

# AGENDA

## Sunday, March 18

5:00 PM - 7:00 PM | GRAND BALLROOM FOYER | REGISTRATION DESK 1  
REGISTRATION

5:00 PM - 7:00 PM | GRAND BALLROOM F  
EXHIBIT HALL WELCOME RECEPTION

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## Monday, March 19

8:00 AM - 4:30 PM | GRAND BALLROOM FOYER | REGISTRATION DESK 1  
REGISTRATION DESK OPEN

8:00 AM - 4:15 PM | GRAND BALLROOM F  
EXHIBIT HALL

8:00 AM - 9:00 AM | GRAND BALLROOM H  
BREAKFAST

*Sponsored by The Chicago Community Trust*

9:00 AM - 9:15 AM | GRAND BALLROOM A  
WELCOME & OPENING  
REMARKS

### SPEAKER

**Jodi Spataro**, Chief Advancement Officer,  
Community Foundation of Elkhart County

9:15 AM - 10:15 AM | GRAND BALLROOM A  
PLENARY SESSION

The Role of Community Foundations in  
Shaping the Nonprofit Sector of the Future

### SPEAKER

**Vu Le**, Executive Director, Rainer Valley Corps

10:15 AM - 10:45 AM | EXHIBIT HALL, GRAND  
BALLROOM F

NETWORKING BREAK

*Sponsored by Community Foundation of the  
Fox Valley Region*

***Never type the same thing twice***

**Community  
Akoya.net**

**Integrated online foundation  
software that works the way you do.**

***Connected. Committed. Creative.***



10:45 AM - 12:00 PM

## CONCURRENT BREAKOUTS

↳ **Back to Basic, Donor Services Day One | Grand Ballroom G**

SPEAKER

**Eric Anderson**, Director of Stewardship, The Minneapolis Foundation

↳ **The PR North Star for Your Community Foundation | Grand Ballroom D**

SPEAKERS

**Elyse Hammett**, VP, Marketing & Communications, Community Foundation for Greater Atlanta

**Louise Mulherin**, PR Manager, Community Foundation for Greater Atlanta

↳ **Community Foundations as Capacity Builders | Grand Ballroom E**

SPEAKERS

**Monique Jones**, President & CEO, Evanston Community Foundation

**Marybeth Schroeder**, VP of Programs, Evanston Community Foundation

**Colton C. Strawser, MS, CFRE, CNP**, President, Colton Strawser Consulting

↳ **Amplifying Online Giving with DFX | Grand Ballroom C**

SPEAKERS

**Cyndi McAtee**, VP, Product Development, RenPSG

**Kelly Palmer**, Executive VP, Client Experience, RenPSG

12:00 PM - 1:30 PM | GRAND BALLROOM A & H

## LUNCH & PLENARY SESSION

Community Foundations and Disaster Relief

*Lunch Sponsored by The Alford Group*

MODERATOR

**Emmett D. Carson, PhD**, CEO & President, Silicon Valley Community Foundation

PANELISTS

**Elizabeth Brown**, President & CEO, Community Foundation Sonoma County

**Nelson I. Colon**, President & CEO, Puerto Rico Community Foundation

**Stephen D. Maislin**, President & CEO, Greater Houston Community Foundation

1:30 PM - 2:45 PM

## CONCURRENT BREAKOUTS

↳ **Tiny CFs - How Do We Get It All Done? | Grand Ballroom C**

SPEAKER

**Julianne Buck**, CEO, Community Foundation of Grundy County

↳ **All Hands on Deck: Aligning Around Community Leadership | Grand Ballroom D**

FACILITATOR

**Deborah Ellwood**, President & CEO, CFLeads

# AGENDA

## ↳ Disaster Relief Panel Follow Up: Grantmaking | Grand Ballroom G

### SPEAKERS

**Leslie Anne Jackson**, Director of Grants & Scholarships, North Carolina Community Foundation

**Mari Ellen Loijens**, Chief Business, Development & Brand Officer, Silicon Valley Community Foundation

**Renee Wizig-Barrios**, Senior VP & Chief Philanthropy Officer, Greater Houston Community Foundation

## ↳ This Is Us: When Advancement & Communications Come Together | Grand Ballroom E

### SPEAKERS

**Michelle Fritz**, Director of Development & Donor Communications, Cleveland Foundation

**Michael Murphy**, Chief Marketing Officer, Cleveland Foundation

## ↳ Remedies For What Keeps You Up At Night | Grand Ballroom A

### SPEAKERS

**Bradley Hurlburt**, President & CEO, Community Foundation for Palm Beach and Martin Counties

**Phillip Lanham, CAP**, VP, Donor & Private Foundation Services, The Greater Cincinnati Foundation

**Fidelma McGinn**, VP, Philanthropic Services, Seattle Foundation

**Jamie Phillippe, CFRE**, Vice President, The Alford Group

**Sharon Tiknis**, Executive VP & East Division Manager, The Alford Group

2:45 PM - 3:00 PM | EXHIBIT HALL, GRAND BALLROOM F

## NETWORKING BREAK

3:00 PM - 4:15 PM

## CONCURRENT BREAKOUTS

### ↳ Cracking the Professional Advisor Nut: Building Relationships and a Referral Network for Your Foundation | Grand Ballroom E

#### SPEAKER

**Frank Horrell**, Director of Professional Advisor Development, Community Foundation of Greater Memphis

### ↳ Communications and Inclusion: Reaching and Engaging a Diverse Audience | Grand Ballroom D

#### SPEAKERS

**Genna Freed**, Communications Officer, The Findlay-Hancock County Community Foundation

**Eva Penar**, Director of Marketing & Communications, The Chicago Community Trust



Our clients are working hard to make the world a better place.

By providing thoughtful, practical and effective counsel, we can improve and expand the philanthropic reach of community foundations of every size. Our dedication to providing strategic solutions is built on our collective industry-specific experience, savvy and overwhelming desire to do good.

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## ↳ Introduction to Grantmaking | Grand Ballroom C

### SPEAKER

**Colton C. Strawser, MS, CFRE, CNP**, President, Colton Strawser Consulting

## ↳ Top 10 Ways to Position Your Foundation to Serve Generous Families | Grand Ballroom A

### SPEAKERS

**Kirsten Kilchenstein**, VP of Donor Relations, The Oregon Community Foundation

**Marisa Ogles**, VP, Donor Services & Engagement, Community Foundation of Greater Chattanooga

**Katherine Scott**, Program Director, National Center for Family Philanthropy

**Jodi Spataro**, Chief Advancement Officer, Community Foundation of Elkhart County

## ↳ Legal Session | Grand Ballroom G

*Session made possible with support from Council on Foundations*

### SPEAKERS

**Bryan Del Rosario**, Staff Counsel, Council on Foundations

**Brad Ward**, Director of Community Philanthropy, Council on Foundations

4:15 PM - 4:30 PM | GRAND BALLROOM A

## CLOSING REMARKS

### SPEAKER

**Eric Hozempa**, Executive Director, Longmont Community Foundation

7:00 PM - 9:00 PM | THE DOLPHIN BAR AT THE MIRAGE

## CFUNITED RECEPTION

The Dolphin Bar is located at The Mirage pool. Please follow the hotel's directional signage to the pool area; once you are in the pool area please follow the CFUnited signs.

## Tuesday, March 20

8:00 AM - 4:30 PM | GRAND BALLROOM FOYER | REGISTRATION DESK 1

## REGISTRATION DESK OPEN

8:00 AM - 3:15 PM | GRAND BALLROOM F

## EXHIBIT HALL

8:00 AM - 8:30 AM | GRAND BALLROOM A

## BREAKFAST & DAY TWO OPENING REMARKS

*Breakfast sponsored by Communities Foundation of Texas*

### SPEAKER

**Carol Pierce Goglia**, Senior Director of Marketing & Communications, Communities Foundation of Texas

# AGENDA

8:30 AM - 9:30 AM | GRAND BALLROOM A

## PLENARY SESSION

Internal Collaboration for Greater Impact

### PANELISTS

**Tim Bresnahan**, Senior Director of Gift Planning, The Chicago Community Trust

**Simon Delekta**, Senior Program Officer, New Hampshire Charitable Foundation

**Carol Pierce Goglia**, Senior Director of Marketing & Communications, Communities Foundation of Texas

**Carolyn Newham**, Senior Director of Donor Relations & Fund Administration, Communities Foundation of Texas

**Kristin Oliveri**, Director of Communications, New Hampshire Charitable Foundation

**Eva Penar**, Director of Marketing & Communications, The Chicago Community Trust

9:30 AM - 10:45 AM

## CONCURRENT BREAKOUTS

↳ **Impact Investing with Our CDFI | Grand Ballroom G**

### SPEAKERS

**Lisa Barr**, Director of Philanthropic Entrepreneurship, Silicon Valley Community Foundation

**Terri Lovelace**, President, LOCUS Impact Investing

**Lisa O'Mara**, VP, Donor Engagement, The Community Foundation Serving Richmond and Central Virginia

↳ **Communication Ideas that Worked | Grand Ballroom D**

### MODERATOR

**Nicole Paquette**, Marketing Manager, Communities Foundation of Texas

↳ **Re-inventing High-Impact Grantmaking: Bringing Donors, Staff & Nonprofits Together | Grand Ballroom C**

### SPEAKERS

**Carolyn Desrosiers**, Community Engagement Manager, Community Foundation for the Fox Valley Region

**Martha Hemwall**, VP, Community Engagement, Community Foundation for the Fox Valley Region

**Tammy Williams**, VP, Communications & Marketing, Community Foundation for the Fox Valley Region

↳ **The Alternative Landscape: Monetizing Complex Assets as a Growth Strategy! | Grand Ballroom E**  
*Session made possible with support from Council on Foundations*

### MODERATOR

**Bryan Del Rosario**, Staff Counsel, Council on Foundations

### SPEAKERS

**Alex Eaton**, CEO, Community Foundation of Utah

**Craig Showalter**, President & CEO, Wyoming Community Foundation

↳ **Aligning Community Leadership with Foundation Strategy: Damn, This is Hard | Grand Ballroom A**

### PANELISTS

**Steve Alley**, Managing Partner, Ekstrom Alley Clontz & Associates

**Tony Macklin, CAP**, Associate, Ekstrom Alley Clontz & Associates

**Richard Peck, CAP, CFP, ChFC**, VP of Development & Philanthropy Services, New Hampshire Charitable Foundation

**Sandi Vidal**, VP of Community Strategies & Initiatives, Central Florida Foundation

10:45 AM - 11:15 AM | EXHIBIT HALL, GRAND BALLROOM F

## NETWORKING BREAK

*Sponsored by National Center for Family Philanthropy (NCFP)*

11:15 AM - 12:30 PM

## CONCURRENT BREAKOUTS

↳ **Building Your Team: Engaging Advisors and Their Clients | Grand Ballroom G**

### PANELISTS

**David DeFiandra**, Partner, Leech Tishman Fuscaldo Lampl

**Kate McKenzie**, Assistant Director of Development, The Pittsburgh Foundation

**Peter Strope, CAP, CFP**, Managing Director, Wealth Management, UBS

**Jennie Zioncheck, MFT, CAP**, Director of Development, The Pittsburgh Foundation

↳ **Engaging Tomorrow's Philanthropists Today | Grand Ballroom D**

### SPEAKERS

**Erin Dreiling**, Marketing & Communications Manager, Community Foundation for Greater Atlanta

**Elyse Hammett**, VP, Marketing & Communications, Community Foundation for Greater Atlanta

**James Tobias**, Gift Planning Officer, Community Foundation for Greater Atlanta

↳ **Tales Gone Wrong | Grand Ballroom C**

### SPEAKERS

**Kelly Anoe**, Vice President, Legacy Foundation

**Caroline Rakar**, Program Officer, Coastal Community Foundation

↳ **The Communications Capacity Conundrum: Creative Solutions | Grand Ballroom E**

### SPEAKER

**Robin Miner-Swartz**, Owner, Miner-Swartz Editing and Consulting

12:30 PM - 2:00 PM | GRAND BALLROOM A

## LUNCH

*Sponsored by Bromelkamp Company LLC*

12:30 PM - 2:00 PM | GRAND BALLROOM A

## LUNCH KEYNOTE

**The Loyalty Switch: How to Make Anyone Loyal to You, Your Organization, or Your Cause**

*Sponsored by Network for Good*

### INTRODUCTION

**Brian Lauterbach, CFRE**, VP of Programs, Impact & Sustainability, Network for Good

### SPEAKER

**James Kane**, Speaker, Author, Researcher

# AGENDA

2:00 PM – 3:15 PM

## CONCURRENT BREAKOUTS

↳ **Doing More with Family Foundations | Grand Ballroom C**

### SPEAKERS

**Phillip Lanham, CAP**, VP, Donor & Private Foundation Services, The Greater Cincinnati Foundation  
**Ba Zan Lin**, Program Officer, Community Foundation for Greater Buffalo

↳ **Collaboration for Collective Impact | Grand Ballroom D**

### SPEAKERS

**Bob Eichinger**, Director of Donor Services, The Chicago Community Trust  
**Brian Lauterbach, CFRE**, VP of Programs, Impact & Sustainability, Network for Good  
**Courtney Vletas**, Director of Development & Donor Services, Community Foundation of Abilene

↳ **Round Table Discussions | Grand Ballroom A**

### MODERATOR

**Martha Hemwall**, VP, Community Engagement, Community Foundation for the Fox Valley Region

■ **Community Foundations as a Community Convener**

FACILITATORS

Ollie Wilder  
Diego Zegarra

■ **Anniversary Celebrations**

FACILITATOR

Tom Linfield

■ **Giving Circles**

FACILITATOR

Joanne Cohen

■ **Rural or Affiliate Work**

FACILITATOR

Trudy Hughes

■ **Scholarships**

FACILITATOR

Caroline Rakar

■ **Technology**

FACILITATOR

Shannon Oakes

↳ **Trends and Challenges in the Community Foundation World | Grand Ballroom E**

*Session made possible with support from Council on Foundations*

### MODERATOR

**Eric Hozempa**, Executive Director, Longmont Community Foundation

### SPEAKERS

**Jason Franklin**, Kellogg Community Philanthropy Chair, Johnson Center for Philanthropy

**Brad Ward**, Director of Community Philanthropy, Council on Foundations

3:15 PM - 4:15 PM | GRAND BALLROOM A

## PLENARY SESSION

The Role of Community Foundations When Mass Violence Hits Home

### INTRODUCTION

**Eric Hozempa**, Executive Director, Longmont Community Foundation

### SPEAKERS

**Jennifer Barahona, LCSW**, Executive Director, Newtown-Sandy Hook Community Foundation

**Gian F. Brosco, Esq.**, President, Nevada Community Foundation

**Sandi Vidal**, VP of Community Strategies & Initiatives, Central Florida Foundation

4:15 PM - 4:30 PM | GRAND BALLROOM A

## CLOSING REMARKS

### SPEAKER

**Martha Hemwall**, VP, Community Engagement, Community Foundation for the Fox Valley Region

## Wednesday, March 21

8:00 AM - 11:30 AM | GRAND BALLROOM FOYER | REGISTRATION DESK 1

## REGISTRATION DESK OPEN

8:00 AM - 10:30 AM | GRAND BALLROOM F

## EXHIBIT HALL

8:00 AM - 9:15 AM

## BREAKFAST & AFFINITY GROUP MEETINGS

*Breakfast Buffet will be located Grand Ballroom Foyer*

**AdNet Business Meeting: Grand Ballroom G**

**CommA Business Meeting: Grand Ballroom D**

**ProNet Business Meeting: Grand Ballroom E**

9:15 AM - 10:30 AM

## CONCURRENT BREAKOUTS

↳ **Giving Circles: Spinning Gold or Chasing Your Tail | Grand Ballroom G**

### SPEAKER

**Joanne Cohen**, VP of Philanthropic Services, The Community Foundation for Northeast Florida

↳ **So, You're Celebrating an Anniversary? | Grand Ballroom C**

### SPEAKERS

**David Koehler**, VP of Donor Engagement, Madison Community Foundation

**Tom Linfield**, VP, Community Impact, Madison Community Foundation

**Brennan Nardi**, Director of Communications, Madison Community Foundation



# AGENDA

## ↳ Unrestricted Funding, What's Holding Philanthropy Back? | Grand Ballroom D

### SPEAKERS

**Ophelia Bitanga-Isreal**, Program Officer, Hawaii Community Foundation

**Simon Delekta**, Senior Program Officer, New Hampshire Charitable Foundation

**Priscilla Enriquez**, Chief Strategy & Impact Officer, Sacramento Region Community Foundation

**Erika Frank**, Community Investments Officer, Hartford Foundation for Public Giving

## ↳ What's Happening in Washington: Legislative Updates & Field-Wide Efforts | Grand Ballroom E

### SPEAKERS

**Jeff Hamond**, Vice President, Van Scoyoc Associates

**Peter Panepento**, Philanthropic Practice Leader, Turn Two Communications

10:30 AM - 11:30 AM | GRAND BALLROOM A

## PLENARY SESSION

**Changing Trends in Community Philanthropy: Adapting & Growing Amid Changing Giving Pattern**

### SPEAKER

**Jason Franklin**, Kellogg Community Philanthropy Chair, Johnson Center for Philanthropy

11:30 AM | GRAND BALLROOM A

## CLOSING REMARKS

### CFUNITED CONFERENCE COMMITTEE

**Carol Pierce Goglia**, Senior Director of Marketing & Communications, Communities Foundation of Texas

**Eric Hozempa**, Executive Director, Longmont Community Foundation

**Jackie Mahoney**, Executive VP, Community Foundation for the Greater Capital Region

**Nicole Paquette**, Marketing Manager, Communities Foundation of Texas

**Jodi Spataro**, Chief Advancement Officer, Community Foundation of Elkhart County

11:30 AM | GRAND BALLROOM FOYER

## BOXED LUNCH