



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

PENN-JER-DEL-MD REGIONAL COMMUNITY FOUNDATION 1 DAY GATHERING on **Tues., July 22, 2025**

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

9:30 Welcome, Introductions ... Auditorium Plenary

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

Today's Aims & Agenda: Karen Simmons CEO, Chester Co Community Foundation

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

Overview/Summary of www.surveymonkey.com/r/CFPROFILE2025

Highlights: 8-minute timer per CF team

1. CEO introduce team
2. **Highlight** 1 or 2 milestones or initiatives of particular significance to your CF
3. What **challenges** lie ahead for your CF? How have **sweeping federal changes** impacted your community foundation's programs, services, donors, nonprofits, investments, etc.

12:15 PACFA Update PA Community Foundation Association

Fall Conference: Sept 25 & 26, Hershey PA

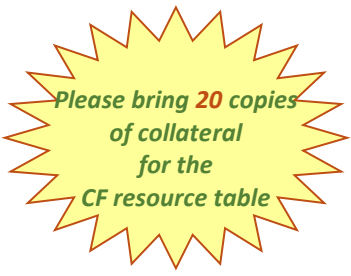
CEO Learning Cohort...Stuart Comstock-Gay, starting Sept 24 from 3-5 in Hershey PA

www.pagivingpledge

CF's as the default option when someone dies intestate...Ralph Serpe

Mike Batchelor, President, 602 Walnut St., Erie, PA 16502 814.868.8930 814.882.2521 (cell)

mike@pacfapartners.org www.pacfapartners.org



Please bring **20 copies**
of collateral
for the
CF resource table

12:30 Working Lunch, provided courtesy of Hirtle Callaghan ... Café Tables

#	Roundtable Topic: Learning from Each Other	Discussion Facilitator
1	Communications Strategy	Katy Lichtenstein, Fdn Delaware County
2	Family Philanthropy & Donor Engagement	Maribeth Pryzwara, Delaware CF
3	Grants Administration	Kim Gilmore, Philadelphia Fdn
4	Investment Models, Scorecards	Chris Valerio & Nick Fazzi, Hirtle Callaghan
5	Professional Advisors, Estate Planning Councils	Jason Arbacheski, CAP, ChesCo CF
6	Meeting the Moment	Sarah Hensch, Delaware CF
7	Nonprofit Capacity Building: Coping With Cutbacks	Chaya Scott, ChesCo CF & Amy Betts, Scranton Area Fdn
8	Scholarship Admin & the Use of AI in Scholarship Essays	Kelly Sheridan, Delaware CF
9	Tech Administration	Rebecca Elzey, Delaware CF
10	Working with Latino/Immigrant-Serving orgs	Jennifer Fuqua, Delaware CF
11	CEOs: Joys & Challenges	Conf Room TBD

<https://a250friends.org/>

1:30 America 250 – What is Your CF Doing for America’s 250th? ... Auditorium Plenary



Throughout 2026, the United States celebrates its 250th anniversary of the signing of the Declaration of Independence from the rule of the King of Great Britain. What is your CF doing to help your community have interactive, inclusive, compelling experiences, to:

- 1-encounter the many ways in which your region participated in and influenced our nation’s founding;
- 2-elevate everyone’s understanding of our continuing journey to build a more perfect union.

Life, Liberty & the Pursuit of Happiness...for All.

1:45 Marketing Makeover, Yr #1 ... Auditorium Plenary

Robbie Tarpley Raffish, VP for Communication & Marketing, Delaware CF



Community Foundation Awareness Initiative

- Reworking our brand & creating our brand story
- Launching our new podcast & launching our new ad campaign
- Developing our crisis communication plan
- 40th anniversary planning

2:30 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 **gaps** that no PSOs are adequately filling at this point?

Council on Foundations Community Fdtns Support Team

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

David Rosado, Senior Advisor, Community Philanthropy

communityfoundations@cof.org

Sam Bressi of Lancaster Co CF, COF Board Member

CF Insights

<https://cof.org/cfindights> david.rosado@cof.org

David Rosado, Senior Advisor, Community Philanthropy

CF National Standards

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

Kevin van Bronkhorst, Exec Director, kevin.vanbronkhorst@cof.org

Ralph Serpe of Adams County CF & Jennifer Doyle of

The Foundation for Enhancing Communities, Board Members

CF Leads

<https://cfleads.org/>

Mary Thomas, President/CEO, mthomas@cfleads.org

Stuart Comstock-Gay, Board Member

Pedro Ramos Esq., Phila Foundation, Past Chair

GuideStar by Candid – Nonprofit Data

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

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

What are your **most useful** takeaways from today? What did you discover that inspires you?

3:30 Depart. Drive Safely!

