

KEY: GEN: General Topic for all attendees MKTG: Marketing Related Topic CI: Community Impact

RD: Resource Development GV: Governance HR: Human Resource PP: Public Policy INN: Innovative Partnership *\*NOTE\* The agenda and workshops below are subject to change.*

Shape

**Wednesday July 17, 2019**

10am-11:30am **MAC Membership Advisory Committee Meeting, All CPOs Only**

Annual Face-To-Face MAC Meeting; Strategic Plan Update and Public Policy Work Session with BJ Costello and Janet Silver from Hinman-Straub

12:00-1:00 Optional Lunch on your own

1:15 **Kick Off** the Conference, (GEN) Opening Remarks from UWNYS, Welcome from Host Michael Weiner, CEO of United Way of Buffalo and Erie County and Darley Willis former Board Member United Way of Buffalo and Erie County; Board Member United Way of New York State

Afternoon Snack SPONSORED BY; [CSEA NYS LOCAL 1,000](https://cseany.org/)

1:30-2:30 **WORKSHOP 1**: **Making the 2020 Census Count for Every New Yorker** (INN, PP)

Presented by: Sheena Wright, President and CEO United Way of New York City; Patricia Swann, Senior Program Officer at the New York Community Trust; Steve Choi, Executive Director, New York Immigration Coalition

A fair and accurate count of all New Yorkers in the 2020 Census is essential to securing federal funding and congressional representation. The 2020 Census poses unique challenges, including an unresolved question about citizenship, insufficient funding, and potential barriers with online responses. Collaborative approaches are necessary to address these complex issues. Join the United Way of New York City (UWNYC) and leaders of statewide coalitions—the New York State Census Equity Fund and New York Counts 2020—to understand how funders, nonprofits, government, and private sector partners can align efforts to support a fair and accurate count. As a backbone organization, UWNYC convenes organizations, aligns strategies and resources, supports network activities, mobilizes community-based organizations, and leverages corporate partnerships to support Census 2020 activities. United Ways across the state have numerous opportunities to develop their own action plans or join efforts in this important work.

Top 2-3 Take Aways that attendees will gain

1. Clear understanding of both the importance of and challenges facing the 2020 census.
2. Vision for how a United Way could participate and align on census efforts, understand the key players and what it takes to do this collectively.
3. Potential mobilization and engagement opportunities for United Ways to get involved.

2:30-3:30 **WORKSHOP 2**: **Community Impact Revenue Generation Innovations** (INN, CI, RD)

Presented by: Panel of Local United Ways including Melissa Clark, Director of Community Impact, United Way of the Dutchess-Orange Region; Jacqueline Gerchman, Executive Director, United Way of Broome County and Peter Gannon, CEO United Way of the Greater Capital Region

United Way of the Dutchess-Orange Region hosts a high impact basic needs program, which provides items to families in crisis. Many of these families are transitioning out of shelter and in need of items for permanent housing. Quarterly, UWDOR opens its doors, inviting hundreds of nonprofits into our “free store” to take items for the families that they serve. The items that we offer to families are new as a result of corporate retail partnerships and include household items such as clothing, hygiene items and children’s items.

CI and RD have worked together to greatly expand and enhance this program, securing 100k in NYS building renovation dollars, as well as another 100k in private donor dollars to bring this program to the next level. This program is customizable to the unique needs of your community and has been named a best practice by United Way Worldwide. The workshop features a panel of best practices pairing Community Impact with Resource Development.

Top 2-3 Take Aways that attendees will gain

1. Effectively bridging Community Impact /Resource Development initiatives
2. Leveraging basic needs initiatives for major funding
3. Setting up a customizable Day of Sharing program

3:30-4:30 **WORKSHOP 3**: **The Fund-Raising Effectiveness Project and Your Donor Pipeline: Strategies to Engage and Retain Donors Throughout Their Lifespan** (GEN, RD)

Presented Elizebeth Fallon Quilter, CFRE Non-Profit Strategist, Coach, Trainer and Fund-Raising Consultant and Meghann Sandak, Chief Development Officer, United Way of Central NY.

The Fundraising Effectiveness Project (FEP) offers free tools and contemporary research to help your United Way increase donor retention and upgrades. In this workshop you will discover key “aha!s” from the FEP and how to access and optimize the free tools. This interactive, lively session will give you practical, actionable options to take back to your United Way to use immediately as well as in your planning for upcoming years. It will help you consider data-driven decision making and best practices to prioritize your activities and budgeting. We will use examples from a local United Way And consider Brene Brown’s adage: stories are data with a soul. Your results will encourage you, your staff, your board and your community!

Top 2-3 Take Aways that attendees will gain

1. Free Resources to use immediately to help retain and engage donors
2. Up-to-the-moment statistics on donor behavior that will help you prioritize action
3. How to incorporate metrics for data-driven decision making

6:00PM **Optional Networking/Social Activity organized by UWBEC or Dinner On Your Own in the City**

**Thursday, July 18th**

7:00 Breakfast (cook to order, included in your hotel accommodation)

7:45-8:15 **Welcome and State of** [**United Way of New York State**](https://uwnys.org/) **(**GEN)

Presented by Brenda Episcopo, President and CEO of United Way of New York State and Mary Shaheen, President of 2-1-1 New York and Vice-President of United Way of New York State

8:15-9:15: **Opening Interactive Keynote (GEN) The Art & Science of Human Communication**

Presented by [Matt Episcopo, Speaker, Author, Coach](https://mattepiscopo.com/)

Ever wish you could read people’s minds? Figure out what others are thinking, feeling and going to do next. It’s time to learn the secrets to accurately identify and decode non-verbal behavior.

Through gaining this insight, you can uncover pertinent information regarding an individual’s thought process and inner feelings. Furthermore, empowering you to be more effective and tactful regarding your interactions, giving you the advantage.

You can also take more control over your own non-verbal messages through being more self-aware. These skills have proven extremely valuable during negotiations, business meetings, interviews and more.

  Top 2-3 Take Aways that attendees will gain

1. Learn how to decode the body’s clues that tell you important information that is often overlooked.
2. Use communication strategies to adapt your approach and timing for maximizing your impact.
3. Create an effective Communication Feedback loop.

9:15-9:30 Break/Transition Presenters

9:30-10:30 **Break Out Session 1:**

* 1. **5X25: Advancing Education Equity With the Business Community** (INN, PP)

Presented by Leah Kabran Eden, Policy Specialist, United Way of New York City

United Ways can play a leading role in ensuring all students are prepared for college, careers, and active citizenship, which is essential for a competitive workforce. In schools across New York, students—particularly students of color and those who are low-income—are often denied opportunities to experience rigorous instruction. The United Way of New York City (UWNYC) is an active member of The New York Equity Coalition, a group of civil rights, education, parent, and business organizations committed to fighting for higher achievement and greater opportunities for all students in New York. As an active participant of this advocacy coalition, UWNYC has amplified the voices of our parents, school leaders, community-based organizations, business leaders and the public. Discussion will include what it means to be an active part of an advocacy coalition, especially one that works to align efforts of the business and education sectors. United Ways across the state have an opportunity to join these efforts and can play a unique role of engaging business and education stakeholders in a meaningful way.

Top 2-3 Take Aways that attendees will gain

1. Clear understanding of how the education systems denies students of color access to rigorous coursework and the impact for those working in the education sector and the business sector.
2. Vision for how a United Way could participate in an advocacy campaign and engage the business community.
3. Potential mobilization and engagement opportunities for United Ways to get involved.
   1. **5 Steps to a Safer Online Life** (GEN)

Presented by Carolyn Munoz, Cyber Crime Support Network

As our lives become more and more connected to digital devices, we need to understand simple, effective tools to keep our data, money and families safe. Using widely accepted best practices, this presentation will allow you to improve the security of your accounts easily and for little to no cost. Cybersecurity education and awareness is for everyone and it can be easy to understand.

Top 2-3 Take Aways that attendees will gain

1. Attendees will be able to identify the key threats facing their online accounts.
2. Attendees will be able to identify 5 steps to better understand cybersecurity.
3. Attendees will know how to change their behavior and improve their online security.

10:30 Break Sponsored by [Bonadio Group](https://www.bonadio.com/)

10:45- 11:45 **WORKSHOP 4**: **Re-Energizing Our Corporate Partnerships: Driving Engagement and Results Through Leadership Development** (INN, RD, GEN)

Presented by Jennifer Owen, April Lucey, Account Executives with United Way of Buffalo and Erie County, Panel of Presenters from: GEICO, M&T Bank, Wegmans

Join us for an in-depth look at the Corporate Loaned Executive Program, the cornerstone of United Way of Buffalo & Erie County’s most successful philanthropic partnerships.

The United Way of Buffalo & Erie County's Corporate Loaned Executive (LE) Program is a collaboration between United Way and local companies from a variety of industries, designed to provide teams of emerging leaders with professional development, team building, and year-round engagement opportunities while also increasing their insight into work of the United Way.

Presenters will be joined by a panel of representatives from UWBEC’s top campaign teams, including GEICO, M&T Bank, and Wegmans, who will share the best practices that guide their success and ensure United Way remains relevant and competitive in the workplace.

Top 2-3 Take Aways that attendees will gain

1. Target key companies for mutually beneficial collaboration using year-round engagement strategies.
2. Extend United Way's reach by building a new generation of rising corporate leaders who are empowered to deliver the message of United Way.
3. Reinforce United Way's role in the workplace as a partner-of-choice for employee engagement, community impact, and business value.

**12:00-1:00 Lunch and Break Sponsored By** [**Hinman Straub**](https://hinmanstraub.com/)

Tables Designated by Topic Area for Discussion, with conversation starters, to further networking and small group learning.

1:00-2:00 **Break out session 2:**

* 1. **Work Force Development: the State of the Workforce Report** (INN, CI)

Presented by Megan Farry, Director of Strategic Partnerships, New York Association of Training and Employment Professionals (NYATEP)

An overview of our annual New York’s State of the Workforce Report which provides data on employment numbers, what sectors and occupations are growing and the number of workers produced by the education and training systems.

Top 2-3 Take Aways that attendees will gain

1. A broad overview of the trends and data regarding New York’s labor market
2. Potential growth opportunities for workforce programming
   1. **Not For Profit Financial Reporting and Internal Controls** (GEN, GOV)

Presented by Jason Mayausky, CPA and Justin Bentley, CPA Allied Financial Partners \* (Conference Sponsor)

A discussion of the financial reporting and governance implications of new accounting standards recently issued specifically for not-for-profit entities (Accounting Standards Update 2016-14), effective for December 31, 2018 and subsequent year ends. The standard changes the financial reporting requirements surrounding donor-restricted funds, endowments and functional expenses as well as expands upon disclosure requirements regarding the organization’s liquidity and availability of resources. In addition, the presenters will discuss internal controls over financial reporting and best practices.

Top 2-3 Take Aways that attendees will gain

1. Financial statement compliance with standards
2. Liquidity and Resources disclosures – what donor’s may be looking for
3. Internal control suggestions and best practices

**2:00-2:15 Break/Transition**

2:15-3:15 **Break out session 3:**

* 1. **Using ALICE to Support Expanding New York’s Tax Credits Would Help Children and Young Adults** (INN, CI, PP)

Presented by Ron Deutsch, Executive Director, Fiscal Policy Institute; Dorothy Hill, Director of Policy, Schuyler Center for Analysis and Advocacy; Pete Nabozny, Director of Policy, The Children’s Agenda

New York’s children and families continue to struggle despite steady economic growth across New York State. Twenty-one percent of New York children live in poverty and 40% live in households with income less than 200% of poverty. This workshop will explore how expanding the Empire State Child Credit to cover the youngest New Yorkers, and doubling the credit for these young children, and increasing the state EITC for working New Yorkers with children, would yield tangible and significant benefits in all aspects of the lives of these New Yorkers. Research suggests that expanding the State’s EITC to cover young adults would reduce poverty among this group and increase workforce engagement. The [ALICE (Asset Limited Income Constrained Employed) report](https://www.unitedwayalice.org/new-york) published by United Way illustrates that there are only approximately 188,000 households comprised of young and childless adults (under 25) in New York, 42 percent of them live in poverty and 29 percent are ALICE.

Top 2-3 Take Aways that attendees will gain

1. Why working family tax credits are sound public policy to lift families out of poverty
2. Why FPL is antiquated and why ALICE is a better measure to evaluate self-sufficiency
3. Mechanics of expanding the tax credits and fiscal impacts
   1. **Beyond Collaboration: Merger and Affiliation Trends In New York State and Local United Ways**

Presented by Doug Sauer, CEO, New York Council On Non-Profits (NYCON) (GEN, GV) and Panel of LUWs: Connie Brown, Executive Director, United Way of Greater Niagara; Erin Gutierrez Matt, CEO, United Way of the Valley & Greater Utica Area

This interactive session will provide an overview of the nonprofit landscape in NYS that is stimulating increased interest in shared services, affiliations, and mergers. The benefits and challenges associated with the various restructuring models and the creative variations that are taking place will be also be discussed including the role and impact on philanthropy and United Ways.

Top 2-3 Take Aways that attendees will gain

1. Understanding the landscape changing trends
2. General & technical knowledge of restructuring options
3. Role and impact on UWs and donors

**3:15 Break and Afternoon Snack Sponsored by** [**IBEW NY**](http://www.ibew.org/3rddistrict)

3:30-4:30 **Break out Session 4:**

A. **Work/Life Solutions: Supporting ALICE in the Workplace** (INN, CI)

Presented by Laura Caley, Work/Life Solutions Project Director; Joe Roccisano, Director of Fiscal Stability and THRIVE Buffalo; Mary Teresa Galante, Work/Life Solutions Resource Coordinator from United Way Buffalo and Erie County and Kathleen Rizzo Young, Manager of Public & Community Relations for Evans Bank.

Work/Life Solutions (W/LS) of UWBEC is an innovative program offered by local employers in the workplace as an employee benefit. Through this workshop we will share the story of how and why Work/Life Solutions came to be, best practices established, successes, and lessons learned. This program was recognized with the 2019 (Alliance for Information and Referral Services) AIRS Innovation Award.

The goal of W/LS is to improve workplace productivity, retention, attendance, financial stability and well-being for employees. The program was built based on proven program models elsewhere in the country and seeks to help employees overcome non-work-related issues attributed to decreased job performance and workplace attrition through a set of three on-site solutions:

Top 2-3 Take Aways that attendees will gain

1. What is Work/Life Solutions (and other program models), how does it work to support the ALICE population, why would a corporation fund a program like this over a multi-year period.
2. Best practices, what it takes and what we learned, how we stood the program up in Erie County.
3. How workforce support programs offered in the workplace align with United Way missions.

B. **Shared Purpose and Donor Engagement: Re-imagining Our Value** (GEN, RD)

Presented by Molly Pieroni, Business Development Specialist, Digital Team, United Way Worldwide

Join us for a lively discussion about the megatrends in the market and how we can best position our messaging. Learn how to take advantage of platforms like Salesforce Philanthropy Cloud to share your stories with donors. Explore Shared Purpose and what it means for your United Way. Hear stories about United Ways who are unlocking value in their relationships with donors and companies.

Top 2-3 Take Aways that attendees will gain

1. Update New York United Way team members on UWW initiatives in Digital Services and Salesforce Philanthropy Cloud
2. Discuss the concept of Shared Purpose and what it means for United Ways’ positioning to corporate partners
3. Share examples of results achieved with Digital Services and Salesforce Philanthropy Cloud

**4:30 Break**

5:00-6:00 Cocktail Reception **SPONSORED BY** [**ALLIED FINANCIAL PARTNERS**](https://alliedfp.com/)

6:00-8:00 **Dinner, Featuring Keynote Address: United Way Worldwide (GEN) United Way 2020, The Big Vision and How Do We Get There Presented by: Tina MacVeigh, SVP, Network Strategy United Way Worldwide SPONSORED BY** [**Cureo**](https://cureo.com/united-way-of-nys/)

**Friday, July 19th:**

7:00-8:00 Breakfast (cook to order, included in your accommodation)

8:00-9:00 **WORKSHOP 5:** **Speed Networking to Drive Results** (GEN)

Facilitated by Brenda Episcopo, President and CEO of UWNYS

With Assistance from Conference Planning Team Members

Back by popular demand--- join your peers in a round-robin, rapid fire exchange of the most relevant and current information. Quickly learn dozens of ideas from your peers in this facilitated speed networking session-rated among the top 2 favorite sessions from the 2018 conference!

9:00-9:15 Break/Transition

9:15-10:15 **WORKSHOP 6: 2-1-1 Here When You Need It** (GEN, CI, 211)

Presented by Mary Shaheen, President, 2-1-1 New York, Vice-President, United Way of New York State, Candace Gregory, 2-1-1 Director, United Way of Broome County/2-1-1 Susquehanna River Region and Kelly Dodd, Director of Contact Center Services, Olmsted Center for Sight/2-1-1 Western NY.

Begun as a single, easy-to-remember number to call for information on and referral to non-emergency health and human services, 2-1-1 has evolved to become a versatile asset that is available to United Ways, community partners and residents across NYS, 24/7/365. This workshop will highlight just a few of current 2-1-1 innovations and assets that are available and could be assisting your community too.

Key take-aways:

1. Familiarity with 2-1-1 Counts and how to access the various data sets to help inform local outreach, investment and planning efforts.
2. Innovative uses for 2-1-1.
3. Opportunities to engage with 2-1-1 in new ways to support UW efforts.

10:15-10:30 Break/Refreshments SPONSORED BY [NBT BANK](https://www.nbtbank.com/personal)

10:30-11:30 **WORKSHOP 7: ALICE 2020: A Look at the ALICE 2020 Update Innovations and Options!**

Presented by Brenda Episcopo, President and CEO of United Way of New York State and Mary Shaheen, President of 2-1-1 New York and Vice-President of United Way of New York State

Our next report, ALICE 2020 is slated for development in the Fall of 2019. Let’s review our options for the research and learn about cutting edge add-ons that have been developed by the National ALICE Team! Give your input, while we develop our offering to the network.

Top 2-3 Take Aways that attendees will gain

1. Learn what new data is available for our ALICE 2020 Report
2. Explore cutting edge tools, for use with the ALICE data, and give your voice to what is most relevant to you
3. Learn an easy to implement ALICE simulation

11:30-12:00 **Facilitated Network Debrief**: this session will capture major lessons learned and assist attendees in developing an implementation plan for their return to their United Way. (GEN)

Facilitated by Kathy Snow, Director of Development, United Way of the Adirondack Region, Inc.

12:00 Conference Closes

**Special Thanks to the 2019 Conference Planning Committee:**

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