



PENN-JER-DEL-MD REGIONAL COMMUNITY FOUNDATION

1 DAY GATHERING on **Mon., July 25, 2022**

[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

*Please bring 25
copies of
collateral
for the
CF resource table*

AGENDA

9:00 Coffee, Networking, Tours of Hirtle Callaghan

9:30 Welcome, Introductions ... Auditorium Plenary

Welcome: Karen Simmons CEO & Winnie Sebastian Esq, Board Chair, Chester Co Community Foundation

Hosts Chris Valerio, CFA & Nick Fazzi CFA, Hirtle Callaghan

PACFA Welcome from Mike Batchelor, President, PA Community Foundation Association

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

Who's Here: Overview/Summary of www.surveymonkey.com/r/CFPROFILE2022

Round-the-room sharing: What initiatives, triumphs &/or learnings are you particularly proud of?
What challenges lie ahead?

Spotlight - Scholarship Award Displacement & Donor Intent ... Ralph Serpe, Adams County CF

Noon Working Lunch, provided courtesy of Hirtle Callaghan ... Café Tables

Best Practices: Learning From Each Other

2 rounds: 12:15-12:45 lunch → move to new tables → 12:50-1:20 dessert

#	Roundtable Topic	Round #1 Discussion Facilitator	Round #2 Discussion Facilitator
1	Civic Engagement & Democracy	Stephenie Stevens, ChesCoCF	Stuart Comstock-Gay, Delaware CF
2	Diversity, Equity & Inclusion	Sarah Grunewald, Delaware CF	Hugh Bleemer, ChesCoCF
3	Family Philanthropy & Donor Engagement	Beth Harper Briglia, CPA CAP, ChesCoCF	Rebecca Elzey, Delaware CF
4	Giving Sprees/Extraordinary Gives	Dave Koser &/or Tracy Cutler, Lancaster Co CF	Ralph Serpe &/or Lisa Donohoe, AdamsCo CF
5	Investments, ESG, SRI	Chris Valerio CFA, Hirtle Callaghan	Robert Eberley CFA, Hirtle Callaghan
6	IT: CyberSecurity (1) Conversion (2)	CyberSecurity w/Erik Gudmundson, Pegasus	CRM & Fin Database Conversions w/Beth Krallis, ChesCoCF
7	Marketing Initiatives for CFs	Mike DiPaolo, Delaware CF	Kara Seesholtz, CommGiving Fdtn
8	Professional Advisors/Estate Planning Cncls	Rebecca Elzey, Delaware CF	Mike DiPaolo, Delaware CF
9	Building Nonprofit Capacity	Holly Morrison, CommGiving Fdtn	Stephenie Stevens, ChesCoCF
10	Regional Assessments & Surveys	n/a	Sarah Grunewald, Delaware CF
11	Scholarships	Award Displacement & Donor Intent w/Ralph Serpe, Adams Co CF	n/a
12	CEOs: What Keeps Us Up at Night	Self-facilitated, of course...in conf room	Self-facilitated, of course...in conf room

1:30 CF Professional Service Organizations ... Auditorium Plenary

- What PSOs are you a member of or do you **participate in**?
- Which services of the various PSOs **add value** to you in your work?
- Do you feel there are any particular **gaps** that no PSOs are adequately filling at this point?

Crewcial Partners (formerly Colonial Consulting)

quarterly investment returns for CFs by asset size

<https://www.crewcialpartners.com/>

Q1: When it comes right down to it, REALLY...how important are investment returns to our Fund Advisors & Donors? To our Board? To our Staff? To our Investment Committee?

Q2: How/Do we **measure/weigh (account for)** Investment Returns + SRI/ESG concepts + Donor Service + Community Engagement

Jeff Vega, Ralph Serpe, Stuart Comstock-Gay, Karen Simmons

Council on Foundations Community Fdtns Support Team

<https://www.cof.org/page/community-foundation-programs-services>

communityfoundations@cof.org

Melissa Nolan, Manager of Engagement, Washington DC

20037 melissa.nolan@cof.org 202.991.2225

COF National Standards

<https://www.cof.org/page/national-standards-us-community-foundations%C2%AE>

Kevin van Bronkhorst, Executive Director, National Standards

kevin.vanbronkhorst@cof.org

Ralph Serpe of Adams County CF, Board Member

CF Insights by Candid

<https://cfinsights.candid.org/s/>

David Rosado, Director of Network Engagement,

david.rosado@candid.org

Jeff Vega, Princeton CF, Advisory Committee Member

CF Leads

<https://cfleads.org/>

Stuart Comstock-Gay, Delaware CF, Board Member

(Pedro Ramos Esq., Phila Foundation, Board Chair...in Portland today)

GuideStar by Candid – Nonprofit Data

<https://www.guidestar.org/>

National Center for Family Philanthropy

<https://www.ncfp.org/community-overview/community-foundations/>

Tony Macklin, Program Manager, NCFP Community

Foundations Family Philanthropy Network

Beth Harper Briglia CPA CAP, ChesCo CF, Adv Board

PACFA Pennsylvania Community Foundation Association

www.pacfapartners.org

Mike Batchelor, President, 602 Walnut St., Erie, PA 16502

mike@pacfapartners.org 814.868.8930 814.882.2521 (cell)

3:15 Today's Added Value ... Auditorium Plenary

What are your **most useful** takeaways from today's gathering?

What good ideas did you glean? What did you discover today that inspires you?

3:30 Depart. Drive Safely!

