



**PENNSYLVANIA
COMMUNITY
FOUNDATION
ASSOCIATION**



**Third Annual Statewide Conference
September 24-25, 2024 | State College**

AGENDA OVERVIEW

TUESDAY, SEPTEMBER 24, 2024

9:00 a.m.	Conference Check-In Begins	Registration Desk 2
9:30–11:30 a.m.	Optional Pre-Conference Sessions Foundant AkoyaGo	Room 204 Room 202
12:00-1:30 p.m.	Conference Kickoff Luncheon: “If I only knew then what I know now” with panelists	Presidents Hall 3
1:45–2:45 p.m.	Opening featuring Jess King with the Steinman Institute for Civic Engagement	Presidents Hall 3
3:00–4:00 p.m.	Meet Your Peers Small Groups Networking Session	Rooms 202, 204, 205 & 208
4:00 p.m.	Hotel Check-In Begins	Hotel Lobby
5:30–7:00 p.m.	Welcome Reception sponsored by AkoyaGo	Presidents Hall 2
7:00 p.m.	Dinner with keynote Isaiah Oliver with the Community Foundation of Northeast Florida	Presidents Hall 2

WEDNESDAY, SEPTEMBER 25, 2024

7:45 a.m.	Continental Breakfast	Room 207
8:15 - 9:15 a.m.	Opening Session featuring Dr. Stephanie Gripne with the Impact Finance Center	Room 208
9:15 – 9:30 a.m.	PACFA Annual Report to Membership with Board Chair Phil Koch and President Michael Batchelor	Room 208
9:30-10:45 a.m.	Concurrent Session One	Rooms 202, 204 & 205
10:45-11:00 a.m.	Break	Room 207
11:00-12:15 p.m.	Concurrent Session Two	Rooms 202, 204 & 205
12:20-1:30 p.m.	Luncheon with keynotes Kyle Kopko, Ph.D. J.D., and Laura Dimino, Ph.D., of the Center for Rural Pennsylvania	Presidents Hall 3
1:45-2:45 p.m.	Hot Topics	Room 113, 114, 115 & 116
2:45-3:00 p.m.	Break	Room 207
3:00-4:15 p.m.	Concurrent Session Three	Rooms 202, 204 & 205
4:15-4:30 p.m.	Break	Room 207
4:30-5:00 p.m.	Closing/Wrap Up	Room 208
6:00 p.m.	Meeting for PACFA Board Members	American Ale House



AGENDA DETAIL

TUESDAY, SEPTEMBER 24, 2024

9:00 a.m.	Conference Check-In Begins	Registration Desk 2
9:30–11:30 a.m.	Optional Pre-Conference Sessions Foundant AkoyaGo	Room 204 Room 202
12:00–1:30 p.m.	Conference Kickoff Luncheon: “If I only knew then what I know now” with panelists	Presidents Hall 3

Our kickoff luncheon will feature a panel of field leaders with nearly 100 years of experience (Brian Frederick, Alex Holtel, Monica Merante and Michael Batchelor)! During a facilitated discussion, they will share career lessons learned and their hopes and dreams for our field. Lehigh Valley Community Foundation CEO, Erika Riddle Petrozelli, will moderate the conversation.

1:45–2:45 p.m.	Opening Session presented by PANewsMedia Foundation	Presidents Hall 3
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Precursor to Community Leadership, An Engaged and Informed Public

Jess King, Executive Director of The Steinman Institute for Civic Engagement

Our opening plenary will explore the crucial role of an informed and engaged public in fostering strong communities. In an era marked by rapid changes in information access and increasing polarization, this session will examine how Community Foundations and local philanthropy are investing in innovative approaches to news, information, and civic engagement. By focusing on building trust and equipping citizens for active participation, we'll delve into the foundational elements that empower community leadership and drive positive change.

3:00–4:00 p.m.	Meet Your Peers Small Groups Networking Session	Rooms 202, 204, 205 & 208
4:00 p.m.	Hotel Check-In Begins	Hotel Lobby
5:30–7:00 p.m.	Welcome Reception sponsored by AkoyaGo	Presidents Hall 2
7:00 p.m.	Keynote Dinner	Presidents Hall 2

Community Leadership in Trying Times

Isaiah Oliver, President of the Community Foundation of Northeast Florida and CFLeads Board Chair
Introduced by Lisa Schroeder, CEO The Pittsburgh Foundation

Our keynote speaker, Isaiah Oliver, will explore how philanthropy can address challenges during crises. As the former President and CEO of the Community Foundation of Greater Flint, Oliver led efforts during the Flint water crisis, working to restore trust and support impacted children. Now the President and CEO of the Community Foundation for Northeast Florida, Oliver focuses on creating meaningful change through collaboration. With his deep experience, including as a Civic Society Fellow at the Aspen Institute, Oliver will inspire leaders to drive community impact, even in the most difficult times.

AGENDA DETAIL

WEDNESDAY, SEPTEMBER 25, 2024

7:45 a.m. Continental Breakfast Room 207

8:15 - 9:15 a.m. Opening Session Room 208

Catalyzing \$1 Trillion for Good

Dr. Stephanie Gripne, Founder of the Impact Finance Center

Dr. Stephanie Gripne, a leading visionary in the impact investing and financial innovation movement, is founder and CEO of Impact Finance Center (IFC). With over a decade of experience collaborating with community foundations, Dr. Gripne has become a trusted guide for foundation leaders entering the impact investing space for the first time, as well as for those seeking to significantly expand and diversify their investments. As a pioneer in establishing statewide impact investing marketplaces that span all sectors, asset classes, and stages of growth, Dr. Gripne will reveal a transformative axiom: communities have the resources they need to solve their own problems. She will share her blueprint for Main Street 2.0: Bringing the Best of Wall Street to Main Street which can be adopted by any community to build infrastructure for local investment. How do we catalyze 1 trillion dollars for good? 5 million, 50 million, and 500 million dollars at a time!

9:15 – 9:30 a.m. PACFA Annual Report to Membership with Board Chair Phil Koch and President Michael Batchelor Room 208

9:30-10:45 a.m. Concurrent Session One Rooms 202, 204 & 205

Trust Based Philanthropy

Room 202

Michelle McMurray, Vice President of Program and Community Engagement, The Pittsburgh Foundation

Trust-based philanthropy is a movement that aims to address the inherent power imbalances between funders, nonprofits and the communities they serve in pursuit of a healthier, more equitable nonprofit ecosystem. Using The Pittsburgh Foundation's journey to ground the discussion, this session will provide an overview of Trust-based philanthropy's practices and principles and explore strategies for incrementally building trust-based practices and deepening community relationships in your grantmaking. The session will also offer an opportunity to examine the challenges of and opportunities for implementing trust-based philanthropy in the unique context of community foundations. Participants can expect to walk away with actionable ideas that they can integrate into their existing work, from internal culture to community leadership.

Advocacy and Public Policy: Where to Start, What to Do and What to Avoid

Room 204

Phil Koch, Vice President of Public Policy, The Pittsburgh Foundation

Maura Jacob, Policy and Community Impact Officer, The Pittsburgh Foundation

Are you a community foundation eager to venture into public policy and advocacy but unsure where to begin? Join us for an insightful workshop designed specifically for foundations at the starting line. We'll demystify the essentials of public policy and advocacy, providing a clear roadmap for initiating impactful work in these areas. Learn the key steps to get started, understand the critical do's and don'ts, and discover how to effectively leverage your foundation's unique position to influence positive change. This session will equip you with the knowledge and tools to confidently embark on your advocacy journey, avoiding common pitfalls and setting a solid foundation for success.

Navigating the Hard Conversations: From Theory to Practice

Room 205

Ryanne Jennings, President and CEO, Wayne County Community Foundation

Maggie Martinelli, Chief Operating Officer, Scranton Area Community Foundation

Laura Ducceschi, President and CEO Scranton Area Community Foundation

Working with others for the benefit of the community can be challenging and require some hard conversations. This session will include some of the documented best practices that can be helpful when navigating difficult conversations with donors, community members, and partners. Participants will also learn from peers about how community foundations can lead change by being effective communicators during hard conversations.

10:45-11:00 a.m.

Break

Room 207

11:00-12:15 p.m.

Concurrent Session Two

Rooms 202, 204 & 205

107 community foundations across 31 states. How does your shop compare?

Room 202

Andrew Zach, CAIA, Senior Vice President, Fund Evaluation Group
MJ Bobyock, CFA, Senior Vice President, Fund Evaluation Group

FEG's 2024 Community Foundation Survey reveals key trends in how peers invest their assets, offering invaluable insights for strategic decision-making. Since its inception in 2015, the survey has expanded from a simple client request for peer data on investment performance to a comprehensive resource covering portfolio management, spending, and impact investing. With participation from over 200 foundations nationwide, this survey enables foundations to benchmark themselves against peers of similar size and supports data-driven decisions in areas like staffing, governance, fundraising, and investment policy. Participants will also explore emerging enterprise trends, including responsive investing and investing with a DEI lens, and how these trends are shaping the management of long-term investments. This session provides a unique opportunity to learn from the collective experiences of community foundations across the country and apply those insights to enhance your organization's financial strategies.

Navigating Change in the Philanthropic Sector (and beyond!)

Room 204

Jennie Zioncheck, Chief of Staff and Strategic Implementation, The Pittsburgh Foundation
Michelle McMurray, Vice President of Program and Community Engagement, The Pittsburgh Foundation
Emmie Calland, Director of Strategic Projects and Foundation Initiatives, The Pittsburgh Foundation

Philanthropic organizations, regardless of mission, size, or scope, are increasingly embracing change in their culture, operations, and programs. This shift has been driven by external forces like the COVID-19 pandemic and the 2020 uprisings for racial justice, which have highlighted the need for greater accessibility, responsiveness, and equity. In other cases, new leadership has brought fresh visions requiring the development of new capacities, while outdated technology and business models challenge critical infrastructure. This session offers an interactive platform for peers to share their experiences navigating organizational change, discussing tools and strategies that have proven effective. Participants will explore the sources and impacts of change, delve into field examples, and identify the qualities that enable individuals and organizations to thrive in uncertain times.

Nonprofit Capacity Building: Continuum of Models

Room 205

Adam Bratton, Executive Director, The Nonprofit Partnership

This session will delve into the concept of nonprofit capacity building, focusing on a range of models and strategies designed to strengthen nonprofit organizations. Participants will explore the continuum of capacity-building efforts, from foundational elements such as infrastructure and staffing to more advanced approaches like collaboration, systems improvement, and long-term sustainability. The presentation will also address how different models can be tailored to meet the needs of nonprofits at varying stages of development and across communities with diverse capacity levels.

12:20-1:30 p.m.

Keynote Luncheon

Presidents Hall 3

The \$418 Billion Dollar Question Center for Rural Pennsylvania Transfer of Wealth Study and what to do with it?

Kyle Kopko, Ph.D. J.D., Executive Director, Center for Rural Pennsylvania
Laura Dimino, Ph.D., Assistant Director, Center for Rural Pennsylvania

Attendees will learn about projections for the transfer of wealth by county in PA and how much may be available for charitable grantmaking. This will be followed by a presentation and interactive discussion among PACFA members on the PA Giving Pledge, a potential follow up campaign to encourage increased legacy gifts to community foundations within the Commonwealth.

1:45-2:45 p.m. Hot Topics Room 113, 114, 115 & 116

Outsourced Chief Investment Officer – Is this for you and how do you choose? Room 113

Claudelle Géhy, CFA, Senior Investment Consultant & Director of ESG Research, Mason Investment Group

Education Reform in Pennsylvania Room 114

Myra Forrest, Education Advocate, Pottstown Area Health and Wellness Foundation

Childcare and Economic Mobility Room 115

Angie Berzonski, Associate Director, Community Foundation for the Alleghenies
Mishelle Beith, Development Manager, Bridge Builders Community Foundation
Megan Briggs, Director of Community Investments, Lehigh Valley Community Foundation

Raising Unrestricted Endowment Room 116

Ralph Serpe, President and CEO, Adams County Community Foundation

2:45-3:00 p.m. Break Room 207

3:00-4:15 p.m. Concurrent Session Three Rooms 202, 204 & 205

Collective Philanthropy: Building a Culture of Giving by Engaging and Empowering People Room 202

Laura Ducceschi, President and CEO, Scranton Area Community Foundation
Olivia Burgess, Philanthropic Service Officer, Erie Community Foundation
Dave Pedri, President and CEO, Luzerne Foundation
Kara Seesholtz, President and CEO, Community Giving Foundation

When individuals or organizations come together to pool resources and efforts, community foundations see positive impact. Whether these structures are called giving circles, collective giving, donor circles, or other terms, successful models often result in new donors, more resources, a deeper engagement, and transformative impact on communities. Hear from four community foundations that are seeing noteworthy results from their collective philanthropy efforts focused on women, young professionals, communities of color, youth, and other stakeholders.

Financial Story Telling Room 204

Rebecca W. Jacklin, Senior Vice President, Director, National Strategy, PNC Bank
Doug Berman, Partner, RKL and RKL Not-for Profit Industry Group Leader

This session will equip nonprofits and community foundations with the tools to effectively articulate their financial story to the community and donors. Through a collaborative discussion led by PNC and RKL LLP, participants will explore a five-step framework designed to clearly communicate an organization's financial needs. The session will cover key steps, best practices, and real-world examples of "Making the Big Ask" to existing donors and funders. By mastering these techniques, nonprofits can strengthen their financial messaging, enhance donor engagement, and better support their long-term goals. Whether you're a community foundation or a nonprofit partner, this session provides practical insights to help you confidently convey your financial story and secure vital support.

Leveraging Generative AI to Help Community Organizations Do More with Less Room 205

Nittany AI Alliance

In this session, we'll explore how generative AI, such as ChatGPT, can empower community organizations to maximize their impact with limited resources. From automating routine tasks like donor outreach and content creation to streamlining data analysis and reporting, AI offers innovative solutions for improving efficiency and reducing workload. We'll dive into practical examples of AI in action, ethical considerations, and simple steps to begin integrating AI tools into your organization's daily operations. Whether you're looking to save time, optimize efforts, or scale your initiatives, this talk will provide actionable insights on how AI can help you do more with less, allowing you to focus on what truly matters—serving your community.

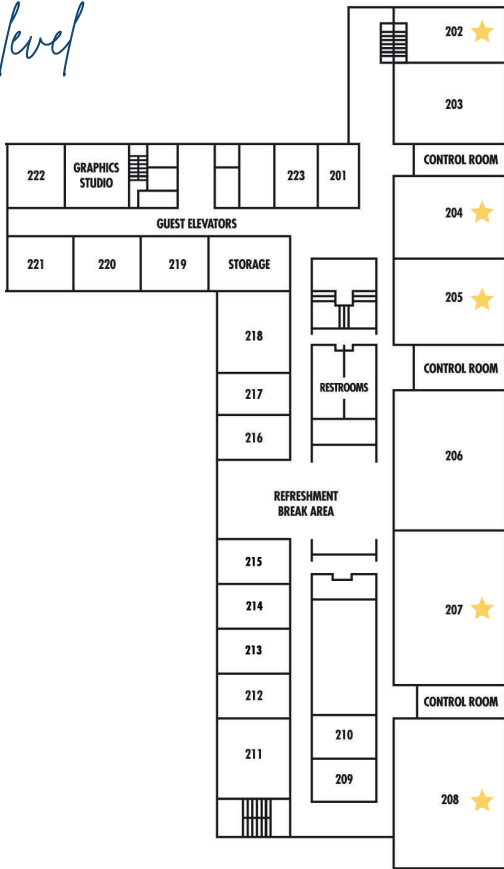
4:15-4:30 p.m. Break Room 207

4:30-5:00 p.m. Closing/Wrap Up Room 208

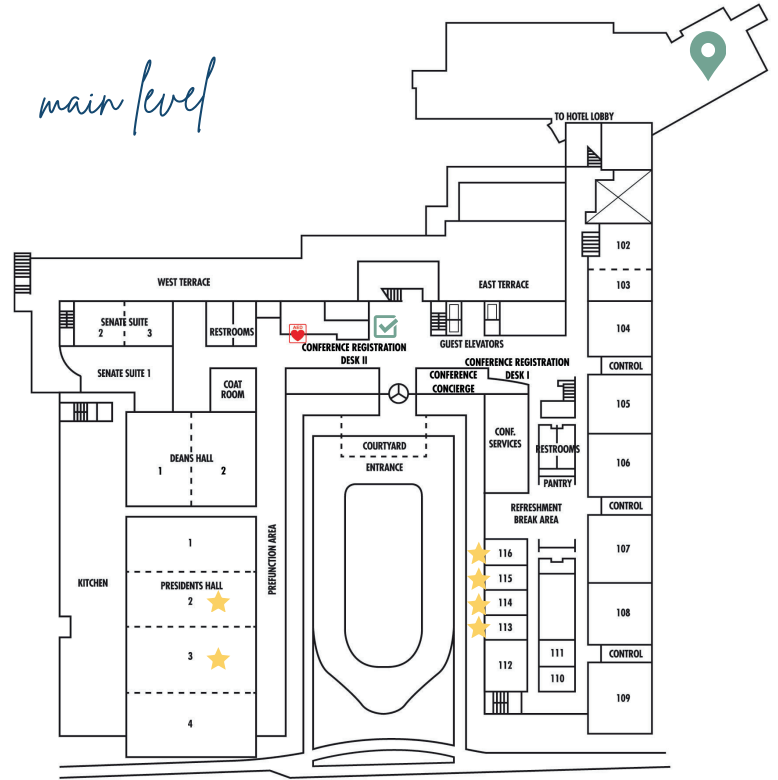
6:00 p.m. Meeting for PACFA Board Members American Ale House

Navigate the Conference

second level



main level



Thank you, sponsors!

