



## 2023 PACFA CONFERENCE: LEADING TOGETHER

The Penn Stater Hotel and Conference Center  
215 Innovation Boulevard, State College, PA 16803

September 26<sup>th</sup>-27<sup>th</sup>, 2023

### AGENDA OVERVIEW (As of August 4, 2023)

#### Tuesday, September 26, 2023

1:00-4:00 p.m.	Optional Pre-Conference Sessions Foundant - Conference Center AkoyaGo - Conference Center Community Leadership Deep Dive @ Three Dots Downtown
1:00-4:00 p.m.	Check In
5:00 p.m.	Reception
6:00-7.30 p.m.	Dinner with Keynote Speaker Mary Thomas, CEO of CFLeads

#### Wednesday, September 27<sup>th</sup>, 2023

7:45 a.m.	Continental Breakfast - 2 <sup>nd</sup> Floor Break Area
8:45-9:15 a.m.	PACFA Annual Report to Membership with Phil Koch, Chair and Michael Batchelor, President - Room 208
9:30-10:45 a.m.	Session One
10:45-11:00 a.m.	Break - 2 <sup>nd</sup> Floor Break Area
11:00-12:15 p.m.	Session Two
12:20-1:30 p.m.	Keynote Lunch - Dean's Hall
1:30-2:45 p.m.	Roundtable Discussions
2:45-4:00 p.m.	Session Three
4:00-5.00 p.m.	Closing/Wrap Up - Room 208
6:00 p.m.	Meeting of PACFA Board

## AGENDA DETAIL

(As of August 8, 2023)

### Tuesday, September 26, 2023

- 1:00–4:00 p.m.      Optional Pre-Conference Sessions
- 4:00 p.m.            Check In
- 5:00 p.m.            Reception
- 6:00–7:30 p.m.      Keynote Dinner

Mary Thomas, CEO CFLeads. Mary Thomas knows that there is incredible momentum in the community foundation field to do more community leadership. With over 25 years of experience in the community foundation field, Mary is adept at amplifying community voice through grassroots leadership training and is a tireless advocate for racial equity. As the President & CEO of CFLeads, Mary is using her skills as a dynamic leader, connector and relationship-builder to identify opportunities, develop strategies and implement initiatives that will help strengthen community foundations' capacity to do more community leadership. She previously served as the Chief Operating Officer of The Spartanburg County Foundation and as the Executive Director of the Robert Hett Chapman III Center for Philanthropy.

### Wednesday, September 27, 2022

- 7:45–8:45 a.m.      Continental Breakfast - 2<sup>nd</sup> Floor Breakfast Area
- 8:45–9:15 a.m.      PACFA Annual Meeting and Report to Membership with  
Phil Koch, Chair and Michael Batchelor, President - Room 208
- 9:30-10:45 a.m.      Concurrent Session One

Session	Presenter(s)
"Evergreen Funds", a Better Way to Manage the "Messy" World of Private Equity Investments	Will Thorpe, <i>Chief Marketing and Development Officer</i> , Mason Investments
All Kids Should Have an Equal Opportunity to Learn, No Matter the Zip Code	Dr. Myra Forrest, <i>Education Advocate</i> , Pottstown Area Health and Wellness Foundation
Best Practice for Engaging Professional Advisors	Franki Aitken, <i>Chief Operating Officer</i> , Berks County Community Foundation  Jason Arbacheski, <i>Director of Gift Planning and Stewardship</i> , Chester County Community  Monika Collins, <i>Vice President for Advancement and Philanthropic Services</i> , Foundation for Delaware County

10:45-11:00 a.m. Break and Refreshments - 2<sup>nd</sup> Floor Break Area

11:00-12:15 p.m. Concurrent Session Two

Session	Presenter(s)
The Erie Playbook, Driving Equitable Change	Karen Bilowith, <i>CEO</i> , The Erie Community Foundation, Kim Thomas, <i>Executive Director</i> , Infinite Erie
Strategy in a Fast-Changing World	Emmie Calland, <i>Director of Strategic Projects &amp; Foundation Initiatives</i> , The Pittsburgh Foundation  Trenton Moulin, <i>President and CEO</i> , Bridgebuilders Community Foundation  Mike Kane, <i>President and Executive Director</i> , Community Foundation for the Alleghenies
When Disaster Strikes, Will Your Plan Work?	Heidi Williamson, <i>Chief Strategy Officer</i> , Berks County Community Foundation  Kevin Murphy, <i>President</i> , Berk County Community Foundation

12:20-1:30 p.m. Keynote Lunch - Dean's Hall

Donna Cooper, Executive Director, Children First. Prior to Children First, Donna was a senior fellow at the respected national think tank, the Center for American Progress, where she led the Center's research on early childhood education, public infrastructure, and was a contributing researcher to the Center's work to reduce the incidence of poverty. She served as the Secretary of Policy and Planning for the Commonwealth of Pennsylvania from 2003-2010. Donna led the development of the state's Cover All Kids program which expanded access to affordable health care to nearly every child in the state. Donna also led the seven-year effort to boost funding for public education that increased K-12 funding by over \$2 billion, and designed the state's groundbreaking school funding formula which was enacted in 2008.

1:30-2:45 p.m. Roundtable Presentations

Session	Presenters
Community Leadership through Equity Centered Capacity Building	Megan Briggs, <i>Vice President of Community Investments</i> , Lehigh Valley Community Foundation
Leveraging Partnerships in Rural Communities	Ryanne Jennings, <i>President and CEO</i> , Wayne County Community Foundation  Derek Williams, <i>Community Grant Writer</i> , Wayne County Community Foundation

Diversity, Equity and Inclusion	<p>Adrian Buckner, <i>Vice President of Grants and Community Engagement</i>, York County Foundation</p> <p>Rabiya Khan, Communications Coordinator, York County Foundation</p>
Setting a Community Leadership Agenda	Jennifer Wilson, <i>CEO</i> , First Community Foundation Partnership
Benefits Cliff	Phil Koch, <i>Vice President of Policy and Community Impact</i> , The Pittsburgh Foundation
Hot Topics	Open Table for Participants to talk about Hot Topics of the Day
Hot Topics	Open Table for Participants to talk about Hot Topics of the Day

2:45-4:00 p.m. Concurrent Session Three

Session	Presenter(s)
Creating, Implementing, Evaluating and Funding your Marketing Plan	<p>Natalie Kurchak, <i>Communications Officer</i>, Community Foundation for the Alleghenies</p> <p>Sarah J. Thomas, <i>Vice President of Communications &amp; Culture</i>, York Foundation</p> <p>TBD</p> <p>Moderator, Ted Qualli Director of Communications and Marketing, The Philadelphia Foundation</p>
Fiscal Sponsorships as a Tool for Equity and Empowerment	Damion Wilson, <i>Program Officer</i> , Poise Foundation
Youth Engagement Affinity Group Strategies	<p>Janice R. Black, <i>President and CEO</i>, The Foundation for Enhancing Communities</p> <p>Jennifer Doyle, <i>Vice President for Philanthropy and Community Engagement</i>, The Foundation for Enhancing Communities</p> <p>Brooke Clark, <i>Philanthropic Officer</i>, The Foundation for Enhancing Communities</p>

4:00-5:00 p.m. Closing and Wrap Up - What can PACFA do together? -  
Room 208

6:00 p.m. Meeting for PACFA Board Members