



2024 CONFERENCE: Navigating Changes to Create Opportunity

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

September 24-25, 2024

Registration Fee

Early Bird - \$350

Regular - \$375

Purchase tickets at pacfapartners.org/conference

Sponsored by Foundant, AkoyaGo, FEG, Cornerstone, Mason Investments, PNC

AGENDA OVERVIEW

Tuesday, September 24, 2024

9:00 a.m.	Conference Check-In Begins
9:30-11:30 a.m.	Optional Pre-Conference Sessions <i>(separate registration required)</i> Foundant - Conference Center AkoyaGo - Conference Center
12:00-1:30 p.m.	Conference Kickoff Luncheon: "If I only knew then what I know now" <i>with keynote panelists Dianna Sieger, Alex Holtel, Monica Merante and Michael Batchelor</i>
1:45-2:45 p.m.	Opening <i>featuring Jess King with the Steinman Institute for Civic Engagement</i>
3:00-4:00 p.m.	Meet Your Peers Small Groups Networking Session
4:00 p.m.	Hotel Check-In Begins

5:30-7:00 p.m.

Welcome Reception
sponsored by AkoyaGo

7:00 p.m.

Dinner
*with keynote Isaiah Oliver with the Community Foundation of
Northeast Florida and CFLeads*

Wednesday, September 25, 2024

7:45 a.m.

Continental Breakfast

8:15 - 9:15 a.m.

Opening Session
featuring Dr. Stephanie Gripne with the Impact Finance Center

9:15 - 9:30 a.m.

PACFA Annual Report to Membership
with Board Chair Phil Koch and President Michael Batchelor

9:30-10:45 a.m.

Session One

10:45-11:00 a.m.

Break

11:00-12:15 p.m.

Session Two

12:20-1:30 p.m.

Luncheon
*with keynote Kyle Kopko, Ph.D. J.D., and Laura Dimino, Ph.D.,
of the Center for Rural Pennsylvania*

1:30-2:45 p.m.

Hot Topics

2:45-4:00 p.m.

1. Outsourced Chief Investment Officer - Is this for you and how do you choose?
2. Education Reform in Pennsylvania
3. Childcare and Economic Mobility
4. Raising Unrestricted Endowment

5:45 p.m.

Session Three

Closing/Wrap Up

Meeting of PACFA Board - American Ale House

AGENDA DETAIL

Tuesday, September 24, 2024

9:00 a.m. Conference Check-In Begins

9:30-11:30 a.m. Optional Pre-Conference Sessions (Foundant & AkoyaGo)
(separate registration required)

12:00-1:30 p.m. Conference Kickoff Luncheon: “If I only knew then what I know now”

“If I only knew then what I know now”

Our kickoff luncheon will feature a panel of field leaders with nearly 100 years of experience (Dianna Sieger, Alex Holtel, Monica Merante and Michael Batchelor)! During a facilitated discussion, they will share career lessons learned and their hopes and dreams for our field.

1:45-2:45 p.m. Opening Session

“Precursor to Community Leadership, An Engaged and Educated Public”

Our opening plenary will feature Jess King, Executive Director of the Steinman Institute for Civic Engagement.

3:00-4:00 p.m. Meet Your Peers

Connect with other PACFA members during facilitated small group discussions by functional area. Learn and share your personal lessons learned and hopes and dreams for our field.

4:00 p.m. Hotel Check-In Begins

5:30-7:00 p.m. Welcoming Reception, sponsored by AkoyaGo

7:00 p.m. Dinner

“Community Leadership in Trying Times”

Isaiah Oliver, President of the Community Foundation of Northeast Florida and current CFLeads Board Chair. Introduced by Lisa Schroeder, CEO The Pittsburgh Foundation.

Wednesday, September 25^h, 2024

- 7:45 a.m. Continental Breakfast
- 8:15-9:15 a.m. Opening Session - “Catalyzing \$1 Trillion for Good” with Dr. Stephanie Gripne, Founder of the Impact Finance Center
- 9:15-9:30 a.m. PACFA Annual Report to Membership with Board Chair Phil Koch and President Michael Batchelor
- 9:30-10:45 a.m. Concurrent Session One

Session	Presenter(s)
Trust Based Philanthropy	Michelle McMurray, Vice President of Program and Community Engagement, The Pittsburgh Foundation
Advocacy and Public Policy: Where to start, what to do and what to avoid	Phil Koch, Vice President of Public Policy, The Pittsburgh Foundation
Navigating the Hard Conversations: From Theory to Practice	Ryanne Jennings, President and CEO, Wayne County Community Foundation Maggie Martinelli, Chief Operating Officer, Scranton Area Community Foundation Laura Ducceschi, President and CEO Scranton Area Community Foundation

- 10:45-11:00 a.m. Break
- 11:00 a.m.- 12:15 p.m. Concurrent Session Two

Session	Presenter(s)
98 community foundations across 33 states. How does your shop compare?	Andrew Zach, Senior Vice President, Fund Evaluation Group
Navigating Change in the Nonprofit Sector and Beyond	<p>Jennie Zioncheck, Chief of Staff and Strategic Implementation, The Pittsburgh Foundation</p> <p>Michelle McMurray, Vice President of Program and Community Engagement, The Pittsburgh Foundation</p> <p>Emmie Calland, Director of Strategic Projects and Foundation Initiatives, The Pittsburgh Foundation</p>
Nonprofit Capacity Building: Continuum of Models	Adam Bratton, Executive Director, The Nonprofit Partnership

12:20-1:30 p.m. Luncheon

“The \$418 Billion Dollar Question Center for Rural Pennsylvania Transfer of Wealth Study and what to do with it?”

Kyle Kopko, Ph.D., J.D., Executive Director, and Laura Dimino, Ph.D., Assistant Director of the Center for Rural Pennsylvania

1:30-2:45 p.m. Hot Topics - Opportunity to network with PACFA peers and to informally discuss conference topics or other current priority issues.

Hot Topic	Facilitator(s)
<p align="center">Outsourced Chief Investment Officer - Is this for you and how do you choose?</p>	<p align="center">Claudelle Géhy, CFA, Senior Investment Consultant & Director of ESG Research</p>
<p align="center">Education Reform in Pennsylvania</p>	<p align="center">Myra Forrest, Education Advocate, Pottstown Area Health and Wellness Foundation</p>
<p align="center">Childcare and Economic Mobility</p>	<p align="center">Angie Berzonski, Associate Director, Community Foundation for the Alleghenies</p> <p align="center">Mishelle Beith, Development Manager, Bridge Builders Community Foundation</p> <p align="center">Megan Briggs, Director of Community Investments, Lehigh Valley Community Foundation</p>
<p align="center">Raising Unrestricted Endowment</p>	<p align="center">Ralph Serpe, President and CEO, Adams County Community Foundation</p>

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

Session	Presenter(s)
<p align="center">Collective Philanthropy: Building a Culture of Giving by Engaging and Empowering People.</p>	<p align="center">Laura Ducceschi, President and CEO, Scranton Area Community Foundation,</p> <p align="center">Olivia Burgess, Philanthropic Service Officer, Erie Community Foundation,</p> <p align="center">Dave Pedri, President and CEO, Luzerne Foundation</p> <p align="center">Kara Seesholtz, President and CEO, Community Giving Foundation</p>

<p>Financial Story Telling</p>	<p>Rebecca W. Jacklin, Senior Vice President, Director, National Strategy, PNC Bank</p> <p>Doug Berman, Partner, RKL and RKL Not-for Profit Industry Group Leader</p>
<p>It's a whole new world: AI in philanthropy</p>	<p>Nittany AI Alliance</p>

4:00-5:00 p.m. Closing/Wrap Up

5:45 p.m. Meeting of PACFA Board - American Ale House