

| DAY/TIME | Room Assigned | Capacity | SEGMENT OF WORK | TITLE | SESSION DESCRIPTION | WORKSHOP FACILITATORS |
|-------------|---|----------|------------------------|--|--|--|
| WEDS 9:15AM | Westin - Gold Ballroom | 70 | LEADERSHIP DEVELOPMENT | OH SAY CAN YOU SEE? (Publicity and Communication Skills for Non-profits) | Beginning with the "shot heard 'round the world" the American Revolution was immediate international news. What a great model for any corporate or non-profit organization! Using concepts from our Founding Fathers, Storyteller Tim Lowry will teach you how to create a social movement to effectively communicate your group's mission and encourage people to spread the word far and wide. In this fun, interactive workshop Tim will help you identify the ideas, the narrative, the symbols, and the leadership required to grow a non-profit or corporation into a cultural force that is the talk of the town, the pride of the nation, and an international phenomenon! | Storyteller Tim Lowry - Summerville, SC |
| WEDS 9:15AM | Westin - Card Room | 50 | RESOURCE DEVELOPMENT | MAKE YOUR UNITED WAY A MAGNET FOR YOUNG DONORS | As United Way's current donor base begin to age out of the system, many United Ways are left struggling to fill that gap with members of the younger generation. The problem is that many in the younger generation don't know who your United Way is or what it does. In this session, we will look at the reasons younger donors are choosing other charities to donate to, how you can market your United Way's work in a way that is appealing to the younger generation, and how to locate the younger generation outside of the workplace. We will also highlight United Ways large and small who are successfully engaging the younger generation. | Gary Goscenski and Bryn Bogemann - Perspectives Consulting Group |
| WEDS 9:15AM | Westin - Francis Marion | 50 | RESOURCE DEVELOPMENT | BEST IN CLASS FUNDRAISING PRACTICES - LEVERAGING VOLUNTEERS TO DRIVE REVENUE | Join John Martin, Senior Vice President of Resource Development from United Way of Central Alabama to learn how to leverage your volunteers to help you stay relevant and engaged with corporate and community donors. Practical application and tools will be shared to scale to any size UW or community! | Lexi Savage, Engagement Director, U.S. Southeast Region, United Way Worldwide John Martin, Senior VP of Resource Development, UW of Central Alabama |
| WEDS 9:15AM | Westin - Furman Room | 40 | COMMUNITY IMPACT | LEVERAGING RESOURCE ALLOCATION AND GRANTMAKING TO ADVANCE EQUITY - FOCUS ON DEI STRATEGIES | A core part of United Way's work is fundraising and investing those resources back into the community to create positive change. Join us to learn how your United Way can make your strategic investments explicitly focused on closing gaps in opportunities, access, and resources to close persistent disparities between community residents and build the capacity of community organizations led by people of color. Speakers will reflect on how power dynamics between funders and funded organizations can reinforce and maintain existing inequities. You'll leave with a better understanding of how to leverage the Framework to strengthen your United Way's role as a fundraiser and community investor to advance equitable community change. | Ayeola Fortune, Interim Senior Vice President, Impact Team UWW, Nalisha Henry, VP of Community Impact, UW of Greenville County |
| WEDS 9:15AM | Westin - Palmetto | 40 | UNITED WAY 101 | UNITED WAY 101 | Start your United Way journey with the resources and knowledge you need to be successful! This session will draw from Welcome to United Way - a free 4-hour virtual onboarding session for all United Way staff. Meet new United Way colleagues and build relationships for support in the future. This session will include the basics of United Way: our vision and mission, our superpowers and our history. | Eric Glaser, Director US Network Engagement and Performance, UWW |
| WEDS 9:15AM | Marriott Courtyard - Charlestownes | 40 | VOLUNTEER ENGAGEMENT | VIRTUAL VOLUNTEERING | Many United Ways are pursuing a strong digital presence, aspiring to provide donors and advocates year-round virtual experiences. This session will tap into the experiences of early adopters of the "always-on" digital approach and provide special insights for optimizing use of all available engagement channels. | Edwin Goutier, Manager, Innovation, UWW |
| WEDS 9:15AM | Marriott Courtyard - Shoeless Joe Jackson | 40 | RESOURCE DEVELOPMENT | GROWING, MANAGING AND REPORTING ON YOUR ENDOWMENT | Learn about the internal and external-facing work Metro United Way has done to grow its endowment from less than \$2M in '17 to more than \$20M today. There will be a Q&A and an opportunity to draft your own high-level plan for growing/strengthening your own LUW's endowment. | David Lopez, Chief Development Officer, Metro United Way |

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| WEDS 9:15AM | Marriott Courtyard - Vardry McBee | 40 | COMMUNITY IMPACT | COLLABORATIONS AND MERGERS - JOINING FORCES FOR GREATER IMPACT | Increasingly United Ways are looking at ways to work better together. Collaborations can lead to increased efficiencies, donor engagement, and innovation. Mergers represent the ultimate collaboration. This session will build off the new Mergers Playbook to explore how to determine if a merger is right for their organization as well as the best and leading practices United Ways have employed in designing their mergers. | John Emge, Engagement Director, Northeast Region, United Way Worldwide, Leslie Salling, President & CEO, UW of East Tennessee Highlands |
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| WEDS 11AM | Westin - Gold Ballroom | 70 | RESOURCE DEVELOPMENT | INCREASING REVENUE DESPITE DECLINING WORKFORCE CAMPAIGNS | How do you diversify your revenue sources, create new avenues for funding, seek out support in new ways, and open the door to your United Way to not only survive the national trend of declining workforce campaign dollar and donors, but also THRIVE in a time of change? Come hear two local United Way CEO's in small to mid-sized organizations who have been challenged to think differently about how they pursue support and what the results have taught them. | George McCanless, President & CEO, United Way of Central Georgia; Matt Ryerson, President & CEO, United Way of Greater Knoxville |

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| WEDS 11AM | Westin - Card Room | 50 | DEI/BOARD DEVELOPMENT/LEADERSHIP | LEADING A UNITED WAY DURING TIMES OF CHANGE | Most UWs are in the midst of one or more transformational change initiatives including becoming a racial equity champion, strengthening their digital engagement efforts, and framing and unbundling their impact agenda into a set of compelling investment opportunities. Successful intensive change efforts such as these demand a crystal clear vision for success, empowerment of and effective communications with staff and board and alignment of functions and workflow. In this session two United Way leaders will explore successes and challenges they faced as they navigated the lifecycle of change at their United Way. | Matt Marshall, CEO, United Way of W. Tennessee and Meghan Barp, CEO, United Way of Greenville County with Facilitator Eric Glaser, Director US Network Engagement and Performance, UWW |
| WEDS 11AM | Westin - Francis Marion | 50 | RESOURCE DEVELOPMENT | GRANTS 101 | Grants can generate tremendous outcomes for United Ways that are diversifying their funding and seeking to make bigger impacts in their communities. Come learn about how to find grant opportunities, as well as determine what makes a good fit your organization's priorities. Attendees will learn about typical proposal elements you'll want to have "at-the-ready", what makes a good proposal, and some tips for setting up a successful grant development process and timeline. Mark will also share about the importance of community and partner engagement as a proposal develops, the benefits of collaborations, and how to cultivate long-term relationships with funders. | Mark Vanderpool, Grant Consultant - Beaufort, SC and Mary Graham, President & CEO, United Ways of Tennessee |
| WEDS 11AM | Westin - Furman Room | 40 | COMMUNITY IMPACT | AUTHENTIC ENGAGEMENT THAT INFORMS STRATEGY AND PARTNERSHIPS | Engaging diverse community and corporate partners authentically to address local and systemic issues is hard work. Hear about the journey, lessons learned, and tools and techniques Trident United Way has used to build bridges and affect change within its networks in education, financial stability and health to support long-term and sustainable systems change. | Amanda Lawrence, Vice President of Community Impact, Trident United Way |
| WEDS 11AM | Westin - Palmetto | 40 | COMMUNITY IMPACT | COLLABORATIONS AND MERGERS - JOINING FORCES FOR GREATER IMPACT | Increasingly United Ways are looking at ways to work better together. Collaborations can lead to increased efficiencies, donor engagement, and innovation. Mergers represent the ultimate collaboration. This session will build off the new Mergers Playbook to explore how to determine if a merger is right for their organization as well as the best and leading practices United Ways have employed in designing their mergers. | John Emge, Engagement Director, Northeast Region, United Way Worldwide, Leslie Salling, President & CEO, UW of East Tennessee Highlands |
| WEDS 11AM | Marriott - Charlestownes | 40 | RESOURCE DEVELOPMENT | BEST IN CLASS FUNDRAISING PRACTICES - GATED COMMUNITY CAMPAIGNS | North and South Carolina UW leaders team up to share their campaign success with gated communities. Learn about how they got started, their successful process and great examples that lead to new and increased giving. Dale Douthat, CEO of UW of the Low Country and Katie Childs, CEO of UW of Chatham County will get you started on your way to this innovative revenue builder. | Dale Douthat, CEO, Low Country United Way and Katie Childs, CEO, United Way of Chatham County |
| WEDS 11AM | Marriott - Shoeless Joe Jackson | 40 | LEADERSHIP DEVELOPMENT | DATA DRIVEN INNOVATION: MEETING NEEDS AND INCREASING REVENUE | Using data to help drive decision-making is something United Ways talk about often, but what can this look like? Through the ALICE Report as well as other state and local data, the United Way of the Ocoee region (UWOR) has fundamentally changed how funds are invested in our community. This evolution began several years ago when UWOR created the Community Needs Identification Committee with the sole purpose of researching, analysing, and collecting data to determine the most pressing needs of the individuals and families we serve. Thanks for the work of this Committee, UWOR has become an expert on the complex problems impacting our community. This session will lead you through the steps of using data to "move the needle" on your most pressing needs, while also sharing insights around developing internal programming and increasing revenue to maximize community impact. | Stephanie Linkous, President and CEO and Jaynese Waddell, Director of Community Impact, United Way of the Ocoee Region |

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| WEDS 11AM | Marriott - Vardry McBee | 40 | LEADERSHIP DEVELOPMENT | BUILDING AN ACTIVE AND ENGAGED BOARD OF DIRECTORS | Creating a thriving Board of Directors evolves from consistent and intentional focus and action. We'll examine building a board, engaging all board members, and stimulating thoughtful conversation which leads to a better board experience. Explore actions to create an effective board via a 3-phase board building cycle: Strategic Recruitment; Effective Engagement; Intentional Revitalization. This is a highly interactive presentation in which you'll leave inspired and ready to try at least 2 new ideas to build meaningful board engagement. | Jeanne Allen, Board Consultant |
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| WEDS 3:00PM | Westin - Gold Ballroom | 70 | DEI/BOARD DEVELOPMENT/LEADERSHIP | STORIES BUILD COMMUNITY | True connection requires deeply meaningful communication. All too often we talk about one another, over one another, at one another, but never WITH one another. Communication is an exchange of ideas, a two way street with stories being told and stories being heard. The very strongest connections are built when the stories are told and heard with heart and soul. This deeply meaningful use of stories is called a "Ladder to the Moon" and has been used by great leaders for millennia to foster communication, strengthen relationships, and bind people together in community. Learn about this ancient tradition and begin building stronger relationships today! | Storyteller Tim Lowry - Summerville, SC |
| WEDS 3:00PM | Westin - Card Room | 50 | DEI/BOARD DEVELOPMENT/LEADERSHIP | PRACTICE EQUITY DAILY | As you integrate a focus on race, equity and inclusion, you'll need to build individual and organizational capacity so you can move the work forward together productively and sustainably. In this session we will explore the five ways to help you build your organizational capacity and the capacity of individuals in your organizational system. | Geniro Dingle, Director, Diversity, Equity & Inclusion, UWW; Shaunae Motley, President and CEO of United Way of Southwest Georgia |
| WEDS 3:00PM | Westin - Francis Marion | 50 | RESOURCE DEVELOPMENT | CULTIVATING AND ENGAGING CORPORATE PARTNERS | United Way relies on corporate partners for the vast majority of fundraising. As competition increases for charitable dollars, United Ways must strengthen their corporate relationships and move beyond the traditional workplace campaign. Join us to hear how United Way Worldwide is approaching strengthening its relationships and what resources are available so local United Ways can continue to be the philanthropic partner of choice. | Michael Kerkorian, Senoir Director Corporate Relations, UWW |
| WEDS 3:00PM | Westin - Furman Room | 40 | UNITED WAY 101 | UNITED WAY 101 | Start your United Way journey with the resources and knowledge you need to be successful! This session will draw from Welcome to United Way - a free 4-hour virtual onboarding session for all United Way staff. Meet new United Way colleagues and build relationships for support in the future. This session will include the basics of United Way: our vision and mission, our superpowers and our history. | Eric Glaser, Director US Network Engagement and Performance, UWW |
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| WEDS 3:00PM | Marriott - Charlestownes | 40 | RESOURCE DEVELOPMENT | EMPOWERING STAFF TO BE SUCCESSFUL: DRIVING MAJOR GIFT STRATEGIES | Your organization's success is powered by your people. The staff, the volunteers and YOU! After all, the goal is bringing in more dollars and more donors - RIGHT? Join us today as we help you leverage the incredible potential that lies within a strong Tocqueville Program by reigniting a back to basics approach. In this workshop-style session participants will first assess their Tocqueville Society's current state and then use tools to help optimize structure and engagement gaining new ideas, strategies and tactics to accomplish greater results. | Jennifer Gipp, Director, Major Giving & Tocqueville, UWW, Jessica Hopper, Director of Major Gifts and Courtney Orazine, Major Gifts Officer, UW of Central Alabama |

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| THURS 8:30AM | Westin - Gold Ballroom | 70 | COMMUNITY IMPACT | APPROACHES TO POVERTY REDUCTION: CREATING THE CONDITIONS FOR CHANGE | The development of poverty reduction efforts emerge from a deep investment in listening, learning, and organizing for change. Organizations invested in addressing poverty must embrace the complexity of poverty, understand stakeholders and through collaboration foster approaches that adapt to the changing context of their community. The role of a backbone serves to originate solutions, support continuous quality improvements, and act as a policy leader to mobilize partners to pursue the cross-sector collaboration, alignment, and communication to achieve population level change. In this session, the United Way of the Mid-South and the United Way of Greater Nashville will share their approaches to poverty reduction and discuss the unique ways that they affect the backbone role. | Rod Devore, Director 2Gen Initiatives, UW of Greater Nashville; Twana Whitlock, Associate Director Agency Relationships, Driving the Dream and Shayla Kolkeim, Director, Driving the Dream, UW of the Mid-South |
| THURS 8:30AM | Westin - Francis Marion | 50 | LEADERSHIP DEVELOPMENT | ADVOCACY 101 | What is advocacy vs. public policy, and what can and should my United Way be doing in this space--and to what benefit? We will give you the basic knowledge of how legislatures and state and local policymaking bodies are structured, tips for effective engagement, and tactics for how to utilize this work to elevate your impact and value. Spoiler alert: you're already doing some of this work--let's make it even more powerful! | Mary Graham, President & CEO, United Ways of TN; Kevin Middleton, President, UW of Kentucky |
| THURS 8:30AM | Westin - Furman Room | 40 | COMMUNITY IMPACT | CHANGING YOUR ALLOCATION MODEL | Is your United Way considering shifting its allocations strategy away from the "community chest" or more traditional agency funding model and towards a more modern and collaborative impact approach? Learn from two United Ways that have already done all the hard work to ensure that your United Way can increase its ability to be more flexible and respond to emerging community needs. Join CEO Blakely Roof from Myrtle Beach and VP of Community Investments, Abby Garrison of Chattanooga to hear real examples of lessons learned from the shifts their United Ways recently made. Walk away with concrete examples and all the tools you need to implement this change to make an even greater impact in your community! | Blakely Roof, President & CEO - UW of Horry County and Abby Garrison, VP of Community Investments, UW of Greater Chattanooga |
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| THURS 8:30AM | Marriott - Shoeless Joe Jackson | 40 | COMMUNITY IMPACT | LEVERAGING RESOURCE ALLOCATION AND GRANTMAKING TO ADVANCE EQUITY - FOCUS ON DEI STRATEGIES | A core part of United Way's work is fundraising and investing those resources back into the community to create positive change. Join us to learn how your United Way can make your strategic investments explicitly focused on closing gaps in opportunities, access, and resources to close persistent disparities between community residents and build the capacity of community organizations led by people of color. Speakers will reflect on how power dynamics between funders and funded organizations can reinforce and maintain existing inequities. You'll leave with a better understanding of how to leverage the Framework to strengthen your United Way's role as a fundraiser and community investor to advance equitable community change. | Ayeola Fortune, Interim Senior Vice President, Impact Team UWW, Nalisha Henry, VP of Community Impact, UW of Greenville County |
| THURS 8:30AM | Marriott - Charlestownes | 40 | LEADERSHIP DEVELOPMENT | Transformation? Evolution? REVOLUTION! | Fast-tracking change, our United Way has tipped many things upside down to become an organization that demonstrates our value to the community. We treat donors as customers, build relationships with the business community by asking "what needs do you have that we can help you solve," have changed our Board engagement with clear delineation of roles, cut programs and staff positions to focus on a true "growth mindset" and more. Our strategic plan is a one-page actionable document and our shift in the traditional allocations model still measures outcomes and impact. Change has produced a healthy culture where everyone is leading from wherever they sit, not because of their title. Join this session to learn and discuss how your United Way can be part of the revolution toward great purpose and stronger results. | Jeff Hayward, President and CEO, Heart of Florida United Way |
| THURS 8:30AM | Marriott - Vardy McBee | 40 | RESOURCE DEVELOPMENT | EMPOWERING STAFF TO BE SUCCESSFUL: DRIVING MAJOR GIFT STRATEGIES | Your organization's success is powered by your people. The staff, the volunteers and YOU! After all, the goal is bringing in more dollars and more donors - RIGHT? Join us today as we help you leverage the incredible potential that lies within a strong Tocqueville Program by reigniting a back to basics approach. In this workshop-style session participants will first assess their Tocqueville Society's current state and then use tools to help optimize structure and engagement gaining new ideas, strategies and tactics to accomplish greater results. | Jennifer Gipp, Director, Major Giving & Tocqueville, UWW, Jessica Hopper, Director of Major Gifts and Courtney Orazine, Major Gifts Officer, UW of Central Alabama |
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| THURS 1:00PM | Westin - Gold Ballroom | 70 | RESOURCE DEVELOPMENT | BEST IN CLASS FUNDRAISING PRACTICES - A HIGH LEVEL LOOK AT REVENUE DIVERSIFICATION STRATEGIES FOR ANY UW | This session will highlight best practices from Heart of Florida United Way in Orlando, Florida. Learn about overall campaign planning, prioritizing and developing strategies for growing key corporate accounts, re-engaging lackluster accounts and generating new business! We will also discuss fee for service volunteerism and how to offer seamless experiences for donors in the workplace and beyond. Data and Growth Mindset will be at the core of all of these strategies. | Lexi Savage, Engagement Director, U.S. Southeast Region, UWW and Graciela Jacoby, COO Heart of Florida United Way |
| THURS 1:00PM | Westin - Card Room | 50 | RESOURCE DEVELOPMENT | DIVERSIFYING YOUR REVENUE STREAMS: A MASTERED APPROACH TO SUSTAINABLE FUNDING THAT TAKES A COMMUNITY | Join us for a robust discussion on how to develop sustainable funding and diversify revenue channels. A clear priority for our network as noted in the recent survey conducted by UWW, this session will provide practical examples and foundational methods to build and grow planned giving and endowment strategies. Hear from United Way staff and Million Dollar Roundtable donors on the opportunities and challenges we face, as well as the long term success a community can have with the right focus and approach. | Brett Eckerman, President & CEO, UW of Iredell County, Meagan Flippin, President & CEO, UW of Rutherford & Cannon Counties, Jennifer Gipp, Director Major Giving & Tocqueville, UWW |

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| THURS 1:00PM | Westin - Francis Marion | 50 | DEI/BOARD DEVELOPMENT/LEADERSHIP | SOLUTIONS FOR YOUR LARGEST MARKETING CHALLENGES | Join us for an honest conversation about the common marketing challenges facing United Ways today that will never be solved by marketing alone. We will dissect why it is difficult for people to understand what United Ways do, investigate why it is impossible to create a simple United Way message, and uncover why United Ways often have a severely limited marketing budget. We will look at strategies your United Way can use to address these challenges and you will be inspired by examples from United Ways both large and small. | Gary Goscenski and Bryn Bogemann - Perspectives Consulting Group |
| THURS 1:00PM | Westin - Furman Room | 40 | COMMUNITY IMPACT | CHANGING YOUR ALLOCATION MODEL | Is your United Way considering shifting its allocations strategy away from the "community chest" or more traditional agency funding model and towards a more modern and collaborative impact approach? Learn from two United Ways that have already done all the hard work to ensure that your United Way can increase its ability to be more flexible and respond to emerging community needs. Join CEO Blakely Roof from Myrtle Beach and VP of Community Investments, Abby Garrison of Chattanooga to hear real examples of lessons learned from the shifts their United Ways recently made. Walk away with concrete examples and all the tools you need to implement this change to make an even greater impact in your community! | Blakely Roof, President & CEO - UW of Horry County and Abby Garrison, VP of Community Investments, UW of Greater Chattanooga |
| THURS 1:00PM | Westin - Palmetto | 40 | DEI/BOARD DEVELOPMENT/LEADERSHIP | PRACTICE EQUITY DAILY | As you integrate a focus on race, equity and inclusion, you'll need to build individual and organizational capacity so you can move the work forward together productively and sustainably. In this session we will explore the five ways to help you build your organizational capacity and the capacity of individuals in your organizational system. | Geniro Dingle, Director, Diversity, Equity & Inclusion, UWW; Shaunae Motley, President and CEO of United Way of Southwest Georgia |
| THURS 1:00PM | Marriott - Charlestownes | 40 | COMMUNITY IMPACT | BUILDING A COMMUNITY THROUGH CONNECTIONS - A RESOURCE CENTER TO SERVE OUR MOST VULNERABLE NEIGHBORS | Hear from a collaborative team representing nonprofit, faith, and local government agencies working together to create a resource center for the most vulnerable residents of Henderson County, NC. The Hendersonville Connections Center, once completed, will house satellite offices from over a dozen agencies, all operating in coordination to remove barriers and help restore hope and healing for our neighbors experiencing homelessness, substance abuse, and other complex social challenges. We'll walk through how the HCC has grown from an idea to a team with over \$3million committed for the purchase and renovation of our 10,000 square foot warehouse space, and the lessons we've learned – and are STILL learning – along the way. | Sarah Kowalak, Director of Community Impact, UW of Henderson County |
| THURS 1:00PM | Marriott - Shoeless Joe Jackson | 40 | RESOURCE DEVELOPMENT | CULTIVATING AND ENGAGING CORPORATE PARTNERS | United Way relies on corporate partners for the vast majority of fundraising. As competition increases for charitable dollars, United Ways must strengthen their corporate relationships and move beyond the traditional workplace campaign. Join us to hear how United Way Worldwide is approaching strengthening its relationships and what resources are available so local United Ways can continue to be the philanthropic partner of choice. | Michael Kerkorian, Senior Director Corporate Relations, UWW |
| THURS 1:00PM | Marriott - Vardy McBee | 40 | LEADERSHIP DEVELOPMENT | TELL ME ABOUT IT: <i>Getting team members to take ownership of their actions</i> | Management is responsible for addressing performance deficiencies, yet many attempts are repetitively unsuccessful. Why? Because management go about addressing the issues the wrong way. Simply telling someone what to do and how to do it isn't going to offer long-term sustainable improvement. The "Tell Me About It" process is a proven, 5-step process for manager's to use in getting employees to take ownership of their actions and correcting their own performance issues. This interactive workshop will explore the "Tell Me About It" process and share insights around correctly applying it for long-lasting, sustainable performance results. | Nancy Eichstadt, Managing Partner, Leadership Management International |

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| THURS 3:30-4:00pm | Westin - Card Room | 40 | ANGELA WILLIAMS CONVERSATION WITH CPOS | ANGELA F. WILLIAMS - UNITED WAY LEADERSHIP | Join your colleagues and Angela F. Williams, President and CEO United Way Worldwide to discuss the renewed focus and vision for United Way work ahead. | Angela F. Williams, President & CEO, United Way Worldwide |
| THURS 4:15-4:45pm | Westin - Card Room | 40 | ANGELA WILLIAMS CONVERSATION WITH CPOS | ANGELA F. WILLIAMS - UNITED WAY LEADERSHIP | Join your colleagues and Angela F. Williams, President and CEO United Way Worldwide to discuss the renewed focus and vision for United Way work ahead. | Angela F. Williams, President & CEO, United Way Worldwide |
| THURS 3:30PM | Westin - Francis Marion | 50 | SINGLE CARE | HOW SINGLE CARE - FORMERLY FAMILYWISE - CAN HELP YOU REACH YOUR IMPACT GOALS! | Come to a collaborative discussion on how SingleCare, a pharmacy discount card, can help United Ways achieve their community impact goals by wrapping it around current programming, with little effort and big impact. | Vilmarie Gilliam, VP Partnerships/Business Development, SingleCare |
| THURS 3:30pm | Westin - Palmetto | 40 | UPIC | CRM LITE | Learn how to easily setup, run and manage a seamless online giving experience for existing and potential donors. Boost fundraising to support your causes through online donation forms that integrate with CRM Lite. An easy, quick to deploy online giving platform for United Ways of all sizes. | Don Bayne, Vice President Partner Success, Upic Solutions |
| THURS 3:30pm | Marriott Courtyard - Vardry McBee | 40 | STRATUS LIVE | AN INSIDER'S GUIDE TO MODERN CSR PARTNERSHIPS | Join StratusLIVE and United Way of Greenville County for a fresh take on CSR partnerships. Our team of CSR practitioners and technology veterans will discuss the key priorities of corporate partners today and outline a value proposition to position your United Way for workplace giving success. You'll also hear from United Way of Greenville County as they offer best practices and tips from their experience working with corporate partners. | Kelly Perry, Digital Marketing Manager and Debbie Snyder, Group VP Sales and Marketing STRATUS LIVE in partnership with Paula Elrod and Kate Malewich of UW of Greenville County |
| THURS 3:30pm | Marriott Courtyard - Charlestownes | 40 | UNITE US | TRANSFORM OUTCOMES THROUGH COLLABORATION AND COMMUNITY IMPACT | True health equity can only be attained by scalable, systemic change that enlists the participation, support and funding of partners from all sectors: community, healthcare, government, philanthropy and business. At the same time, we know that social care needs to be elevated to the same level as healthcare in this country. Unite Us is helping community-based organizations and their partners better meet community need and address the Social Determinants of Health in a systemic, outcomes-based way in NC, VA, SC, GA and LA. Come learn about this groundbreaking work that is happening right now. | Luciano Ramos, Director Local Partnerships, Georgina Dukes, Regional Network Director and Liz Walsh, State Network Director SC and AL, Unite Us |
| THURS 3:30pm | Marriott Courtyard - Shoeless Joe Jackson | 40 | AMAZON BUSINESS | AMAZON BUSINESS HELPS NONPROFITS TO EFFECTIVELY STREAMLINE AND MAXIMIZE THEIR BUY | Join United Way's dedicated Amazon Business advisors for a discussion on how Amazon Business helps nonprofits to maximize their procurement efforts through business analytics, ongoing education, and new programs designed specifically for nonprofits. Included in the presentation will be a demo for Amazon Business showing features that will help streamline your day to day and buy more effectively. | Juan Ramirez, Nonprofit Senior Customer Advisor & Alex Corley, Customer Advisor Non-profit - Amazon Business |

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| 1 - Poinsett Ballroom | STATION 1 - WEDS 8:30-9:00AM | Affinity Group Best Practices | Increase your annual giving revenue by building a personal relationship with donors and prospective donors through programing, social and hands on volunteer experiences that encourage them to deepen their understanding of community issues. | Kate Malewich, Director of Volunteer Engagement, UW of Greenville County |
| 2 - Poinsett Ballroom | STATION 1 - WEDS 8:30-9:00AM | Business Development Success | Learn about how to convert new business prospects into engaged revenue generating partners. Strategies include prospect prioritization, cultivation and stewardship. | Jennifer Crabtree, Corporate Giving Manager and Alex Burnside, Corporate Giving Director, UW of Greenville County |
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| 5 - Poinsett Ballroom | STATION 1 - WEDS 8:30-9:00AM | VITA Best Practices | Learn how the Volunteer Income Tax Assistance Program helps community members obtain all eligible deductions and how keeping more of their hard earned money supports financial stability. | Craig Shoemaker, Director of Financial Stability and Tiffany Bannister, VITA Program Coordinator, UW of Greenville County |
| 6 - Poinsett Ballroom | STATION 1 - WEDS 8:30-9:00AM | First 5 steps to build race/equity champions | This session will be a discussion of the five ways to help you build your organizational capacity and the capacity of individuals in your United Way to focus on race, equity and inclusion. | Geniro Dingle, Director Diversity, Equity & Inclusion, UWW and Matt Marshall, CEO, United Way of W. Tennessee |
| 7 - Poinsett Ballroom | STATION 1 - WEDS 8:30-9:00AM | Afterschool Network | Come learn about the power of collective action locally, regionally and/or at the state level in developing networks to ensure more equity, obtain grants, pass legislation, improve government relations, and achieve outcomes in reading, substance abuse prevention, STEM, service, career exploration, and catching kids up academically from the pandemic. Leave with free resources you can "steal" and replicate back home. | Mary Graham, President and CEO, United Ways of Tennessee |
| 8 - Poinsett Ballroom | STATION 1 - WEDS 8:30-9:00AM | Third Party Processors and corporate partners | Join UWW's Corporate Relations leader for a conversation on the GCL program and working with third party processors. This session will provide a quick overview of the program including tips for managing accounts locally and best practices around third party processors like Benevity. | Michael Kerkorian, Senior Director, Corporate Relations, UWW |
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| 10 - Poinsett Ballroom | STATION 1 - WEDS 8:30-9:00AM | Stop sharing your partner's stories: share YOUR impact | When United Ways focus on highlighting the accomplishments of their partner agencies, your donors are often confused as to what your United Way does and why they should give to your United Way. In this session we will discuss how you can start to put your United Way front and center in your own marketing. We will show you the dos and don'ts for presenting your United Way's impact and share inspirational examples of United Ways of all sizes who are effectively marketing their impact. | Gary Goscenski and Bryn Bogemann, Perspectives Consulting Group |
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| 12 - Poinsett Ballroom | STATION 1 - WEDS 8:30-9:00AM | Pathways from Poverty | In an effort to achieve their financial stability goal of ensuring that 3,000 families and individuals will find a pathway out of poverty by 2030, United Way of Pickens County established the Pathways program. Pathways is a 6-18 month intensive, one-on-one financial coaching program designed to equip hardworking, low-income individuals and families with the skills, assistance, knowledge, and resources necessary to achieve freedom over their finances. Let's talk about how to create a program from scratch that includes planning, research and the piloting period. | Jeremy Price, Director of Financial Stability, UW of Pickens County |
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| 14 - Poinsett Ballroom | STATION 1 - WEDS 8:30-9:00AM | Upic Solutions | Hear from Upic Solutions United Way partners on how they use our shared services and products to help innovate at their United Way. | Don Bayne, Vice President Partner Success, Upic Solutions |
| 15 - Poinsett Ballroom | STATION 1 - WEDS 8:30-9:00AM | Marking the Milestone: Strategies for Leveraging Our Centennial | As the oldest United Way in North Carolina, United Way of Asheville & Buncombe County has spent much of the last year celebrating our centennial journey - despite the challenges posed by the COVID-19 pandemic. Our celebration strategy was built on a three-pronged approach that included multifaceted initiatives aimed at community engagement, story-telling and resource development. At this station, UWABC staff will be on hand to share resources, collateral, best practices and lessons learned. | Dan Leroy, President and CEO, United Way of Asheville & Buncombe County |
| 16 - Poinsett Ballroom | STATION 1 - WEDS 8:30-9:00AM | Building Coordinated Care Networks | Unite Us is a technology company that builds coordinate care networks of health and social service providers. Partnering with United Ways to increase funding, improve community outcomes and help communities transform their ability to work together and measure impact at scale. With Unite Us, partners across sectors send and receive secure electronic referrals, track every person's individual journey, and report outcomes across a full range of services in a centralized, cohesive and collaborative ecosystem. Together we build authentic, lasting partnerships with local organizations to ensure our networks have a solid foundation, launch successfully and continue to grow and thrive. | Liz Walsh, SC State Director and Rosa Pitts, Mississippi State Director with Unite Us |
| 17 - Poinsett Ballroom | STATION 1 - WEDS 8:30-9:00AM | Ready to Assess? Options for Completing this year's Membership Requirement | Every 3 years, all United Ways must complete a volunteer-led self-assessment of their financial management governance and community impact work. Many United Ways put assessments on hold over the last two years, so it's time to consider your options and get your questions answered. UWW will provide information about the requirement as well as the Modern United Way Self-Assessment, a tool designed specifically for this purpose. | Danielle Baker, Manager of Membership Accountability, UWW |

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| 19 - Poinsett Ballroom | STATION 1 - WEDS 8:30-9:00AM | Turning Participants Into Dollars | Learn how United Way of Central Carolinas used data from their 21-Day Racial Equity Challenge to identify new donors and enhance connections to existing donors. The result? New and scalable solicitation efforts and increases in RUM giving for scalable value. using the data to dig deep into connections, donors and an increase in dollars. Digging deeper connects donors and dollars. | Allison Rhodes, Relationship Manager, United Way of Central Carolinas |
| 20 - Poinsett Ballroom | STATION 1 - WEDS 8:30-9:00AM | Open conversation on how your UW is rebounding from COVID-19 impact | Join your colleagues to talk about the challenges your UW has faced as you rebound from the impacts of COVID-19. Share any successful practices that might help others for moving forward. | Laura Marx, President and CEO, United Way of North Carolina |
| 21 - Poinsett Ballroom | STATION 1 - WEDS 8:30-9:00AM | Strategic Partnerships and Advocacy | This session will walk you through identifying potential partners for your advocacy efforts. Learn how to cultivate and utilize strategic partnerships to expand your advocacy capacity and reach. | Naomi Lett, President and CEO, United Way Association of South Carolina |
| 22 - Poinsett Ballroom | STATION 1 - WEDS 8:30-9:00AM | House KNOX | Come learn about HouseKnox, an innovative housing initiative that supports property managers who work with housing agencies, enabling them to become eligible for special benefits that support at-risk populations. Leave with tools do replicate efforts to produce outcomes and raise your United Way's value proposition with donors and other financial resources. | Michael Sears, Housing Navigator, UW of Greater Knoxville |
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| 25 - Poinsett Ballroom | STATION 1 - WEDS 8:30-9:00AM | QGiv | Qgiv is an online fundraising platform empowering over 13,000 nonprofit fundraisers to raise money for their causes. Through online giving and event registration forms, text fundraising, peer-to-peer fundraisers, and auction events, fundraisers can provide a more personalized giving experience for donors while keeping costs low. Stop by to learn more! | Jack Nelson, Director of Business Development |

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| 26 - Mezzanine | STATION 1 - WEDS 8:30-9:00AM | ALICE CASE MANAGEMENT | Comprehensive case management and support helps move our ALICE families from striving to make it to thriving. By using partnership with local churches and all volunteers, this is a low cost and value add program. | Naomi Asher, Executive Director, United Way of Anderson County |
| 27 - Mezzanine | STATION 1 - WEDS 8:30-9:00AM | LEAD UNITED | Lead United, a comprehensive community leadership and nonprofit board development program, leverages partnerships to build nonprofit capacity in our Tri-County service area. More than just a professional development opportunity, this program has helped Trident United Way strengthen relationships with its local Chamber of Commerce, community and corporate partners to grow a pool of qualified, diverse board members, while also generating revenue for our organization. Join us in discussing how the art of "give and take" through partnerships can truly blossom into meaningful impact of your community and United Way | Amanda Sito, Strategic Volunteer Engagement Director, Trident United Way |
| 28 - Mezzanine | STATION 1 - WEDS 8:30-9:00AM | S.E.R.V.E. - Students Engaged in Rewarding Volunteer Experiences | SERVE, which stands for Students Engaged in Rewarding Volunteer Experiences, is a partnership between Coulter Grove Intermediate School, Montgomery Ridge Intermediate School and United Way of Blount County. This partnership enables several hundred students to get out into the community while completing service projects at numerous non-profit organizations. Learn how this project simultaneously encourages community service and local philanthropy. | Jennifer Wackerhagen, President and CEO, UW of Blount County |
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| 19 - Poinsett Ballroom | STATION 2 - THURS 2:45-3:15pm | Campaign Automation | Having to do more with less these days? Learn how looking at lower dollar (but no less important) workplace campaigns differently can result in increased engagement and revenue. Automating certain segments of workplace campaigns lets staff focus on high value tasks. What is automation? Attend and find out! | Allison Rhodes, Relationship Manager, United Way of Central Carolinas |
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| 5 - Poinsett Ballroom | STATION 3 - THURS 3:30-4:00pm | Position your UW for the future | Don't wait another day to position your United Way to stay ahead of the curve! We'll show you how to overcome the challenges you are facing today by redirecting the purpose of your United Way. You will learn all about the Issue Focus Model for United Ways and how it will allow you to grow and diversify your revenue, measurably change lives in your community, simplify your message, and increase understanding of your work. You'll be inspired by examples from issue focused United Ways of all sizes that are relevant and sustainable now and for the future. | Gary Goscenski and Bryn Bogemann, Perspectives Consulting Group |

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| 7 - Poinsett Ballroom | STATION 3 - THURS 3:30-4:00pm | Pathways from Poverty | In an effort to achieve their financial stability goal of ensuring that 3,000 families and individuals will find a pathway out of poverty by 2030, United Way of Pickens County established the Pathways program. Pathways is a 6-18 month intensive, one-on-one financial coaching program designed to equip hardworking, low-income individuals and families with the skills, assistance, knowledge, and resources necessary to achieve freedom over their finances. Let's talk about how to create a program from scratch that includes planning, research and the piloting period. | Jeremy Price, Director of Financial Stability, UW of Pickens County |
| 8 - Poinsett Ballroom | STATION 3 - THURS 3:30-4:00pm | Stratus LIVE | United Ways today must continue to expect the unexpected. The constant shifts in the fundraising environment require that the United Way network diversify their fundraising revenue beyond workplace giving. In this innovation station, we will discuss five ways to cultivate your donor base outside the workplace. We will also demonstrate how to leverage StratusLIVE Ignite as a digital engagement tool to serve ALL donors - no matter their workplace. | Brandon Fix, Business Development Manager, Stratus LIVE |
| 9 - Poinsett Ballroom | STATION 3 - THURS 3:30-4:00pm | Building Coordinated Care Networks | Unite Us is a technology company that builds coordinate care networks of health and social service providers. Partnering with United Ways to increase funding, improve community outcomes and help communities transform their ability to work together and measure impact at scale. With Unite Us, partners across sectors send and receive secure electronic referrals, track every person's individual journey, and report outcomes across a full range of services in a centralized, cohesive and collaborative ecosystem. Together we build authentic, lasting partnerships with local organizations to ensure our networks have a solid foundation, launch successfully and continue to grow and thrive. | Liz Walsh, SC State Director and Rosa Pitts, Mississippi State Director with Unite Us |
| 10 - Poinsett Ballroom | STATION 3 - THURS 3:30-4:00pm | Ready to Assess? Options for Completing this year's Membership Requirement | Every 3 years, all United Ways must complete a volunteer-led self-assessment of their financial management governance and community impact work. Many United Ways put assessments on hold over the last two years, so it's time to consider your options and get your questions answered. UWW will provide information about the requirement as well as the Modern United Way Self-Assessment, a tool designed specifically for this purpose. | Danielle Baker, Manager of Membership Accountability, UWW |
| 11 - Poinsett Ballroom | STATION 3 - THURS 3:30-4:00pm | Give Pulse | Join for a discussion of best practices on community engagement. Learn how GivePulse can simplify your volunteer and event management processes while enhancing your reach and bringing new supporters to your organization. And see how other United Ways are leveraging the GivePulse platform as a one stop shop for advertising and coordinating needs throughout their network of community partners. | Raul Escobar and Nathan Broad, Community Engagement Outreach Coordinators, GivePulse |
| 12 - Poinsett Ballroom | STATION 3 - THURS 3:30-4:00pm | House KNOX | Come learn about HouseKnox, an innovative housing initiative that supports property managers who work with housing agencies, enabling them to become eligible for special benefits that support at-risk populations. Leave with tools do replicate efforts to produce outcomes and raise your United Way's value proposition with donors and other financial resources. | Michael Sears, Housing Navigator, UW of Greater Knoxville |

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| 13 - Poinsett Ballroom | STATION 3 - THURS 3:30-4:00pm | 1,000,000 Words A Year: Improving Reading Engagement Through The Midlands Reading Consortium | The Midlands Reading Consortium (MRC) is a volunteer tutoring initiative aimed at improving reading engagement for elementary students, Pre-K to 2 nd Grade, in school districts across five of South Carolina's counties. Richland, Lexington, Newberry, Fairfield and Orangeburg. For almost 15 years, MRC has addressed low reading proficiency in elementary schools by supplementing and enhancing shared reading experiences between volunteers and striving readers. During this innovation station discussion, attendees will learn how MRC is planned, facilitated, assessed, and sustained. | Jabari Bodrick, PhD., Director of Education and Resiliency, UW of the Midlands |
| 14 - Poinsett Ballroom | STATION 3 - THURS 3:30-4:00pm | LEAD UNITED | Lead United, a comprehensive community leadership and nonprofit board development program, leverages partnerships to build nonprofit capacity in our Tri-County service area. More than just a professional development opportunity, this program has helped Trident United Way strengthen relationships with its local Chamber of Commerce, community and corporate partners to grow a pool of qualified, diverse board members, while also generating revenue for our organization. Join us in discussing how the art of "give and take" through partnerships can truly blossom into meaningful impact of your community and United Way. | Amanda Sito, Strategic Volunteer Engagement Director, Trident United Way |
| 15 - Poinsett Ballroom | STATION 3 - THURS 3:30-4:00pm | Qgiv | Qgiv is an online fundraising platform empowering over 13,000 nonprofit fundraisers to raise money for their causes. Through online giving and event registration forms, text fundraising, peer-to-peer fundraisers, and auction events, fundraisers can provide a more personalized giving experience for donors while keeping costs low. Stop by to learn more! | Jack Nelson, Director of Business Development, Qgiv |
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| | STATION 4 - 4:15-4:45PM | TITLE | DESCRIPTION | LEADERSHIP |
| 1 - Poinsett Ballroom | STATION 4 - 4:15-4:45PM | Business Development Success | Learn about how to convert new business prospects into engaged revenue generating partners. Strategies include prospect prioritization, cultivation and stewardship. | Jennifer Crabtree, Corporate Giving Manager and Alex Burnside, Corporate Giving Director, UW of Greenville County |
| 2 - Poinsett Ballroom | STATION 4 - 4:15-4:45PM | Grassroots Community Engagement - "Greenville Dreams" | This initiative connects neighborhood leaders with resources and information to build their leadership skills and social capital to better support their local communities. | Channing Banks, Corporate Giving Director and Nalisha Henry, VP of Community Impact, UW of Greenville County |
| 3 - Poinsett Ballroom | STATION 4 - 4:15-4:45PM | Volunteer Engagement | Learn about volunteer engagement strategies by aligning your work to the company Corporate Social Responsibility to increase impact in the community and generate new revenue for your organization. | Hope Collins, Corporate Giving Director, UW of Greenville County |
| 4 - Poinsett Ballroom | STATION 4 - 4:15-4:45PM | VITA Best Practices | Learn how the Volunteer Income Tax Assistance Program helps community members obtain all eligible deductions and how keeping more of their hard earned money supports financial stability. | Craig Shoemaker, Director of Financial Stability and Tiffany Bannister, VITA Program Coordinator, UW of Greenville County |

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| 5 - Poinsett Ballroom | STATION 4 - 4:15-4:45PM | Position your UW for the future | Don't wait another day to position your United Way to stay ahead of the curve! We'll show you how to overcome the challenges you are facing today by redirecting the purpose of your United Way. You will learn all about the Issue Focus Model for United Ways and how it will allow you to grow and diversify your revenue, measurably change lives in your community, simplify your message, and increase understanding of your work. You'll be inspired by examples from issue focused United Ways of all sizes that are relevant and sustainable now and for the future. | Gary Goscenski and Bryn Bogemann, Perspectives Consulting Group |
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