UWNYS Annual Conference Proposed Schedule v 3

(This conference has been approved by UWW for use of Flexible Credits)

**Tuesday, July 14th**

**Optional Preconference- 12:30-4:30** Policy & Procedures Desk book, by Jenny Palazio and Ken Euwema, UWW

Managing risk is a cross-functional effort. But where to begin?

Policies are frequently the starting point for any organization to articulate to employees, the board and to other stakeholders how they will operate, how decisions will be made, and permitted/prohibited activities. The morning will focus on policies in general and what goes into making great policies that serve as "guardrails" for the organization. We’ll also review the organizational policies where the board must weigh in.

The afternoon will focus on guidance from the Policy Deskbook, recently launched on United Way Online, which addresses primarily financial and operational matters.

**5-7:30**

Speed Networking, facilitated

Cocktail Reception with heavy food, informal networking

**8:00**- Informal gathering at Tru: Lobby/Game Area/Fire Pit

**Wednesday, July 15th:**

**9-10** UWW Modern UW Keynote

Break 10-10:15

**10:15-11:15** UWW System Transformations- tools and discussions

**11:15-11:45** Speed Networking

**11:45-1:00** Lunch and UWNYS Updates: Public Policy, 211 ALICE

**1-4:15**: Break Out Sessopms: 1-2:30; 2:30-2:45 Break; 2:45-4:15

A: Resource Development Best Practices

B: Community Impact: Best Practices

**4-5:** Break

**5**- Cocktails and Dinner-

Thursday, July 16th:

**9-10:** ALICE 2020 Overview, Data Trends/Review, Interactive Website Demo; Sharing ideas on UW use of ALICE.

10-11:30 Concurrent MAC meeting/ General Audience Workshop TBD

11:30 Closing Remarks and Moving Forward

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Agenda

1. Welcome, brief introductions, icebreaker a) Share one policy that you wish were the same for all United Ways b) Icebreaker question

2) Overview of the policy process

3) Policies requiring board approval

a) Donors and designations b) Communication, including social media and digital communications c) Financial oversight d) Personnel, including succession planning and sexual harassment e) Public Policy f) Partnerships g) Legal

4) Policy Deskbook – Operational and Financial Policies

a) Structure b) Contribution Revenue c) Grants and Fiscal Sponsorship d) Expenditures e) Payroll f) General Ledger g) System Security h) Investments, Reserves, and Endowment

5) Wrap and Debrief