



# PENN-JER-DEL-MD REGIONAL COMMUNITY FOUNDATION 1-DAY GATHERING

## PENN-JER-DEL-MD REGIONAL COMMUNITY FOUNDATION 1 DAY GATHERING Tuesday, July 23, 2019

[Hirtle Callaghan Conference Center & Offices](#)

300 Barr Harbor Drive, Five Tower Bridge, Fifth floor, West Conshohocken PA 19428

*At the hub of Rt. 476 & Rt. 76. Readily accessible from PA Turnpike/Rts. 476, 276, 76, 202 & 422*

### AGENDA

#### 9:00 Coffee, Networking, Tours of Hirtle Callaghan

*Please bring collateral for the CF resource table. 40 copies should be enough.*

#### 9:30 Welcome, Introductions ... Auditorium Plenary

Host Welcome from Chris Valerio, CFA, Vice President, Hirtle Callaghan & Karen Simmons, ChesCo CF  
*Thanks for ideas generated by Stuart Comstock-Gay, Pedro Ramos, Ralph Serpe, Frances Sheehan*

#### 9:35 Show & Tell: What's Best & Brightest at Your Community Foundation?

Round-the-room sharing: What distinguishes your community foundation from others?  
What initiatives, strategies &/or triumphs are you particularly proud of?

#### 11:30 Scholarship Advocacy Initiative: Concept in Development ...Ralph Serpe...Adams County CF

- Many community foundation scholarships are awarded & then displaced by college financial aid
- What are some solutions CFs can explore?
  - agreements with local colleges
  - exercising variance power
  - converting Scholarship Funds into funds that support students in a particular school district
  - Maryland: enacted an anti-displacement law (financial aid can't reduce the amount of financial aid because of a scholarship). Any CF's interested in exploring similar legislation in PA?

#### 11:45 Working Lunch, provided courtesy of Hirtle Callaghan ... Café Tables

Networking & Best Practices: Learning From Each Other

2 rounds (12-12:40 & 12:45-1:20) move to new tables for Lunch & then Dessert

#	Roundtable Topic	Session #1 Discussion Facilitator	Session #2 Discussion Facilitator
1	2020 Census & Role of CFs		Nell Booth, Phila Fdtn
2	Building Capacity of Nonprofits	Phil Fitzgerald, Phila Fdtn Corrine Sylvia, SylviaCarter Consulting	Corrine Sylvia, SylviaCarter Consulting
3	Family Philanthropy, Donor Engagement & Stewardship: overall approach & structure	Erika Riddle Petrozelli, Lehigh Valley Fdtn & Eliza Phillips, Phillips Philanthropy Advisors	Neil Sumilas, NCFP
4	Financing Our CF/The CF Business Model: How Do We Cover Our Operating Expenses Each Year?	Bob Ferguson, ChesCo CF	
5	Investments	Hirtle Callaghan	Hirtle Callaghan
6	Marketing Initiatives for CFs: what works best?	Beth Krallis, ChesCo CF	

7	Millennial Engagement: Smart Giving Circles, Mini-Grant Panels, Social Media Outreach, Craft Beer & Hatchet Throwing...what works?	Stephanie Stevens, ChesCo CF	Eliza Phillips, Phillips Philanthropy Advisors
8	National Standards Accreditation: the good, the bad & do we really need THAT?!?@#!		
9	Professional Advisors/Estate Planning Councils	Betsy Day, CF of Frederick Co	Joan Hoge-North, Delaware CF
10	Regional Assessments & Surveys: Prioritizing Community Needs & CF Program/Grantmaking Priorities	Sarah Grunewald, Delaware CF	Xxx
11	Scholarship Advocacy & Systems Change	Ralph Serpe, Adams Co. CF	
12	Scholarship Policy & Administration		Kevin Baffa, ChesCo CF
13	Social Media: Analytics	Noreen Cahalane & Shannon Simmons, Merz Branding	Noreen Cahalane & Shannon Simmons, Merz Branding
14	The Trump Effect: Civil Society & Philanthropy In the Age of Trump	Stuart Comstock-Gay, Delaware CF Krys Sipple, Krystine Sipple Consulting	Kristine Parkes, CRFE, Kultivate
15	CEOs: What Keeps Us Up at Night		

### 1:30 ESG Investment Considerations for Community Foundations ... Auditorium Plenary

- **Issues & Trends in ESG: Environmental, Social & Governance Investing: A More Sustainable World:**  
Garrett Wilson, Investment Specialist, Hirtle Callaghan
- **Investment Partners = Returns/Core Values + Donor Service + Community Engagement...** Full discussion

### 2:00 National Updates ... Auditorium Plenary

*10 minute speakerphone call ins w/ppt display. 5 minute debriefs between phone calls.*

**2:00 Council on Foundations** (by phone) on screen <http://www.cfuintedconference.org/>

**Results of CF Executive Roundtables - CF Effectiveness**

**2020 CFUnited: Community Foundations: Power of Place, Conf April 5-8 2020, Detroit MI**

AdNet for professionals in fund development & donor services

CommA for communications professionals

ProNet for program officers

Natalie Ross, Vice President of Membership and External Relations, 202.991.2517 for

Brad Ward, Director, Community Philanthropy, Council on Foundations (in CF United meeting)

1255 23rd Street NW, Suite 200, Washington DC 20037 [brad.ward@cof.org](mailto:brad.ward@cof.org) 703.879.0640

### 2:15 CF Leads

Deborah A. Ellwood, President and CEO, CF Leads (by phone)

with CF Leads Board Members Pedro Ramos Esq. & Stuart Comstock-Gay (in person)

PO Box 509, Accord MA 02018 [dellwood@cfleads.org](mailto:dellwood@cfleads.org) 617.854.3542

### 2:30 National Center for Family Philanthropy-COMMUNITY FOUNDATION NETWORK

Neil Sumilas, Vice President for Planning & Management, National Center for Family Philanthropy (in person)

1667 K St NW, Suite 550, Washington DC 20006 [neil@ncfp.org](mailto:neil@ncfp.org) 202.350-9380

### 2:45 Grantmakers PA: Sept. 17 & 18, 2019 CF Gathering

@ Penn Stater Hotel & Conference Center, 215 Innovation Blvd, State College PA 16803

Barbara Taylor, Grantmakers of W PA & Sidney Hargo, Philanthropy Network Philadelphia (in person)

[btaylor@gwpa.org](mailto:btaylor@gwpa.org) 412.471.6488



### 3:00 Today's Added Value ... Auditorium Plenary

- What is your **most useful** takeaway from today's gathering?

### 3:30 Depart. Drive Safely!