



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

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**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		xxx, Phila Fdtn
2	Building Capacity of Nonprofits	Phil Fitzgerald, Phila Fdtn Corrine Sylvania, SylvaniaCarter Consulting	Corrine Sylvania, SylvaniaCarter 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	Xxx, Phila Found

5	Investments	Hirtle Callaghan	Hirtle Callaghan
6	Marketing Initiatives for CFs: what works best?	Beth Krallis, ChesCo CF	xxx
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?!?@#!		xxx
9	Professional Advisors/Estate Planning Councils	Betsy Day, CF of Frederick Co	Beth Harper Briglia, ChesCo CF
10	Regional Assessments & Surveys: Prioritizing Community Needs & CF Program/Grantmaking Priorities	xxx, Delaware Comm Fdtn	Xxx
11	Scholarship Advocacy & Systems Change	Ralph Serpe, Adams Co. CF	
12	Scholarship Policy & Administration	Kevin Baffa, ChesCo CF	Xxx
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	Kristine Parkes, CRFE, Kultivate	Krys Sipple, Krystine Sipple Consulting
15	CEOs: What Keeps Us Up at Night	xxx	Xxx

### 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

##### Results of Community Foundation Executive Roundtables - CF Effectiveness

##### 2020 CFUnited: Community Foundations: Power of Place, Conf April 5-8 2020, San Antonio TX

Brad Ward, Director, Community Philanthropy, Council on Foundations *(by phone)*

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!

TO RSVP for this free gathering, please email  
Karen Simmons, Chester County Comm Fdtn, [karen@chescofc.org](mailto:karen@chescofc.org)  
(610) 299 2219 cell/text [www.chescofc.org](http://www.chescofc.org)

Include names, titles & emails of registrants.

If you would like to help facilitate a breakout group, please indicate topic. THANKS!