWay
United Way Learning & Conferencing: @UnitedWayLnC
Brian A. Gallagher: @BGallagherUW

Snap Chat Code: United Way

Digital Resource Center
Are your staff, volunteers and partners back home connected with the excitement and learning at the conference? Would you like to expand your learning beyond participating in the conference? Access the free Digital Resource Center at conferences.unitedway.org/drc to view resources from the conference.

You can access the Digital Resource Center anywhere you have internet access or at the Connection Café, where computers are available.

The Digital Resource Center will be accessible after the conference and will contain videos from the conference, background materials and much more. Select videos may only be available for 30 days after the conference.

Going Green
Did you know that the Vancouver Convention Centre has not one, but two levels of GREEN certification? The Centre’s East building is certified BOMA GO GREEN, which is a unique and voluntary Canadian program designed to evaluate a building’s environmental performance and efforts. The Centre’s West building has the LEED® Platinum certification, which is the highest level of certification that can be received from the globally recognized LEED® program (Leadership in Energy and Environmental Design). In fact, the Vancouver Convention Centre is the only convention center worldwide with this achievement.

The Vancouver Convention Centre’s recycling program ranges wide in scope and includes areas such as: Waste Minimization, Food and Beverage Services, Energy Efficiency and Resource Consumption, Air Quality Control, Printing and Paper Use, Sustainable Features, and Wastewater Treatment System. Some of the most interesting efforts the Centre conducts include their 24,000 sq. metre (6 acre) planted roof, with four beehives to pollinate the roof and also supply the kitchen with fresh, natural honey. They also have a marine habitat built in the foundation, and use the seawater to help with heating and cooling. Other note-worthy efforts the Centre makes include their front-of-house and back-of-house intensive recycling initiative, as well as their ‘scratch’ kitchen which features fresh and local products to limit the ‘food miles’ consumed on purchased goods and promote the best of local cuisine. The Vancouver Convention Centre is a truly remarkable building and a great leader in long-term environmental sustainability.
THANK YOU TO THE SPONSORS

United Way is grateful for the support of the organizations that are helping to present this year’s Community Leaders Conference.
EXHIBITS

Visit a select group of vendors whose products and services help United Ways and our partners across the world to maximize resources, expand learning opportunities and continue the work of improving lives in communities. Talk with representatives to explore innovative applications of each product line and explore ways they can be implemented to help your United Way to LIVE UNITED.
DEAR FRIENDS,

What do Guinness, Hollywood and cruise ships have in common? Vancouver, British Columbia, Canada! As hosts of United Way’s first truly international conference, my team and I are delighted to welcome you to our city and to the Community Leaders Conference (CLC).

Vancouver is a multicultural mosaic with 40% of people living here being foreign born. Our city is also on the traditional territory of the Musqueam, Squamish and Tsleil–Waututh First Nations. First Nations culture, both historic and contemporary, is prevalent throughout our city and region.

And, that’s just the beginning! Vancouver is an accessible and safe city surrounded by the North Shore mountains and the Pacific Ocean. Stanley Park, a magnificent West Coast rainforest park, is 10% bigger than Central Park. Monday evening, we look forward to welcoming you at the Vancouver Aquarium for the Host City Event, where you’ll get a taste of Vancouver’s past and present. This year’s conference means you’ll have the opportunity to learn, to share and to work together to build stronger communities for everyone in this city by the sea.

And now, for those fun facts:

- The Lions Gate Bridge—the bridge connecting downtown Vancouver with West Vancouver was originally built by the Guinness family to provide access to a residential development, the British Properties.

- Vancouver is referred to as Hollywood North. It is second to Los Angeles in television production and third behind New York and Los Angeles in film production.

- Vancouver is home to the fourth largest cruise ship port in the world.

Vancouver is also home to United Way of the Lower Mainland. We serve 340,000 people across 26 communities in the Lower Mainland helping vulnerable children, families and seniors. We believe in a healthy, caring inclusive community for all.

Welcome to our city and to British Columbia!

Sincerely,

Michael McKnight
President and CEO
United Way of the Lower Mainland
PROGRAM OF EVENTS

Please wear your conference name badge to all conference-related events. Only participants wearing conference name badges will be admitted to conference-related events.

Monday, May 9

3:00 p.m.–6:30 p.m. Registration and Information Ballroom Lobby

6:30 p.m.–9:30 p.m. Host City Event

Vancouver Aquarium
Buses depart from the Vancouver Convention Centre from 6:15 p.m.-7:15 p.m.

Presented by

United Way of the Lower Mainland is thrilled to welcome you to the first truly international Community Leaders Conference in Vancouver, British Columbia, Canada. Join us and experience the ‘Spirit of British Columbia’ at the Vancouver Aquarium nestled in Stanley Park. Relax and enjoy the sights, sounds and tastes of the Pacific Northwest. Experience a First Nations dance. Get up close to dolphins and sea otters and experience a marine mammal show in this beautiful rain forest setting. Enjoy seafood appetizers, drinks and desserts in the aquarium’s galleries. Buses will depart from the Vancouver Convention Centre beginning at 6:15 p.m. until 7:15 pm. Return buses will begin at 8:30 p.m.

Learning Session Types

**Experts Exchange**
The Experts Exchange features two expert perspectives and approaches on a given topic–corporate and individual engagement, community impact, marketing and communications, resource development or leadership and governance.

**Learning Lab**
These 75-minute sessions are designed to take a deep dive into a specific practice or challenge. Learning Labs will take the form of presentations, panels and workshops, designed to actively engage participants around ideas and community solutions. Participants will receive actionable solutions, insights and tools to be applied in their community.

**Poster Session**
People learn best when they are able to speak directly with the source of knowledge and experience. This collection of posters has been created by presenters to showcase their solutions to an issue facing their community. Test ideas, constructively question assumptions and share your ideas and thoughts. Both the highlighted presenter, as well as the participants, will benefit from this learning and networking gallery walk session.
Tuesday, May 10

7:30 a.m.–5:30 p.m.  Registration and Information  Ballroom Lobby

7:30 a.m.–5:30 p.m.  Exhibits  Ballroom Foyer

7:30 a.m.–5:30 p.m.  Connection Café  West Ballroom D

8:00 a.m.–5:00 p.m.  Career Corner  City Foyer

8:00 a.m.–9:00 a.m.  Annual Meeting  118/119/120

We invite you to participate in the United Way Worldwide’s Annual Membership meeting. The annual meeting includes the election of trustees and the presentation of the Board of Trustees’ report, including financial and membership updates. The annual meeting is open to all conference attendees, however, only official delegates of United Way Worldwide’s members are eligible to vote.

9:00 a.m.–9:15 a.m.  Break

9:15 a.m.–10:45 a.m.  Opening General Session  West Ballroom A/B/C

Brian A. Gallagher, President and CEO of United Way Worldwide, sets the stage for the Community Leaders Conference celebrating successes within our United Way network and discusses who we are as a network and what we aspire to be. We rely on leaders committed not only to our mission, but to the strategies which will deliver impactful results and strengthen United Ways around the globe. The enterprise-wide strategy that drives our organization will be evident throughout our time together in Vancouver and Brian will bring it to life, with tangible examples of success within our United Way network. Join Brian to applaud our shared accomplishments, to learn how collaborative partnerships are central to our future success and to discover how to tell our United Way story in one voice.

10:45 a.m.–11:15 a.m.  Break

11:15 a.m.–12:30 p.m.  Learning Sessions (index of sessions listed on page 34)  114/115

Boomers Away! Strategies to Engage Retirees  114/115
Subject Area(s): Resource Development, Volunteer Engagement, Individual Engagement, Corporate Engagement

Sixty is the new 40! Hear a dynamic panel discuss engaging Baby Boomers and methods to keep them engaged when they retire and can no longer be reached by the workplace campaign. Two approaches you won’t want to miss will be presented: the Retiree Engagement Strategy, which emphasizes partnerships that can help with donor retention and opportunities for retirees to stay connected; and United in Retirement, a product around meaningful retiree engagement designed with the help of retirees in four major markets.

Maureen Curtis, Manager, Labor Programs, United Way Centraide, Windsor-Essex
Mark Lamoth, Senior Vice President, Marketing, United Way of Massachusetts Bay and Merrimack Valley
Sharon Lupton, National Director, Labor Programs and Services, United Way Centraide Canada
John Millikin, Retired Clinical Professor, Arizona State University
Carla Snyder, Director, Corporate Relations, Valley of the Sun United Way
The Siemer Institute for Family Stability (SIFS), an integrated, comprehensive program focusing on preventing family homelessness and reducing students’ school mobility, is currently in 53 U.S. cities. This session is designed to provide attendees an overview of the national SIFS work, as well as local best practices, and to share lessons learned about design and implementation. Participants will have the opportunity for an interactive discussion of proven strategies to obtain the matching funds requirement. Participants will be given access to the SIFS Resource Center to utilize after the conference in order to obtain the necessary tools to design and implement a family stability program in their own city.

Rebecca Carter, Associate Director, Community Impact, United Way of Metropolitan Nashville
Angie McAllister, Associate Vice President and Senior Program Officer, United Way of Central Maryland
Rob Podlogar, National Director, Siemer Institute for Family Stability
Shannon Reed, Income Portfolio Manager, United Way of Greater Milwaukee and Waukesha County

Donor Communication Strategies: Promising Practices from the Network
Subject Area(s): Resource Development, Individual Engagement, Corporate Engagement, Brand/Communications/Marketing

Hear from our network colleagues on how they are successfully integrating innovative year–round donor retention practices with proven successful results. Leave the session with an understanding of complete packaging of useful donor retention tools, templates and tangible strategies.

Keith Barsuhn, Senior Vice President and Chief Development Officer, United Way of Greater Atlanta
Rob McCulloch, Vice President, Fundraising Strategy, United Way Centraide Canada

From Charity to Change: The All–in Approach to Collective Impact Implementation
Subject Area(s): Community Impact, Resource Development, Brand/Communications/Marketing, Operations

United Way of Salt Lake has fully implemented the Collective Impact model for its work. And it’s paying off! Learn the steps it takes to successfully align collective impact work in your organization and make real, sustainable change happen in your community. Participants will explore how integrating collective impact can lead to results–driven community change, recognize the critical role that United Way can play as a ‘backbone’ organization and identify the essential role board and staff leadership play in transforming to a Collective Impact model.

Amy Bosworth, 2–1–1 Director, United Way of Salt Lake
Bill Crim, President and CEO, United Way of Salt Lake
Jerilyn Stowe, Vice President, Marketing and Communications, United Way of Salt Lake
Greg Summerhays, Director, Principal Gifts, United Way of Salt Lake

From Collaboration to Merger: Voices of Experience
Subject Area(s): Governance, Operations

Merging United Ways can be both a challenging and rewarding experience. This session will share how a large and a medium United Way came together to create a much stronger United Way, as well as how a merger of seven United Ways transformed a region. Participants will discern the state of organizational readiness for both United Ways in order to begin the conversation, gain clarity on the strategic benefits of a successful merger and identify characteristics of successful mergers or collaborations.

John Emge, Vice President and Regional Director, United Way of Greater Philadelphia and Southern New Jersey
Michael Herrera, Vice President, Finance and Administration, United Way Toronto and York Region
Sara McCullough, Associate Vice President, Impact, United Way of Greater Philadelphia and Southern New Jersey
Daniele Zanotti, Senior Vice President, Resource Development, United Way Toronto and York Region
Getting Started with Individual Engagement 205/206/207
Subject Area(s): Individual Engagement Learning Lab

Providing world-class experiences to supporters requires us to engage individuals in ways they – and the marketplace – demand. Learn the principles of individual engagement developed by industry experts, with tips to make them real for any United Way. Participants will uncover how to articulate to stakeholders the strategic importance of making individual experience a priority, identify the principles of individual engagement developed by industry experts; and begin optimizing future touchpoints with individuals that ‘wow’ customers in and out of the workplace.

Mike Brooks, Vice President, Innovation, United Way Worldwide
Edwin Goutier, Director, Innovation, United Way Worldwide

Implementing Effective Community Initiatives at Smaller United Ways 217/218/219
Subject Area(s): Community Impact, Individual Engagement, Volunteer Engagement, Resource Development Learning Lab

Smaller United Ways are making big impact! Receive examples of community impact at work in smaller United Ways with limited resources. Hear directly from United Ways that have created dynamic and successful community initiatives by identifying high priority community needs, engaging community partners and implementing strategies linked to their capacity. Participants will recognize the transformational potential of community impact work for a smaller United Way and identify resources and support available to help conduct their own initiative.

Shawn Shanahan, Executive Director, Fremont Area United Way, Inc.
Edward Taylor, Chief Executive Officer, Northern Santa Barbara County United Way
Traci Wickett, President and CEO, United Way of Southern Cameron County
Roger Wood, Director, Network Engagement, United Way Worldwide

Orchestrating Transformation in Vulnerable Communities 121/122
Subject Area(s): Community Impact, Education/Income/Health Experts Exchange

United Way leaders will share lessons on the life-cycle of collective impact efforts, including the process for designing initiatives, when to strategically change course and how to scale what works. Each community will explore why certain efforts succeed, fail or stall, or need course correction. Participants will assess their own strategies to identify possible challenges down the road and, for those just starting, create a road map for success.

Sarah Link, Vice President, Community Impact, United Way of Massachusetts Bay and Merrimack Valley
Kristin McSwain, Executive Director, Boston Opportunity Agenda
Kevin Robbie, Chief Executive Officer, United Way Australia, Ltd.
Joseph Sousa, Vice President, Corporate and Workplace Giving, United Way of Massachusetts Bay and Merrimack Valley

Scaling Up with Organized Labor 118/119/120
Subject Area(s): Community Impact, Resource Development, Volunteer Engagement, Education/Income/Health Learning Lab

United Way’s re-engineered relationship with organized labor offers new possibilities for engaging unions and members in community impact goals and the annual campaign. This session will explore opportunities and challenges in this evolving relationship.

Ana Avendano, Vice President, Labor Participation, United Way Worldwide
So You Want to Be a Community Change Agent?  
Subject Area(s): Education/Income/Health

Impacting change at a community level can be a daunting prospect. It requires new skills, working in different ways, engaging new partners and cultivating deep relationships throughout the community. It is not work that just any organization can do, but it is the work that United Way is uniquely suited for. Hear from network colleagues in Jackson, Mississippi, and Detroit, Michigan, as they share their journey to becoming community change agents, how they turned theory into practical action and the five critical ingredients they found necessary for success: context, choice, concrete, change and collaboration.

Melissa Bowman, Data and Evaluation Manager for Student Success, United Way for Southeastern Michigan  
Jenny Callans, Director, Early Childhood, United Way for Southeastern Michigan  
Anthony Johnson, Executive Director, Alignment Jackson  
Jed Oppenheim, Director, Community Engagement, United Way of the Capital Area, Inc.

Solution Provider Spotlights

During our SOLUTION PROVIDER SPOTLIGHTS, select exhibitors will update you on their newest technologies, upcoming tools and resources available to your organization. Session times and presenting exhibitor vary, so be sure to keep an eye out for your preview of the newest products available to help your team meet their goals.

11:15 a.m.—11:45 a.m. Be Mobile  
Executives and resource development staff should attend to discover how easy it is to review and update your prospect information by harnessing the power and convenience of Andar’s CRM mobile app on your handheld device. Empower your donors and volunteers to give and engage with you online from their smartphone or tablet.

Réal Bédard, President, Helix, Ltd

12:00 p.m.—12:30 p.m. Smarter Grantmaking Starts Here: Getting to Know the GEO Community  
Grantmakers for Effective Organizations is a vibrant community of more than 500 grantmakers focused on smarter grantmaking, stronger (GEO) nonprofits and better results. Learn more about the values and core practices that underlie GEO’s work and how we support the work of our members. Hear about membership benefits, resources and upcoming opportunities to engage with the GEO community.

Stephanie Chan, Program Specialist, Grantmakers for Effective Organizations

12:45 p.m.—2:15 p.m. Lunch and General Session

Models of Success: Reinvention for Growth

We are in an unprecedented period of disruption that’s putting pressure on our business model. Stacey D. Stewart, President of the U.S. Network, will facilitate a conversation on how United Way can adapt to rapid changes in the environment, reinvent itself to drive growth and be the United Way the world needs now more than ever.

Stacey D. Stewart  
U.S. President, United Way Worldwide

UNITED WAY CORPORATE APPRECIATION

United Way works with a diverse and dedicated group of companies as partners in our mission to advance the common good. We are grateful for the partnership of our 84 Global Corporate Leadership companies and the many other influential industry leaders who demonstrate their exemplary corporate citizenship, leveraging their corporate social responsibility to help create strong communities around the world.
The Board and CEO Summit is a key leadership moment at the Community Leaders Conference designed for United Way CEOs and board leaders. The Summit is designed by your peers, CEOs and board leaders, who are members of the High-Performing Boards Initiative and the session will be facilitated by Michael Wilkinson, CEO, Leadership Strategies, Inc. Board leaders and CEOs will be taken on a journey through a series of engaging and interactive discussions, group activities and games to gain a deeper understanding of United Way’s business model and the essential role Board leaders play in driving greater impact, revenue, and results. Hear a panel discussion featuring several United Ways who will share their Board and CEO partnership stories. Board and CEO leaders will have access to the latest resources and will receive information about ways to continue to engage post–Summit. A portfolio of resources is available today to assist United Ways looking to better engage board leaders and enhance overall organizational performance. Visit online.unitedway.org/BoardWalk or contact talent@unitedway.org. (NOTE: this session concludes at 5:30 p.m.)

Brian A. Gallagher, President and CEO, United Way Worldwide
Michael Wilkinson, Managing Director, Leadership Strategies, Inc.
Dr. James Bullard, President and CEO, Federal Reserve Bank of St. Louis; Member, United Way Worldwide Board of Trustees; Chair, USA Board of Trustees; Member, United Way of Greater St. Louis Board of Directors, 2009-2013
The High-Performing Boards Initiative

Advocacy in the Digital Age
Subject Area(s): Individual Engagement, Brand/Communications/Marketing, Education/Income/Health

Modern day advocates demand effortless ways to be a part of a movement larger than themselves and United Way is uniquely positioned to create that experience for them. United Ways can use digital tools and strategies to engage individuals in meaningful ways to make a difference and drive impact in their communities. This session will explore the menu of digital tools and strategies, specifically the use of video, to enhance a world-class individual experience for donors and volunteers. Participants will assess how to use these tools for impact priorities and for donor and volunteer recruitment and retention.

Soncia Coleman, Director, Public Policy and Advocacy, United Way Worldwide
Megan Tracz, Director, Public Policy and Advocacy, United Way Worldwide

Bonding Together: Creating Long-Term Impact with Powerful Workforce Partnerships
Subject Area(s): Education/Income/Health, Community Impact

Learn how United Way of Greater Houston, Greater Houston Partnership, and the Gulf Coast Workforce Board have partnered in multiple ways to meet the demands of regional employers and increase financial stability in a complicated workforce environment. This session will describe how each partnership works and inter-relates so that participants begin to form ideas on implementing a similar approach. Participants will distinguish United Way’s role in these partnerships and determine the impact a shared agenda/cross-sector partnership can have on improving workforce outcomes in these partnerships, including lessons learned.

Anna Babin, President and CEO, United Way of Greater Houston
Peter Beard, Senior Vice President, Regional Workforce Development, Greater Houston Partnership
Mike Temple, Director, Gulf Coast Workforce Board
Building Your Enterprise-Wide Commitment to Community Impact 110
Subject Area(s): Community Impact, Brand/Communications/Marketing, Resource Development, Volunteer Engagement

In the for-profit world, product development is routinely practiced: companies research what products different consumer markets want to buy and how much those consumers would pay for them. Companies then build the products they believe will generate profit and sell them to appropriate markets by describing features and benefits that meet the consumers’ needs and motives. Participants will discover how United Way has adapted this for-profit ‘product development’ process into a nonprofit strategy, as well as explore how to align and transform their pressing community issues into multi-year investment opportunities that drive increased giving, advocacy and volunteering.

Michael Allen, President and CEO, United Way Centraide Ottawa
Carole Gagnon, Vice President, Resource Development, United Way Centraide Ottawa
Alicia Lara, Senior Vice President, Impact, United Way Worldwide

Developing Culturally Competent Leaders: Diversity, Equity and Inclusion 223/224
Subject Area(s): Community Impact, Volunteer Engagement, Operations, Resource Development, Volunteer Engagement

Building, strengthening and supporting communities requires an attention to the dynamics of culture. As inclusive leaders our outreach efforts speak to the engagement of the entire community and further positions us to deliver greater results. In this practical, hands-on session we’ll share leadership skills and competencies necessary to create a culture of inclusion. This opportunity will address how to effectively leverage your role as a leader to drive change and create an environment where authentic and meaningful dialogue can exist around topics such as diversity, inclusion and equity.

Darlene Slaughter, Chief Diversity Officer, United Way Worldwide
Marveen C. Hart, Director, Diversity and Inclusion, United Way Worldwide

Engaging Community and Donors to Support Children and Youth: Learn to Succeed and All In for Youth 109
Subject Area(s): Community Impact, Education/Income/Health

Learn how the United Ways in Calgary, Canada and Romania have successfully engaged key community stakeholders to work collaboratively to improve educational outcomes for children and youth. Rather than create singular approaches or work in isolation to address complex issues, United Way of Romania’s ‘Learn to Succeed’ has empowered the community to take responsibility for increasing the role of education in the community. Similarly, ‘All In for Youth’ in Calgary worked closely with multiple partners to weave together supports for youth to reach a shared community goal of cutting the dropout rate by 50 percent and connect 3,000 youth to positive adults. Learn how these United Ways engaged donors to build support for the work and effectively positioned themselves as leaders of community change.

Kacy Chow, Vice President, Media, Marketing and Communications, United Way Calgary and Area
Cristina Damian, Executive Director and CEO, United Way Romania
Joan Gauthier, Program Manager and School Liaison, All In for Youth, United Way Calgary and Area
Anda Serban, Advocacy and Fundraising Coordinator, United Way Romania
Karen Young, Chief Operating Officer, United Way Calgary and Area

Market Segmentation in Action: Using Generational Insights to Drive Engagement 205/206/207
Subject Area(s): Brand/Communications/Marketing, Individual Engagement, Resource Development, Volunteer Engagement, Community Impact

To drive impact and revenue, we need deeper engagement with donors. In this session, participants will explore how United Ways are using insights grounded in donor attitudes and values to drive individual engagement plans across the lifespan. Participants will realize the power of behaviorally–based values segmentation to increase individual action; apply segmentation across generations, including practical examples from other United Ways; and practice in groups how to use segmentation.

Mark Lamothe, Senior Vice President, Marketing, United Way of Massachusetts Bay and Merrimack Valley
**Partnering for a Purpose**
Subject Area(s): Corporate Engagement, Resource Development, Community Impact

Employee engagement provides concrete ways to leverage relationships and connect employees to community impact. This session will help United Ways design year-round plans and approaches to match engagement products with company goals to drive revenue and growth. Participants will assess workplace engagement using a self-assessment tool; discuss effective practices in partnering with workplaces such that it meets the workplace’s needs and enhances community impact; and be prepared to facilitate individual engagement activities with workplace groups.

Heather Block, Director, Strategic Initiatives, United Way Winnipeg
Jen Gifford, Director, Community Engagement, United Way of Central and Northeastern Connecticut

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**The Designation Project**
Subject Area(s): Resource Development, Community Impact, Individual Engagement, Corporate Engagement

The increasing rate of designations limits United Way’s ability to create impact in the community. United Way of Metropolitan Chicago (UWMC) will provide an approach to stem the rise in designations by illustrating their method and process to concentrate on four corporate partners’ Tocqueville donor engagement. An ‘all in’ approach, the project involved many UWMC departments as well as senior team, cabinet and board members. The goal for the project is for designations to decrease within the four companies and to create strategic direction to be applied across all corporate relationships. So how did they do? Come and discover a different approach to designations and strategies to increase more unrestricted gifts.

Matthew Katzfey, Director, Corporate Partnerships, United Way of Metropolitan Chicago
Michael Smith, Director, Major Gifts and Individual Giving, United Way of Metropolitan Chicago

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**Women’s Giving: An Inclusive Approach to Individual Engagement**
Subject Area(s): Community Impact, Individual Engagement, Resource Development

Without question, United Way’s women’s affinity groups are a powerhouse for engaging donors, growing donor databases, increasing gifts, fueling impact and boosting visibility. Our diverse force of 70,000 women leaders in 160 communities has raised and invested more than $1 billion since 2002, creating lasting change that lifts up entire communities. Join us to hear the success stories of two United Ways’ women’s affinity groups that have a donor-centric approach and a commitment to internal and external collaboration. Participants will discover the state of a female-focused giving initiative and how it influenced the need for change. Hear how United Way Toronto collaborated, not always successfully, with enthusiastic donors to implement a new structure within an existing affinity model; and, hear how to effectively leverage women leaders as advocates and volunteers.

Jennifer Chegus, Associate Director, Individual Giving, United Way Toronto
Kassaundra Escalera, Director, Women’s Engagement, United Way Worldwide
Maja Mikarovska, Manager, Community Investment, United Way Toronto and York Region

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**Solution Provider Spotlights**

**Character Playbook**

In partnership with United Way Worldwide and the NFL, EverFi has built a character playbook, a digital course for middle school students focused on healthy relationships. Local United Ways can choose to sponsor this course in schools throughout their communities.

Zack Price, Director, Marketing, EverFi

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**Learning Sessions**

TUESDAY, MAY 10

West Ballroom D

**3:15 p.m.—3:45 p.m.**

**Character Playbook**

Zack Price, Director, Marketing, EverFi

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**3:45 p.m.—4:15 p.m.**

**Break**
4:15 p.m.–5:30 p.m.  Learning Sessions (index on page 34)

**Black Male Achievement Initiative**

Subject Area(s): Individual Engagement, Community Impact

Hear how one United Way is launching a United Way Black Male Achievement Initiative that supports our community-wide education agenda, while engaging more donors, advocates and volunteers. Participants will develop an understanding of how the national Black Male Achievement/My Brother’s Keeper movements align with United Way impact strategies and observe a case study for bridging national and local work. Come hear how community data and United Way’s impact efforts are linked with these national movements and identify how to frame United Way involvement to reinforce our vision for ALL while building the foundation for committed action for improved outcomes for African American boys and young men.

Shawn Dove, Chief Executive Officer, Campaign for Black Male Achievement
Mary Grissom, Vice President, Engagement Initiatives, Metro United Way, Inc.

**Building Strategic Corporate Relationships: Bold Play 3 in Action**

Subject Area(s): Corporate Engagement

Bold Play 3 allows United Way to identify top worldwide-regional-local corporate partners; define relationships by shared value, social impact and business value; and create opportunities for meaningful employee engagement. Discover how several United Ways are executing Bold Play 3 and playing a major role in corporate citizenship success. These United Ways will share tangible examples of their efforts to deliver beneficial experiences for all parties. Participants will gain greater insight into Bold Play 3, identify and plan volunteer projects that will inspire corporate employees to help meet community needs and discover available resources to help throughout the process.

Jay Geshay, Senior Vice President, Community Impact and Fundraising, United Way of Central Indiana
Lanita McCormick, Vice President, Volunteer Engagement, United Way of Massachusetts Bay and Merrimack Valley
Joseph Sousa, Vice President, Corporate and Workplace Giving, United Way of Massachusetts Bay and Merrimack Valley
Kelly Waldron, Director, Capacity and Performance, United Way Worldwide

**Financial Education in the Community: Highly Effective Programs and Partnerships**

Subject Area(s): Education/Income/Health, Community Impact, Volunteer Engagement, Brand/Communications/Marketing, Resource Development

For six years, United Way Worldwide and the FINRA Foundation funded community-based financial education and coaching efforts. Through evaluations, effective and innovative practices to reach underserved and hard-to-reach audiences were captured and curated and will be shared. Participants will design rigorously audience-centered initiatives that produce knowledge, behavior and financial change; apply strategies to deliver high quality financial education and coaching using partnerships to achieve high-level outcomes; and replicate approaches using multiple, reinforcing strategies to achieve results.

Inger Giuffrida, Consultant, United Way Worldwide
Susan Sarver, Associate Director, FINRA
Laura Scherler, Director, Financial Stability and Success, United Way Worldwide

**From Thousands to Millions: The Strategies that Make it Happen**

Subject Area(s): Resource Development

The importance of individual engagement is at an all-time high. Join us for strategies that work best in growing your donor base and walk away with tactical steps to enhance your fundraising efforts. This session will feature ideas and insight from the Korean Honor Society model and help you get up close and personal with understanding how your United Way fits into Bold Play 4. Hear from local leaders as they share the success and challenges of building a strong major giving program, learn more about transformational gifts and our current work around the $10M Giving Society.

Maureen Grant Hayes, Vice President, Major Donor Relations, United Way Worldwide
Hyo Jin Kim, Executive Director, Community Chest of Korea, Gyeonggi
Edward Montgomery, Honorary Chair, Endowment Campaign, United Way of Greater Philadelphia and Southern New Jersey
Geography Matters: National and Local Cross–Sector Approaches for Community Change

There is an array of creative ways to assess issues and connect organizations to improve lives. This session highlights a national approach developed by Le Rameau in France and a local approach taken by the United Way of Lower Mainland in Vancouver. From these two perspectives, participants will gain valuable insights into what works in terms of diagnosis, resourcing, partner and citizen engagement, execution and evaluation.

Benedicte de Saint Pierre, Vice President, Europe and Middle East, United Way Worldwide
Charles–Benoit Heidsieck, Founder and Chairman, Le RAMEAU
Kim Winchell, Director, Social Impact, United Way of Lower Mainland

Increasing Impact through Student and Retiree Engagement

Students and retirees have nothing in common, right? Think again! This session will explore engagement opportunities from high school students to seasoned volunteers. Hear how Mission Ignition in Southeast Louisiana is inspiring a passion for philanthropy in high school students as well as providing thousands of service hours to the region. At the other end of the age spectrum, contrast how Heart of West Michigan United Way is engaging retirees in meaningful service opportunities, building capacity through cross–generational collaboration and improving large–scale service projects. Whether it’s students, retirees or in–between, this session is sure to give you ideas to spark your individual and volunteer engagement efforts.

Jamene Dahmer, Senior Vice President, Resource Development, Marketing and Volunteerism, United Way of Southeast Louisiana
Melody Reed, Director, Resource Development, Student–Community Partnership, United Way of Southeast Louisiana

Maximizing Global Corporate Leaders Corporate Relationships

Do you want to increase your donor base, raise more revenue and deepen loyalty with United Way’s top corporate donors? This session will provide strategies, tactics and examples from companies and communities that have generated growth within our Global Corporate Leaders (GCL) portfolio. We will spotlight feedback from companies through many ‘voice of the customer’ engagements about the direction and interests of our companies and their employees. A range of topics will be covered, including the United Way campaign, executive engagement, partnership agreements, volunteerism and affinity groups.

Matthew DeCamara, Vice President, Corporate Relations, United Way Worldwide

Three Ways to Get Donors Excited About United Way

What communication strategies work best to engage donors more deeply in United Way’s work? Get insights and ideas from United Way leaders, brainstorm with peers and come away with practical steps to tell your story more effectively. Participants will be able to realize and shift to ‘the new way’ of telling the United Way story; articulate messaging, value propositions and positioning that builds affinity and differentiates United Way from other charities; and communicate effectively the results of their work to engage others.

Chris Herndon, Senior Vice President, Community Engagement, United Way of Central Indiana
Liz Marshall, Director, Strategic Marketing, United Way Toronto
Neil Parekh, Director, Network Communications, United Way Worldwide
Using Evidence to Inspire Action and Invest in What Works

Subject Area(s): Community Impact, Education/Income/Health

Learn how United Ways and their community partners are using community, population and individual level data to increase awareness of issues and to demonstrate success in addressing ongoing challenges. Equally as important, consider how United Way’s knowledge of community data and focus on results enhances our value proposition, strengthens credibility with potential and existing donors, and can be a selling point for marketing your impact work and raising revenue.

Heather Block, Director, Strategic Initiatives, United Way Winnipeg
Julia Estrada, Community Impact Director, Education and Youth, Valley of the Sun United Way
Ayeola Fortune, Director, Youth Success in Education, United Way Worldwide
Connie Walker, President and CEO, United Way Winnipeg

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**Solution Provider Spotlights**

<table>
<thead>
<tr>
<th>Time</th>
<th>Topic</th>
<th>Speaker</th>
</tr>
</thead>
<tbody>
<tr>
<td>4:15 p.m. – 4:45 p.m.</td>
<td>Outreach Meal Packaging and Volunteer Engagement</td>
<td>Bryan Coffey, Event Coordinator, Outreach</td>
</tr>
<tr>
<td>5:00 p.m. – 5:30 p.m.</td>
<td>Cityspan Collaborative: Building Data Management Systems to Assess Collective Impact</td>
<td>Kara Johnson, Director, Business Development, Cityspan</td>
</tr>
</tbody>
</table>
Wednesday, May 11

7:30 a.m.–5:00 p.m.  Registration and Information  Ballroom Lobby
7:30 a.m.–5:00 p.m.  Exhibits  Ballroom Foyer
7:30 a.m.–5:00 p.m.  Connection Café  West Ballroom D
8:00 a.m.–5:00 p.m.  Career Corner  City Foyer
8:00 a.m.–9:30 a.m.  General Session  West Ballroom A/B/C

Keynote Presentation

Felipe Calderón is the 56th President of Mexico. Establishing economic reform as a top priority of his administration, Calderón implemented policies that catapulted Mexico into a powerful player in the global economy. Since leaving his post as President, he has focused his attention on the economic benefits of acting on climate change. Mr. Calderón has been named “Statesman of the Year” by the World Economic Forum, and “Champion of the Earth” by the United Nations, among other acknowledgments. TIME magazine has designated him as one of their top 100 influential people in the world.

Felipe Calderón
Former President of Mexico and Climate Activist

UNITED WAY COMMON GOOD AWARDS

To highlight outstanding community impact work and reinforce the Enterprise-Wide Strategy, this general session includes the presentation of the United Way Common Good Awards for improving lives in communities around the world. This year, three communities will showcase the strength of the impact continuum-bringing about positive outcomes in a program solution, an impact initiative and a community solution. These awardees have demonstrated how they have come together to establish a shared vision for change and have worked collectively to demonstrate results in education, income and health. Join us in celebrating their success!

9:30 a.m.–10:00 a.m.  Break
10:00 a.m.–11:15 a.m.  Knowledge Exchange and Networking: Work Better Together ‘As One’ Network

To move forward and advance the common good, it’s critical that we work together as one network. Can we embrace the localness that is our core strength while recognizing that our fates are tied? Delivering maximum social impact and meeting donors’ needs requires us to join hands in a tighter way than ever before. Engage your United Way colleagues in an important conversation. In this networking session, you will share your experiences and best practices, ask questions, challenge assumptions and learn from each other about how we can work together. We are one network. The world needs United Way now more than ever. Are you in?

Small Cities (BPM #1 and #2)  219, 220, 223
Medium Cities (BPM #3)  109, 110, 114, 118, 121
Large Cities (BPM #4)  202, 205, 211

11:15 a.m.–11:45 a.m.  Break
Community Leaders Conference

Lunch and General Session

Presented by

West Ballroom A/B/C

11:45 a.m.–1:30 p.m.

ALEXIS DE TOCQUEVILLE AWARD

An integral part of United Way’s individual engagement efforts, The Tocqueville Society recognizes local philanthropic leaders and volunteer champions around the world who have devoted time, talent, and funds to create long-lasting changes by tackling our communities’ most serious issues. Since 1973, we have honored an outstanding Society member each year with the United Way Alexis de Tocqueville Award, recognizing their exceptional and sustained volunteer and philanthropic leadership. Both the Tocqueville Society and this prestigious award Alexis de Tocqueville, a French scholar who visited North America and documented in his treatise, Democracy in America, 1835 and 1840, the spirit of voluntary association and effort for the common good that he observed there.

2:00 p.m.–3:15 p.m.

Learning Sessions (index on page 34)

From Corrective Action to Competitive Advantage: How Diversity is Reshaping Our World

From the day he was five-years old and dropped off at the foster home where he would spend the next eleven years, Steve Pemberton was mentally and physically tortured. No one in the system could help him or tell him if he had a family. But a faint light appeared from a neighbor’s small act of kindness—a box of books. From one of those books, he began to build a way out, excelling at school, earning a full scholarship to Boston College and charting a road to tremendous success. This session will discuss his incredible story and how none of it would have been possible without help from people along the way who poured a love of education into him. His message will expand upon how the lens of diversity and inclusion played a critical role in his growth and continues to inspire his work today.

Presented by

FEATURED SESSION

Reframing Our Value Proposition: A Conversation on Donor Cultivation

While the world may seem smaller and more closely connected than ever, the need for active participants in meaningful philanthropy continues to grow exponentially. As more and more charitable organizations develop, nonprofits must reframe their value proposition and collaborate with partners and with donors in new ways. Learn how donors rally around measurable impact, how they want to be engaged, and what happens when they are. This panel conversation highlights the philanthropic impact from Tocqueville to transformational giving.

Moderated by Shachi Kurl, Executive Director, Angus Reid Institute
Anna Babin, President and CEO, United Way of Greater Houston
Brad Busse, President, Busse Ventures and Member, United Way Worldwide Leadership Council
Petra Nemcova, Philanthropist and Founder, Happy Hearts Fund

Digital Engagement for Social Good

Subject Area(s): Individual Engagement, Brand/Communications/Marketing, Corporate Engagement

Do you want to be a leader in digital engagement but aren’t sure where to start? Discover the five steps one United Way took to bring Bold Play 2 to life with impressive results. Then uncover how our network is working together in new ways to create digital engagement solutions at scale. Participants will realize the levers that appeal to our next generation of donors – millennials – and infer and articulate the impact of multi-market collaboration to solve complex technology and individual engagement challenges.

Dana Brown, Vice President and Executive Director, Digital Services, United Way Worldwide
Kacy Chow, Vice President, Media, Marketing and Communications, United Way Calgary and Area
Karen Young, Chief Operating Officer, United Way Calgary and Area
Engaging Women Leaders in Policy-Driven Change

Advocating for education, financial stability and health is critical for making sustainable community change. Learn how to incorporate advocacy into your individual engagement strategy to deepen personal and relevant connections with women donors. Participants will explore best practices to build relevant connections with current/prospective individuals and identify how to approach, and engage women supporters in advocacy opportunities based on interests, lifestyle and relationship to the organization.

Michelle Branch, United Way National Women’s Leadership Council Member and Attorney, Branch Law Group
Paula Green Johnson, Director, Engagement, United Way Worldwide
Lindsay Torrico, Director, Education, Income and Health Policy, United Way Worldwide

Next Level of Corporate Volunteering: Strategic Engagement and Major Gift Boards

United Way of Greater Atlanta and United Way for Southeastern Michigan will present a dynamic panel on how to leverage the talent and resources of influential volunteers and volunteer groups to increase their giving. United Way for Southeastern Michigan will demonstrate strategic methods in which to engage corporate accounts and donors at all levels, while United Way of Greater Atlanta will share specific tactics for leveraging leadership donor cause interest into dynamic retention and growth results.

Katina Asbell, Associate Broker, Real Living Capital City
Alex Bombeck, President, North Highland Worldwide Consulting
Kristen Lewis, Manager, Volunteer Engagement, United Way for Southeastern Michigan
Ann Mitchell, Associate Vice President, Exclusive Channel Sales, Nationwide Insurance
Bryan Vinson, Major Gift Officer and Director, African–American Partnership, United Way of Greater Atlanta

Optimizing the Donor Experience through Journey Mapping

Hear how Mile High United Way is working to optimize the donor experience by mapping the journey their donors take from first gift to renewal and beyond. With limited resources, learn how Mile High focused resources on the points of the journey that mattered most and, as a result, identified donor ‘pain points’ and ‘wow’ moments, all with the goal of increasing individual donor retention and engagement. Participants will hear existing donor journey research to begin thinking through the donor journey and the critical points to address along the way. Finally, participants will discover how to make improving the donor experience a goal across their United Way and part of their culture.

Liz Gardner, Senior Director, Corporate and Employee Engagement, Mile High United Way, Inc.

Serving Those Who Have Served: United Ways Serving Veterans

Explore how United Ways engage with their local communities to respond to our returning military members’ needs. From programs to donor engagement, United Ways are using a collective impact model focused on ensuring positive outcomes for our service men and women. Participants will discover how to leverage core assets to serve veterans in their community, connect donors and corporate partners to their veterans work, and see how the Mission United product has engaged and refined one United Ways’ programmatic, marketing and resource development departments and practices.

Howard Bakalar, Chief Program Officer, United Way of Broward County
Kathleen Cannon, President and CEO, United Way of Broward County
David Jobe, Director, Information and Referral Services, United Way of Greater Houston
Curtis McMinn, Senior Program Manager, Community Investment, United Way of Greater Houston
Larry Olness, Senior Vice President, Community Services and Chief Strategy Officer, Heart of Florida United Way
United Ways across the network are busy defining what social innovation means in their communities. In 2013, United Way of Metropolitan Dallas (UWMD) launched their social innovation fund and impact accelerator program called GroundFloor. Since then, they have invested over $1M, which their investees have been able to more than quadruple. The addition of GroundFloor to UWMD’s community impact portfolio has allowed them to build a pipeline of competitive nonprofits, serve a wider range of impact organizations and attract donors who are looking for a new brand of philanthropy. Join us to discover a framework for evaluating social innovation opportunities in the United Way community impact context, and forecast the challenges and necessary factors for starting an impact accelerator program.

Kate Knight, Director, GroundFloor, United Way of Metropolitan Dallas, Inc.
Keith Thode, CEO and Chief Scientist, AdvanceNet Labs
Bob Wright, Attorney, Wright Connatser PLLC

Part of engaging the largest developing consumer group and supporting individual engagement efforts outlined in Bold Play 2 is uncovering deeper insights into the minds and hearts of millennials. This session will introduce results from United Way Worldwide’s 2015 millennial panel study and examine case studies to illustrate millennial engagement insights and potential within the workplace. Participants will hear how United Ways and their corporate partners mutually build and activate workplace marketing, communication and engagement to build deeper and more relevant connections with millennials. Participants will gain increased knowledge about what motivates millennials to engage in philanthropy and with United Way.

Edwin Goutier, Director, Innovation, United Way Worldwide
Julia Raether, Director, Market Research, United Way Worldwide
Kristin Thomsen, Manager, Market Research, United Way Worldwide

United Way Worldwide and United Way leaders around the world are working together to speak with one brand and one voice. United Way’s new global brand strategy will help United Ways to clarify messaging, unify broad understanding, guide business behaviors and streamline decision-making. This is a brand training session to help United Way leaders (volunteers, executives, staff) understand and activate our brand strategy in their communities.

Lisa Bowman, Executive Vice President and Chief Marketing Officer, United Way Worldwide
Edward Farley, Vice President, Marketing and Brand Strategy, United Way Worldwide
United Way’s Role in Crisis Response
Subject Area(s): Community Impact

This session will discuss potential roles for United Ways and recommended steps to take both prior to and following a disaster or crisis event. Hear from United Ways that have experienced natural and humanitarian disasters in their communities and how they mobilized the community in effective response and recovery. Participants will identify potential roles for United Ways when a disaster/crisis strikes, recognize the value that United Way brings in addressing long-term recovery efforts, and pinpoint resources and support available to United Ways.

**Erin Budde**, Vice President, Strategic Giving and Innovation, United Way of Greater St. Louis, Inc.
**Kymn Davidson-Hamley**, Executive Director, United Way of Montgomery, Radford & Floyd
**Kathy Gardner**, Senior Vice President, Community Investment, United Way of Greater St. Louis, Inc.
**Regina Greer**, Vice President, Community Response, United Way of Greater St. Louis, Inc.
**Ayanna Lewis**, Manager, Network Engagement, United Way Worldwide
**Julie Russell**, Senior Vice President, Planning and Evaluation, United Way of Greater St. Louis, Inc.
**Michael Williamson**, President and CEO, United Way of Southeast Louisiana

Well Designed Dashboards Can Lead to Better Informed and Higher Performing Boards
Subject Area(s): Governance, Operations, Volunteer Engagement, Individual Engagement

Succinctly presenting key operational information in a well-designed, easily interpreted dashboard will improve your board’s understanding of your operation, increase their awareness of your challenges and lead to better board performance. Learn how Aloha United Way’s Dashboard brought clarity and focus to board reporting and supported volunteer leaders in their decision making and strategic discussions. Participants will also hear about a technology solution implemented at United Way of Metropolitan Dallas.

**Norm Baker**, Chief Operating Officer, Aloha United Way
**Wanda Mizutowicz**, Chief Financial Officer, United Way of Metropolitan Dallas, Inc.

POSTER SESSIONS

Beyond Program Funding: Increasing Relevancy by Becoming a Thought Partner
Subject Area(s): Community Impact, Education/Income/Health

Metro Nashville public schools has 83,000 students, 73 percent of whom live at some level of poverty. United Way of Metropolitan Nashville (UWMN) leverages public, private and non-profit partnerships to drive student success and family stability. By increasing the depth of partnership, UWMN has moved beyond being a ‘funder of programs’, to include the role of thought partner to improve lives. By getting on the district’s agenda, instead of bringing its own, as well as building relationship with district leadership, UWMN is positioned to offer a more holistic partnership that supports the district in achieving their desired outcomes.

**Erica Mitchell**, Senior Director, Community Impact, United Way of Metropolitan Nashville

Biggest Challenges Facing Our Organizations
Subject Area(s): Community Impact, Individual Engagement, Governance, Operations, Resource Development

Your challenges and triumphs are likely connected to trends evident across the nonprofit community. Hear what 2,000 nonprofit and foundation leaders think are the biggest issues facing our organizations and how to solve them.

**Troy Adkins**, Director, Networks and Member Engagement, Independent Sector
Community Health and Community Schools: A Collective Impact Approach  
Subject Area(s): Community Impact, Education/Income/Health, Corporate Engagement

See how one United Way partnered with local public health leaders, nonprofits, foundations, corporations and donors, creating a collective impact model to holistically address community health and safety within struggling elementary schools.

**Meredith Stidham, Assistant Vice President, Community Impact, Granite United Way**

Flexing Your Collaborative Muscles for Greater Impact  
Subject Area(s): Community Impact, Governance, Operations, Resource Development

Hear how United Way peers are creating effective internal culture, practices and priorities in order to become better collaborators and learn what changes United Ways can make to become ‘collaboration–ready.’ Walk away with concrete tools and ideas to foster an internal culture that primes organizations for external collaboration.

**Stephanie Chan, Program Specialist, Grantmakers for Effective Organizations**

Good Shop: Community Outreach Model for Giving  
Subject Area(s): Resource Development

The Good Shop is a cost effective giving program for small business owners which grew by 3,000 new participants in 2015 alone, and currently engages more than 7,000 volunteers. The Community Chest of Korea will demonstrate how it has engaged 13,360 Good Shops which are now growing awareness, engagement and resources on a national level.

**Seong Yul Kim, Team Leader, Resource Development, Community Chest of Korea – Jeju**

Strengthening Your Out-of-School Time Efforts: Leveraging the Toolkit  
Subject Area(s): Education/Income/Health, Community Impact

Looking for ways to strengthen your United Way’s work in out-of-school time (OST)? This session will orient you to United Way Worldwide’s OST Toolkit and online learning modules developed specifically for United Ways.

**Rachel Fishman, VISTA Volunteer, United Way Worldwide**

Systemic Approach to a Corporate Social Responsibility Program Aimed at Community Life Improvement  
Subject Area(s): Corporate Engagement, Resource Development, Community Impact, Governance, Volunteer Engagement

This session will explore United Way of Russia’s partnership with JTI, a relationship that has evolved into a full CSR portfolio that addresses deep interests of JTI, engages JTI employees, raises resources and addresses community needs. Discover how a Volunteer Day has grown to span a portfolio of opportunities that strengthen the JTI and United Way relationship, as well as the difficulties overcome and critical success factors.

**Alexander Arkhipov, Director, Community Investment and Internal Communications, JTI Russia**  
**Tatiana Zadirako, Executive Director, United Way of Russia**

The Role of Public Policy and Advocacy in the Five Bold Plays  
Subject Area(s): Brand/Communications/Marketing, Community Impact, Individual Engagement, Resource Development

Public policy and advocacy are essential elements to our business model. From attracting and engaging new supporters to deepening relationships with government, this poster session will illustrate the role of advocacy in advancing our work.

**Patrick McIntyre, Director, Health Policy, United Way Worldwide**
United Way Mexico Toy Library Network
Subject Area(s): Education/Income/Health, Community Impact, Volunteer Engagement, Corporate Engagement, Resource Development

Explore how to help children develop social and emotional skills, as well as motor abilities, through a unique investment opportunity, Toy Libraries. The United Nation’s Universal Declaration of Human Rights describes play and recreation activities as key influencers in fulfilling a child’s right to the highest attainable standard of health. Hear how Fondo Unido Mexico’s Toy Libraries are raising resources and engaging volunteers working to improve the lives of children.

Jennifer Morfin, Director, Community Impact and Strategic Alliances, Fondo Unido, I.A.P.

United Way: Your Social Investment Advisor
Subject Area(s): Resource Development, Community Impact

A small/medium sized United Way describes a different slant on product development and major gifts that aligns with its mission, mandate and competitive advantage. As a result, this United Way serves as a trusted social investment advisor by framing their expertise and leveraging existing relationships.

Wendy MacDermott, Executive Director, United Way Saint John, Kings and Charlot

Youth for Healthy Mumbai: Public–Private Partnership to Address Health Issues
Subject Area(s): Community Impact, Volunteer Engagement, Education/Income/Health, Corporate Engagement

How can you strengthen public–private partnerships, save lives through community participation and youth engagement, build brand awareness and further the stewardship of your corporate partner? Youth for Healthy Mumbai is a unique public–private partnership campaign that does just that. Discover how United Way Mumbai and the Public Health Department have joined forces to engage corporate volunteers and students as change makers in a campaign to prevent and control spread of monsoon ailments in Mumbai.

Jayanti Shukla, Executive Director, United Way Mumbai

Solution Provider Spotlights

<table>
<thead>
<tr>
<th>Time</th>
<th>Event Description</th>
<th>Speakers</th>
</tr>
</thead>
<tbody>
<tr>
<td>2:00 p.m.—2:30 p.m.</td>
<td>Preview of the Brand New Donation Tracker</td>
<td>Don Bayne, President, Cascade Data Solutions</td>
</tr>
</tbody>
</table>
| 2:45 p.m.—3:15 p.m. | Got Impact? e-ClImpact, That Is                                                   | Patti Brooks, President and Founder, Seabrooks  
Stacey Gillette, Director, Business Development and Innovation, Seabrooks |
Social Media from the Inside Out: Staff and Board Members as Online Ambassadors for Your United Way

Social media can help drive conversations about important local issues and shape community perceptions. As thought leaders in local communities, it is important that United Way executives and their staff and boards have a strategy on social media platforms for their personal brands to increase the impact of their United Way. There are also significant benefits for the organization’s brand and fundraising, including expanding reach, increased engagement, especially with younger donors and deepening trust. Staff, board and seniors leaders are the best people to serve as ambassadors because they know the organization and important issues from the inside out. In this highly interactive session, master trainer, author and networking expert, Beth Kanter, will help participants understand how to leverage an individual leadership profile in service of organization’s brand and some strategies for getting started. The workshop content is based on Ms. Kanter’s two books: ‘The Networked Nonprofit’ and ‘Measuring the Networked Nonprofit,’ and her extensive experience training nonprofit and foundation leaders to use these skills in service of their communication strategy around the world.

Consumer Insights to Drive Individual Engagement and Transformation to Women United

Subject Area(s): Individual Engagement, Brand/Communications/Marketing, Resource Development

This session will unveil unprecedented consumer insights (motivations, perceptions and sentiment) that directly inform individual engagement strategies targeting women leaders. The panel will articulate how these insights were used to develop the business case that led to the transformation from Women’s Leadership Council to Women United. Participants will walk away with actionable insights and a solid research-based foundation to launch/expand their local women’s engagement efforts.

Karen Brunn, Vice President, Research, United Way Worldwide
Ellen King, Retired Attorney and Community Leader, United Way Massachusetts Bay and National Women’s Leadership Council
Julia Raether, Director, Market Research, United Way Worldwide
Suzanne Takeuchi, Vice President, Strategic Segments, United Way Worldwide

C–Suite Insight and Advice on Volunteer Engagement as a Winning Business Strategy

Subject Area(s): Resource Development, Volunteer Engagement

Across the world, trends, attitudes and expectations in employee engagement and board leadership are changing at a rapid pace. Join United Way executives who will offer best practices and guidance; suggest resources that build relationships as well as drive education, income and health outcomes; and generate revenue through strategic volunteer engagement.

Keith Barsuhn, Senior Vice President and Chief Development Officer, United Way of Greater Atlanta
Michelle Braun, President and CEO, United Way of Northeast Florida, Inc.
Mei Cobb, Director, Volunteer and Employee Engagement, United Way Worldwide
Maureen Grant Hayes, Vice President, Major Donor Relations, United Way Worldwide
Bill Hulterstrom, President and CEO, United Way of Central and Southern Utah

Documenting and Sharing Our Story of Impact: The United Way Results Framework

Subject Area(s): Community Impact, Education/Income/Health, Resource Development, Brand/Communications/Marketing, Corporate Engagement

Demonstrating our impact to global partners and donors requires a common approach to measuring results. The United Way Global Results Framework is designed to help the United Way network tell a story of impact that conveys our ability to mobilize resources to address society’s biggest challenges; to activate people, organizations and institutions to bring about change; and
to deliver results for individuals, families and communities. Participants will review the United Way Global Results Framework, a core element of Bold Play 1, while determining how the indicators can be used for donor engagement, resource development and telling the story of impact.

Kimberlee Guenther, Director, Outcomes and Measurement, United Way of Metropolitan Chicago
Alicia Lara, Senior Vice President, Impact, United Way Worldwide
Farron Levy, Founder and President, True Impact
Worlanyo Ocloo, Executive Director and CEO, United Way Ghana
Katie Pritchett, Vice President, Community Impact, Capital Area United Way, Inc.

How to Live United: Engaging Individuals and Community in Early Literacy Impact
Subject Area(s): Community Impact

From engaging deeply with neighborhood residents, to collaborating with donors, to activating volunteers and partners, Spokane County United Way and Metro United Way, Inc. Louisville, will share what they have learned about cultivating relationships that accelerate impact. Participants will hear examples of collective impact that engage business partners in supporting improved literacy efforts and examine how to implement community-wide projects through a continuous improvement methodology. Attendees will explore two examples of collective impact that engage business partners in supporting improved literacy efforts; hear first-hand, the lessons learned when implementing community-wide projects through a continuous improvement methodology and finally, obtain tools and resources about community engagement tied to collective impact efforts.

Michaela Brown, Manager, Collective Impact, Spokane County United Way
Mary Grissom, Vice President of Engagement Initiatives, Metro United Way, Inc.
Amy McGreevy, Executive Director, Excelerate Success, Spokane County United Way
Blake Pang, Vice President, Resource Development, Spokane County United Way

Moving from Enterprise-Wide Strategy to Local Action at Small to Mid-Sized United Ways
Subject Area(s): Individual Engagement, Community Impact, Corporate Engagement, Resource Development

United Way’s Enterprise-Wide Strategy has great importance for smaller United Ways seeking to grow and expand their relevance. Smaller United Ways, however, often find it difficult to understand how the strategy can be of value to them. A team of United Way Worldwide staff and executive directors from smaller United Ways researched their operational challenges and identified resources critical to move forward. The panel will discuss challenges faced at their United Ways and how to use these resources to move from strategy to action. Attendees will have the opportunity to identify specific steps they can take to help advance their United Ways.

Sam Azar, Director, Strategy, United Way Worldwide
Paul Heimer, Executive Director, United Way of Albany County
Ayanna Lewis, Manager, Network Engagement, United Way Worldwide
Amy Meek, Chief Executive Officer, United Way of Citrus County
Christina Oey, Executive Director, Capital Area United Way, Inc.

Opportunities for Youth: Addressing Youth Unemployment Worldwide
Subject Area(s): Education/Income/Health, Community Impact, Corporate Engagement

A growing body of research, and a growing chorus of thought leaders, are calling attention to the global issue of youth employment. This panel discussion will spotlight the multi–sector collective impact efforts to address this critical issue. Participants will walk away with an understanding of the roles they can play in shaping and advancing youth development in their communities and will hear about best practices for working with employers, unions, schools and other partners to address youth unemployment.

Janet Austin, Chief Executive Officer, YWCA Metro Vancouver
Eric McDonnell, Chief Operating Officer, United Way of the Bay Area
Onwell Msomi, Executive Director, United Way South Africa
Steve Pemberton, Chief Diversity Officer, Walgreens
Lindsay Torrico, Director, Education, Income and Health Policy, United Way Worldwide
Understanding and Engaging Your Millennial Audience
Subject Area(s): Individual Engagement, Resource Development, Volunteer Engagement
Learning Lab

To remain relevant, United Way must engage with millennials. United Way LINC (Lead. Impact. Network. Change.) is an innovative engagement model created to connect with millennials. LINC is a national strategy in 16 markets that engage young professionals under 30, with social–volunteer projects highlighting community impact efforts, while offering an environment to socialize with fellow volunteers and gain a deeper understanding of United Way's work. Explore strategies to acquire and engage millennial constituents by offering opportunities that speak to their unique values, attributes and expectations. Participants will be able to create a clear framework with easy to deploy strategies to start engaging millennials today and learn the process to become a United Way LINC market.

Stephanie Cooper, Manager, Donor Relations and LINC, United Way of Greater Kansas City
Emily Fay, Associate Manager, Development, United Way of Greater Cincinnati
Gina Santagati, Director, Major Gifts and Strategic Markets, United Way of Greater Milwaukee and Waukesha County
Rachel Strehlow, Account Manager, Strategic Markets, United Way of Greater Milwaukee and Waukesha County
Stephanie Tate Pilger, Director, LINC and Young Professional Leaders, United Way of Greater Atlanta

Understanding the Competitive Landscape in Corporate Social Responsibility
Subject Area(s): Resource Development, Corporate Engagement, Volunteer Engagement
Learning Lab

Technology companies are finding a niche in the nonprofit marketplace. Mile High United Way conducted a competitive analysis of the top campaign processors around the country – Your Cause, Benevity, and America's Charities – to better understand their sales proposition. United Way's ability to support year-round engagement activities and our deep knowledge of complex community needs remains our fiercest advantage. In this session, hear what has been done to position our Corporate Relations team as Corporate Social Responsibility experts. Participants will have the tools to identify and sell United Way’s unique selling position and develop a strategy for year-round engagement to better steward individuals.

Cacey McReavy, Manager, Corporate Relations, Mile High United Way, Inc.

Welcoming Newcomers: How United Ways are Fostering Inclusive Communities
Subject Area(s): Community Impact, Brand/Communications/Marketing, Resource Development
Experts Exchange

This interactive session will showcase how United Ways in both North America and Europe are responding to the arrival of newcomers, including refugees and immigrants, in their communities. In addition to learning about newcomer issues around the world, attendees will gain practical insights into the formation and management of cross-sector partnerships as well as critical success factors to the integration of newcomers.

Jose Ferrao, Executive Vice President, International Network, United Way Worldwide
Helene Grossman, Director, Community Impact Services, United Way of Central Iowa
Diane Hassan, President and CEO, United Way Tocqueville France
Shelley White, President and CEO, United Way Peel Region
Achieving and Maintaining Financial Prosperity at SparkPoint Centers
Subject Area(s): Community Impact, Education/Income/Health

United Way of the Bay Area’s SparkPoint Centers have demonstrated that working with families to earn enough income, build a good credit score, accumulate savings and maintain healthy debt can assure that they withstand financial struggles and do not fall back into poverty.

Sandy Allen, Program Associate, United Way of the Bay Area

Attendance Matters
Subject Area(s): Community Impact, Brand/Communications/Marketing, Corporate Engagement, Individual Engagement, Resource Development

Studies show that regular school attendance can influence a student’s success in both school and life. The Attendance Matters initiative uses community-wide support to encourage all students to attend school every day by raising awareness.

Bruce Hawkins, Superintendent, Educational Service District 123
Beverly Weber, President and CEO, United Way of Benton and Franklin Counties

Elevating United Way’s Healthcare Expansion Efforts by Connecting People and Partners
Subject Area(s): Community Impact, Education/Income/Health, Operations, Resource Development, Brand/Communications/Marketing

The Affordable Care Act opens an opportunity for United Ways to engage in the health space differently. The relationships built from this work have led us to diversify funding streams for ourselves and partners and is forcing us to work, think and organize in new ways. Discover how this cross-functional opportunity drove alignment, integration and relationship building needed for regional leadership on large scale impact projects.

Bill Green, Manager, Public Policy, United Way of Metropolitan Chicago
Alexandrea Murphy, Senior Manager, Community Investment, Health, United Way of Metropolitan Chicago

Endowments Today and Tomorrow: How Important is Sustainable Funding to United Way?
Subject Area(s): Resource Development, Volunteer Engagement, Brand/Communications/Marketing

Developing a sustainable funding base is both a key goal and a challenge. Uncover how endowments are being leveraged across the network; how assets and income are being generated from them; what is being done to grow endowments; and how United Ways can diversify their revenue stream through an endowment initiative for more robust and sustainable funding to support their mission.

Jennifer Gipp, Director, Major Donor Relations, United Way Worldwide
Evelyn Morgner, Manager, Endowment and Planned Giving Services, United Way Worldwide

Get on Board: Providing Added Value for Leadership Contributors
Subject Area(s): Governance, Volunteer Engagement

This session will explore United Way of Greater St. Louis’ Get On Board program that advances quality standards in governance, program, administration and finance to bolster the quality of nonprofit partners; builds strategic partnerships with corporations and foundations engaged in the Get On Board program; and connects United Way leadership contributors to participating nonprofits seeking diverse leaders to serve on boards and committees. The end result: engaged donors, stronger nonprofits and more resources more wisely invested in the community.

Rick Skinner, Vice President, Volunteer Center, United Way of Greater St. Louis, Inc.
**HometownHires: Breaking the Cycle of Generational Poverty**  
Subject Area(s): Community Impact, Corporate Engagement, Education/Income/Health, Governance, Volunteer Engagement

Recognized by the White House for its impact, HometownHires, an innovative collaboration between business, nonprofit and government, was designed to break generational poverty. The initiative provides a win-win-win proposition that you can replicate in your own community.

Benjamin David, District Attorney, North Carolina Courts, United Way of the Cape Fear Area

**Impact Monterey: A Small County Comes Together to Create a Common Agenda**  
Subject Area(s): Community Impact, Volunteer Engagement

Hear how a small county employed the principles of collective impact to uncover the shared aspirations of more than 7,400 community members, while preparing itself to successfully implement the methodology once an agenda was set.

Yuri Anderson, Vice President, Community Investments, United Way Monterey County

**Joy of Giving through Daan Utsav: India’s Publicly Owned Festival of Giving**  
Subject Area(s): Corporate Engagement, Volunteer Engagement

For five years, the United Way of Mumbai has been leveraging Daan Utsav, a publicly owned festival, as a platform for bringing together corporations, non-governmental organizations and individuals to grow resources and advance the common good. Learn to leverage public festivals and holidays in communities to engage individuals, raise awareness and generate resources to drive your mission.

Jayanti Shukla, Executive Director, United Way Mumbai

**Overhead Metrics: From Myth to Solution**  
Subject Area(s): Brand/Communications/Marketing, Operations

Do you communicate financials via pie charts, pointing to a sliver for overhead? Do you know how many donors base their giving on this metric? Break through the ‘overhead myth’ and how to move toward an ‘overhead solution.’

Ken Euwema, Vice President and Controller, United Way Worldwide
Jenny Palazio, Director, Membership Accountability, United Way Worldwide

**Response to Public Adversity: How to Rise Above the Controversy**  
Subject Area(s): Brand/Communications/Marketing, Resource Development

Using the learnings gained in our Planned Parenthood media experience, we will explore how to establish a response plan, ways to focus on the positive and align organizational efforts and how to move on following a national-level media crisis.

Afira DeVries, President and CEO, United Way of Roanoke Valley, Inc.
Using the Business Performance Index as a Strategic Planning Tool
Subject Area(s): Governance, Community Impact, Resource Development, Brand/Communications/Marketing

Recognize how to use the Business Performance Index (BPI) and other valuable United Way resources to create a strategic plan that will drive performance in impact and resource development, is rooted in your local community and aligns with our network’s direction and strategy.

Anna Murphy, President and CEO, United Way of Southwest Michigan
Rachel Wade, Director of Impact Strategies, United Way of Southwest Michigan

Solution Provider Spotlights

West Ballroom D

3:45 p.m.–4:15 p.m. Making Shared Data a Reality

This presentation is about the strategic and tactical steps surrounding the creation of a shared data measurement system for collective impact. The presentation will detail how a United Way can approach and structure a data warehouse project, utilizing the nFocus Community Solutions Data Warehouse application, to ensure the full engagement of community stakeholders, schools and academic partners, in order to make collective impact management a success at their United Way.

Jim Birney, Regional Sales Manager, nFocus Solutions
Alex Kolker, Manager, Community Impact, United Way of the Quad Cities

4:30 p.m.–5:00 p.m. Cash Back Program

Learn how you can earn 10% cash by working with your corporate sponsors and the United Way Store.

Joe Spofford, Account Manager, Staples Promotional Products

5:30 p.m.–7:00 p.m. The Hero Effect Screening 211/212/213/214

United Way and Dolphin Entertainment are knocking down the wall between entertainment and philanthropy. More than a TV docu-series, The Hero Effect is a dynamic and uplifting digital experience: an invitation to embark on a philanthropic choose-your-own-adventure. Join the producers and Heroes of the show to get a sneak peak at never before seen Hero Effect footage and to learn about you can use the show as a free and easy marketing tool in your community.

Lisa Bowman, Executive Vice President and Chief Marketing Officer, United Way Worldwide
Kathleen Cannon, President and CEO, United Way of Broward County
Stephen Moss, Partner, Holland & Knight
Sarah Soboleski, Senior Vice President, Development and Production, Dolphin Digital Media
Thursday, May 12

7:30 a.m.–10:00 a.m.   Registration and Information   Ballroom Lobby
7:30 a.m.–10:00 a.m.   Exhibits   Ballroom Foyer
7:30 a.m.–10:00 a.m.   Connection Café   West Ballroom D
8:30 a.m.–10:45 a.m.   General Session   West Ballroom A/B/C

Keynote Presentation

During his 30+ years with 3M, Inge Thulin, Chairman of the Board, President and Chief Executive Officer, has also become an outstanding supporter of United Way. As recent campaign chair of the Greater Twin Cities United Way Centennial Campaign, he understands how partnering with United Way on a local and global level aligns with 3M’s mission and strategic business plans. Mr. Thulin will share his perspective on the ongoing, successful collaboration between United Way and 3M.

Inge Thulin
Chairman of the Board, President and Chief Executive Officer of 3M

Staying Relevant in an Ever Changing World

Anat Baron is a force of nature whose forte is building brands. Her extensive background as both executive and entrepreneur put her at the forefront of consumer trends shaping our world. A born risk taker with a sharp analytical mind, collaborative leadership style and wicked sense of humor, Ms. Baron has created groundbreaking products and services, built winning teams and driven profitability for companies of all sizes. Driving Ms. Baron’s success is her belief that organizations should thrive on change rather than fear it. Her real world experience allows her to share proven strategies for building customer value, creating breakthrough products, driving innovation and generating sustainable growth.

Anat Baron
Chief Executive Officer, StashWall, Futurist and Disruptor

10:45 a.m.–11:00 a.m.   Closing Remarks   West Ballroom A/B/C
Brian A. Gallagher, President and CEO, United Way Worldwide
Diversity and Inclusion

More than 125 years ago, the diverse community leaders who founded United Way crossed cultural, religious and economic boundaries to make a difference through collective action. Today, diversity and inclusion remain vital to achieving our mission, living our values and advancing the common good. United Way network strives to foster and promote an inclusive environment that leverages the unique contributions of diverse individuals and organizations so that we can collectively and effectively create opportunities for a better life for all. We are reminded that everything we do is rooted in diversity and inclusion as a value, practice and principle. As we gather and learn together we encourage you to consider how engaging diverse voices, perspectives and populations will help to strengthen local communities and change lives – and, bring to life our mission to advance the common good. LIVE UNITED.

Learning Session Index

<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title (alphabetical by session name)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuesday, May 10</td>
<td><strong>Experts Exchanges &amp; Learning Labs</strong></td>
</tr>
<tr>
<td>11:15 a.m.–12:30 p.m.</td>
<td>Boomers Away! Strategies to Engage Retirees</td>
</tr>
<tr>
<td></td>
<td>Designing, Implementing and Funding a Family Stability Program</td>
</tr>
<tr>
<td></td>
<td>Donor Communication Strategies: Promising Practices from the Network</td>
</tr>
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<td></td>
<td>From Charity to Change: The All-In Approach to Collective Impact Implementation</td>
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<td></td>
<td>From Collaboration to Merger: Voices of Experience</td>
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<tr>
<td></td>
<td>Getting Started with Individual Engagement</td>
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<tr>
<td></td>
<td>Implementing Effective Community Initiatives at Smaller United Ways</td>
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<td></td>
<td>Orchestrating Transformation in Vulnerable Communities</td>
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<td></td>
<td>Scaling Up with Organized Labor</td>
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<td></td>
<td>So You Want to Be a Community Change Agent?</td>
</tr>
<tr>
<td>2:30 p.m.–3:45 p.m.</td>
<td>Advocacy in the Digital Age</td>
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<td></td>
<td>Board &amp; CEO Summit</td>
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<td></td>
<td>Bonding Together: Creating Long-Term Impact with Powerful Workforce Partnerships</td>
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<tr>
<td></td>
<td>Building Your Enterprise-Wide Commitment to Community Impact</td>
</tr>
<tr>
<td></td>
<td>Developing Culturally Competent Leaders: Diversity, Equity and Inclusion</td>
</tr>
<tr>
<td></td>
<td>Engaging Community and Donors to Support Children and Youth: Learn to Succees and All In For Youth</td>
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<tr>
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<td>Market Segmentation in Action: Using Generational Insights to Drive Engagement</td>
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<td>Partnering for a Purpose</td>
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<td></td>
<td>The Designation Project</td>
</tr>
<tr>
<td></td>
<td>Women's Giving: An Inclusive Approach to Individual Engagement</td>
</tr>
<tr>
<td>4:15 p.m.–5:30 p.m.</td>
<td>Black Male Achievement Initiative</td>
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<tr>
<td></td>
<td>Building Strategic Corporate Relationships: Bold Play 3 in Action</td>
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<td>Financial Education in the Community: Highly Effective Programs &amp; Partnerships</td>
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<tr>
<td></td>
<td>From Thousands to Millions The Strategies that Make it Happen</td>
</tr>
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<td></td>
<td>Geography Matters: National and Local Cross-Sector Approaches for Community Change</td>
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<tr>
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<td>Increasing Impact through Student and Retiree Engagement</td>
</tr>
<tr>
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<td>Maximizing Global Corporate Leaders Corporate Relationships</td>
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<td></td>
<td>Three Ways to Get Donors Excited About United Way</td>
</tr>
<tr>
<td></td>
<td>Using Evidence to Inspire Action and Invest in What Works</td>
</tr>
</tbody>
</table>
### Wednesday, May 11

#### 2:00 p.m.–3:15 p.m.

**Experts Exchanges & Learning Labs**

<table>
<thead>
<tr>
<th>Session</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>From Corrective Action to Competitive Advantage: How Diversity is Reshaping Our World</td>
<td></td>
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<tr>
<td>Digital Engagement for Social Good</td>
<td></td>
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<td>Engaging Women Leaders in Policy-Driven Change</td>
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<tr>
<td>Next Level of Corporate Volunteering: Strategic Engagement &amp; Major Gift Boards</td>
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<td>Optimizing the Donor Experience Through Journey Mapping</td>
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<td>Serving Those Who Have Served: United Ways Serving Veterans</td>
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<td>Shark Tank with a Heart: Blending Social Innovation and Community Impact</td>
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<td>The Art and Science Behind Engaging Millennials in the Workplace</td>
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<td>United Way Global Brand Strategy</td>
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<td>United Way's Role in Crisis Response (includes Ferguson conversation)</td>
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<tr>
<td>Well Designed Dashboards Can Lead to Better Informed &amp; Higher Performing Boards</td>
<td></td>
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</tbody>
</table>

### Wednesday, May 11

#### 3:00 p.m.–4:45 p.m.

**Poster Sessions**

<table>
<thead>
<tr>
<th>Session</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beyond Program Funding: Increasing Relevancy by Becoming a Thought Partner</td>
<td></td>
</tr>
<tr>
<td>Biggest Challenges Facing Our Organizations</td>
<td></td>
</tr>
<tr>
<td>Community Health and Community Schools: A Collective Impact Approach</td>
<td></td>
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<tr>
<td>Flexing Your Collaborative Muscles for Greater Impact</td>
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<tr>
<td>Good Shop: Community Outreach Model for Giving</td>
<td></td>
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<tr>
<td>Strengthening Your Out-of-School Time (OST) Efforts: Leveraging the Toolkit</td>
<td></td>
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<tr>
<td>Systemic Approach to a Corporate Social Responsibility Program Aimed at Community Life Improvement</td>
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<tr>
<td>The Role of Public Policy and Advocacy in the Five Bold Plays</td>
<td></td>
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<tr>
<td>United Way Mexico Toy Library Network</td>
<td></td>
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<tr>
<td>Youth for Healthy Mumbai: Public Private Partnership to Address Health Issues</td>
<td></td>
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<tr>
<td>United Way: Your Social Investment Advisor</td>
<td></td>
</tr>
</tbody>
</table>

### Wednesday, May 11

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**Experts Exchanges & Learning Labs**

<table>
<thead>
<tr>
<th>Session</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
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<td></td>
</tr>
<tr>
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<td></td>
</tr>
<tr>
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<td></td>
</tr>
<tr>
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<td></td>
</tr>
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<td></td>
</tr>
<tr>
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<td></td>
</tr>
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<td></td>
</tr>
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<td></td>
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</tbody>
</table>

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<table>
<thead>
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<th>Type</th>
</tr>
</thead>
<tbody>
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<td></td>
</tr>
<tr>
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<td></td>
</tr>
<tr>
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<td></td>
</tr>
<tr>
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<td></td>
</tr>
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<td></td>
</tr>
<tr>
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<td></td>
</tr>
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<td></td>
</tr>
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<td></td>
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<tr>
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<td></td>
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<td></td>
</tr>
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<td></td>
</tr>
</tbody>
</table>
UNITED WAY WORLDWIDE BOARD OF TRUSTEES

CHAIR OF THE BOARD
John Lechleiter
Chairman, President and Chief Executive Officer, Eli Lilly and Company, Indianapolis, Indiana

SECRETARY OF THE BOARD
Peggy Conlon
Retired President and Chief Executive Officer, The Advertising Council, Inc., New York, New York

TREASURER AND CHAIR, FINANCE COMMITTEE
Phillip N. Baldwin
President and Chief Executive Officer, The Citizens Bank, Batesville, Arkansas

CHAIR, AUDIT COMMITTEE
Rodney E. Slater, Esq.
Partner, Squire Patton Boggs, Washington, DC

CHAIR, EXECUTIVE COMPENSATION COMMITTEE
Karen Glover
Retired Global Integration Partner, K&L Gates, Seattle, Washington

CHAIR, MEMBERSHIP ACCOUNTABILITY COMMITTEE
Dr. Juliette Tuakli
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United Way Worldwide Learning and Conferencing Opportunities

ARE YOU READY for even more tools toward success at your United Way? These training and development opportunities can be customized for your local organization or for your community. Host a course to drive growth and performance within your team or use these as opportunities to engage with other community leaders to build relationships and strengthen your partnerships. Email us at learning.opportunities@unitedway.org or go to conferences.unitedway.org for more information.

**Leadership Bootcamp** is a series of learning modules recommended as an on-site “just in time” training for full teams that develop core community leadership skills and cross functional alignment of staff, volunteers and partners. Modules include project management, traits of highly effective leaders, StrengthFinders and change management.

During **Consultative Engagement**, participants learn techniques and practice the skills required to develop and build relationships in today's competitive environment. This course includes best practices and lessons learned from United Ways who have adopted the consultative engagement model. The program is offered in either THREE consecutive days or in a "2 day + 1 day" format where participants work on skills for an interim period of 8-12 weeks.

Our multi-part program, **The Product Development Process**, is designed for the community impact, brand and resource development teams to work together to meet challenges and increase resources, by aligning community impact, resource development, and marketing functions around the product development process.

Ideal for seasoned fund-raising professionals, **The Art & Science of Donor Development** helps participants understand donor motivations and how to meet the needs of donors as well as those of United Way. Utilizing donor video vignettes, ASDD allows donors to communicate directly to development professionals—sharing their experiences of giving and the impact those experiences have made on their lives. Participants will quickly realize the power of philanthropy as donors speak candidly about their deeply personal reasons for giving.

As community leaders work to promote positive change, the ability to influence public and private partners, government leaders donors and citizens is a critical core competency. The **Influencer: The Power to Change Anything** training course delivers proven strategies for business and community leaders to uproot entrenched habits and execute change initiatives in teams, organizations and communities.

Let’s face it; most people spend their days in chaotic, fast-paced, time-and-resource strained conditions. **10 Steps to Successful Project Management** provides a wide array of tools and structure to plan, organize and control project efforts so that you deliver the results the business demands! This course is PMI certified!

**COMING SOON TO ALEXANDRIA, VIRGINIA**

Enjoyed networking with colleagues in Vancouver? Want to check things out on the East Coast? Join us for these upcoming programs held in the Mary Gates Learning Center at the United Way Worldwide office outside Washington, DC. Make the most of the “lazy” summer months and register now to keep your skills growing and your impact soaring.

**Introduction to Workplace Campaigns and Resource Development**
- June 21 – 23 and August 23 – 25

**Overview of United Way**
- June 28 – 30 and September 27 – 29

conferences.unitedway.org
Save These Dates!

2016

Advocacy Forum and Capitol Hill Day
July 12-14
Alexandria, VA

July 12–14
United Way and Labor Partnership Conference
St. Paul, Minnesota

September 19–21
Finance, Talent and Technology Management Forum
Orlando, Florida

2017

May 10–12
Community Leaders Conference
Orlando, Florida

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