

UNITED WAY OF FLORIDA



CONFERENCE

ORLANDO FLORIDA 2013



CHANGES IN ATTITUDES,
WORKING ACROSS LATITUDES

PROGRAM



WYNDHAM ORLANDO RESORT



PROGRAM AT A GLANCE

	Wednesday, June 12	Thursday, June 13	Friday, June 14
Registration	3:30 PM-5:30 PM	7:30 AM- 8:30 AM Registration	
Knowledge Café		8:00 AM-5:00 PM	8:00 AM-2:00 PM
Morning		8:30-9:30 Breakfast/Opening Session	7:30-9:00 Breakfast/Opening Session
Afternoon		10:00-11:30 Session 1: Best Practices	9:15-10:45 Session 3: Working Horizontal
		11:45-1:00 Lunch/General Session	11:00-1:00 Lunch/Closing Session
		1:15-2:45 Session 2: Be Innovative!	1:00 Conference Concludes
Evening		3:00-5:00 Mobile Lab Poverty Simulation CPO Meeting	1:15 - 5:00 CPO Meeting
		6:00 PM-7:30 PM Welcome Reception	6:00 PM Dinner/Optional Group Activity

WEDNESDAY, JUNE 12

3:30 p.m. - 5:30 p.m. **Early Registration**

6:00 p.m. - 7:30 p.m. **Welcome Reception:**

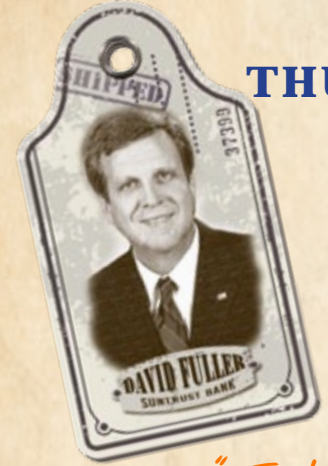
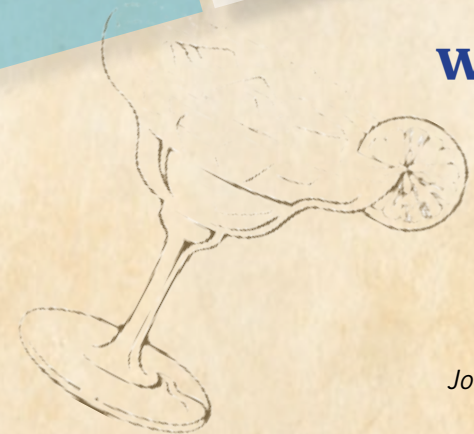
"Margaritaville"

Outdoor by the Pool

Join us for networking, cocktails, and appetizers.



I'm in Paradise



THURSDAY, JUNE 13

7:30 a.m. - 8:30 a.m.
Registration

8:30 a.m. - 9:30 a.m.
**Breakfast and
Opening Session**

**KEYNOTE SPEAKER:
David Fuller, SunTrust Bank**

"I Love the Now"

David Fuller is the Division President and Chief Executive Officer for SunTrust Bank, Central Florida. Mr. Fuller is responsible for the Central Florida Division, consisting of 151 offices with over \$12 billion in total deposits in 12 counties from Lakeland to Melbourne, and Daytona Beach to Leesburg. He is based in Orlando.

A career banker, Mr. Fuller began his banking career 27 years ago and joined SunTrust in 2004. Prior to assuming his current responsibilities in Central Florida, Mr. Fuller served as SunTrust's Line of Business Manager for Commercial Banking and the Treasury & Payment Solutions Division Head. In those roles, Mr. Fuller was responsible for the bank's strategy for commercial banking as well as leading treasury management services, commercial card services, merchant services, global trade, and business deposits/liquidity management. In June 2009, Mr. Fuller was recognized by Treasury and Risk Magazine as one of the 100 Most Influential People in Finance. Mr. Fuller earned his Bachelor of Business Administration and Master of Business Administration degrees from Baylor University. He is a permanent Certified Cash Manager with the Association for Financial Professionals and he has also earned his Series 7 and Series 63 licenses (both inactive).

Mr. Fuller serves on the Heart of Florida United Way Board of Directors, and the Metro Orlando Economic Development Commission Board of Directors and Governors Council.

BEST PRACTICES!

Mr. Fuller will present best practices SunTrust has used in working through their United Way campaign, with specific focus on their use of an on-line pledging system and how this can be an effective tool for engaging more donors in the work place.

10:00 a.m. - 11:30 a.m.

SESSION 1 - BEST PRACTICES

"Stories We Could Tell"

RESOURCE DEVELOPMENT

*It's Not WHAT You Know - It's WHO You Know
(and HOW much you know about them)*

Relationship management is crucial when working with past and prospective donors. After putting in all of the work during one campaign, what can you do to ensure you're not starting over year after year? This

session will focus on collecting the right information from year to year and strategies for using that information for the maximum benefit to engage your donors in a meaningful way. Topics to cover are using churn data effectively, working with government employees, saying thank you, and creating solid relationship management plans to produce results.

- Alison Dodson, United Way of the Big Bend - Government Employees/ Say Thank You
- Becky Bogle, United Way Worldwide - Churn
- Jim Yu, United Way Worldwide - Relationship Management

COLLECTIVE IMPACT

Early Literacy - Making the Grade

Research proves children who enter kindergarten ready to learn are more likely to graduate and become productive adults. Investment in early literacy is paramount to a student's success. Learn about successful reading programs and how you can implement these ideas in your community.

- Pat Cucci, Scholastic, Inc. - Summer Slide Program
- Courtenay Garcia, United Way of the Big Bend - ReadingPals
- Jan Hathaway, United Way of Marion County - ReadingPals
- Gladys Montes, United Way of Miami-Dade - United Way Center for Excellence in Education

MARKETING/COMMUNICATIONS

Size Doesn't Matter - How to Do More for Less

United Ways across Florida have marketing budgets that range from \$0 to \$10,000 plus. Size shouldn't matter - what you do with what you have is what is important. This session will present marketing plans using varying degrees of marketing dollars.

- Sachs Media Group

OPERATIONS/FINANCE

Keeping it on Track - Accountability and Reporting

The Operations department is the hub of all activity within a United Way. This area is often responsible for human resource functions, information technology, facilities management, pledge processing, and allocation disbursements. This session will discuss how to effectively ensure that campaigns, designations, and allocations criteria are met (Standard M, etc.), the NPC Policy, and where raised credit.

- Ken Euwema, United Way Worldwide

EXECUTIVE - CPO

Effectively Engaging Your Board is More Art than Science

An effective board serves an immensely practical role. It defines the nonprofit's mission, establishes priorities, crafts strategies, and ensures that plans and programs are implemented. Without a committed board to tackle these tasks, a nonprofit can quickly run adrift, without clear goals or any specific plans to achieve them. Whether a board member is more comfortable working behind the scenes or asking for money directly, there should be a way for the whole board to get involved.

- Eric Dewey, United Way of Metropolitan Nashville
- Margaret Dolan, Ingram Industries, UWMN Board Member



THURSDAY, JUNE 13

11:45a.m. - 1:00 p.m.
Lunch/General Session

KEYNOTE SPEAKER:

Robert D. Cabana, Director of the Kennedy Space Center

"Bend a Little"

After graduation from the United States Naval Academy in 1971, Mr. Cabana attended the Basic School in Quantico, Virginia and completed naval flight officer training in Pensacola in 1972. He served as an A-6 bombardier/navigator with Marine Air Wings in Cherry Point, North Carolina and Iwakuni, Japan. He graduated from the U.S. Naval Test Pilot School in 1981 and served at the Naval Air Test Center in Patuxent River, Maryland as the A-6 Program Manager, X-29 Advanced Technology Demonstrator Project Officer, and as a test pilot for flight systems and ordinance separation testing on A-6 and A-4 series aircraft. Prior to his selection as an astronaut candidate, he served as Assistant Operations Officer of Marine Aircraft Group Twelve in Iwakuni, Japan. Mr. Cabana retired from the U.S. Marine Corps in September 2000.

A veteran of four space flights, Mr. Cabana has logged more than 910 hours in space. He served as pilot on STS-41 (October 6 to October 10, 1990) and STS-53 (December 2 to December 9, 1992) and was mission commander on STS-65 (July 8 to July 23, 1994) and STS-88 (December 4 to December 15, 1998), the first International Space Station assembly mission. Mr. Cabana currently serves as Director of Kennedy Space Center, Florida.

BE INNOVATIVE!

With the end of the Space Shuttle program in 2011, the Kennedy Space Center has had to consider what its future will look like and what its new mission will be. Director Cabana will share with attendees what some of those changes are, what had to occur to implement the changes, and ways the space center has reinvented itself in the midst of economic difficulties.

1:15 p.m. - 2:45 p.m.
SESSION 2 - BE INNOVATIVE!

"FINS- Fresh Ideas, New Strategies"

RESOURCE DEVELOPMENT

Affinity Group Engagement

Targeted marketing to segments in your community can bring great success in both volunteer and donor engagement. This session will focus on successful programs initiated by three United Ways that have brought success in increasing their visibility in the community and attracting new leadership givers.



- Christina Criser, United Way of Central Florida – Young Leaders Society
- Sara McMillan, United Way of Northeast Florida - Women in Local Leadership
- Cassie Montes, United Way of the Suncoast - Bridges Program

COLLECTIVE IMPACT

Creative Solutions for Community Issues – Creating a Successful Impact Initiative

Creating a successful collective impact initiative is tough work. There are many options and models with proven success. Hear from four United Ways about ground breaking work being done in Florida.

- Penny Borgia, United Way of Central Florida - Data Integrated Monitoring & Evaluation System (DIME)
- Kasha Owers, United Way of Palm Beach County - Prosperity Program
- Kathleen Cannon, United Way of Broward County - Mission United
- Duggan Cooley, Pasco County - Mobile Health Lab

MARKETING/COMMUNICATIONS

E-Marketing – Are you using it effectively?

E-Marketing is the future of expansion for businesses and non profits alike, but not all non-profits effectively utilize this resource. This session will include e-marketing best practices, including how to craft succinct messages, how to select appropriate mediums for specific demographics for maximum impact, and how to track your impact.

- Tom Derzypolski, BowStern
- Peter VanRysdam, 352 Media

OPERATIONS/FINANCE

Thinking Out of the Box

Operations teams from around the state have shared that their group functions best when building secure collaborations with the community. This session will look at successful partnerships that have been forged within the United Way system regarding backroom operations and how some United Ways are doing back room operations for non-traditional partners in an effort to diversify their revenue streams.

- Ken Euwema, United Way Worldwide
- Carlos Molina, United Way of Miami-Dade
- Debbie Mason, United Way of North Central Florida

EXECUTIVE - CPO

Talent Management

Talent Management refers to the anticipation of required human capital an organization needs and then setting a plan to meet those needs. United Way is changing – do you have the talent to make those changes in your organization for the benefit to your community? This session will discuss: keeping your staff up when the campaign is down, taking a swim in the talent pool – do you have what you need?, and walking the plank – do you have a succession plan?

- Michael Wood, United Way Worldwide



3:00 - 5:00 p.m.

"Take Another Road"

OPTION 1: MOBILE LAB - PARRAMORE NEIGHBORHOOD

In June 2005, Orlando Mayor Buddy Dyer, District 5 City Commissioner Daisy W. Lynum, and Heart of Florida United Way launched Pathways for Parramore, a complete effort to revitalize Orlando's historic Parramore Heritage community which had become Orlando's most blighted community. With the additional implementation of Parramore Kidz Zone (PKZ), Orlando Mayor Buddy Dyer supports its mission to level the playing field for Parramore's children, equipping them to become successful, healthy, well-educated adults. Join this tour to see firsthand the power of stakeholders' input into this process.

**Spaces for this tour are limited.*

Option 2: POVERTY SIMULATION

The poverty simulation is a unique tool used to educate everyone about the day to day realities of life with a shortage of money and an abundance of stress. During a simulation, participants role-play the lives of low-income families, from single parents trying to care for their children to senior citizens trying to maintain their self sufficiency on Social Security. The task of each family is to provide food, shelter and other basic necessities during the simulation while interacting with various community resources.

**Requires a minimum of 30 participants.*

Option 3: CPO MEETING

6:00 PM

Dinner/Optional Group Activity

"It's Five o' Clock Somewhere"

FRIDAY, JUNE 14

7:30 - 9:00 a.m.

Breakfast/General Session

"It's My Job"

KEYNOTE SPEAKER:

Tim Kinane, VISTAGE Florida, Chairman

Tim Kinane is the Vistage CEO Peer-Group Chairman. Mr. Kinane's coaching clients include a broad variety of professionals, businesses, governments and not-for-profit organizations.



He works with CEOs, executives and business owners to help build and coach their teams. Mr. Kinane has more than 30 years of business experience ranging from publicly traded electronic manufacturers to a start up commercial printing operation. His expertise in operations, strategic planning and marketing led him to establish Real World Group, Inc. in 2000. He draws on these experiences and applies his own coaching approach to help clients explore and reach their goals.

Mr. Kinane has served as President of United Way of Martin County's Board of Directors, Past Chairman of the Stuart Martin County Chamber of Commerce, Past President of the Palm City Chamber of Commerce and LEADERShip Martin County, Founding Member of the St. Lucie River, and a Community Board Member of First National Bank and the Economic Council of Martin County.

WORKING HORIZONTAL

Community priorities and mobilization can be a scary concept for many organizations to grasp. Strategic planning can help harness these concepts, and create a direction for your organization, maximizing your options for influencing real change in your community. Tim Kinane will present his work with United Way of Martin County and their journey of strategic planning. Participants will learn about the important conversations UWs must have with their communities to determine their priorities and how to effectively mobilize volunteers and staff.

9:15 - 10:45 a.m.

SESSION 3: WORKING HORIZONTAL

"Bigger Than the Both of Us"

United Way Worldwide's movement to advance the common good by impacting our communities through focusing on education, income, and health has been gaining momentum for almost a decade. This movement has included four stages to help United Ways move towards collective action: Product Development, Strategic Mapping, Mobilization, and Partnerships. This session will present how one United Way engaged each department within their organization to move through each of these stages.

- Tish McCutchen, United Way Worldwide
- United Way of Broward County



FRIDAY, JUNE 14

11:00 a.m. - 1:00 p.m.
CLOSING SESSION/LUNCH

KEYNOTE SPEAKER: Stacey Stewart,
United Way America President

"Come Monday"



For the first time in decades, there is a new organizing framework for United Ways in the U.S. – the Business Performance Matrix. The Business Performance Matrix will replace the current Metro classification system and will help us:

- Better connect with United Ways with similar issues and learn from one another;

- Get differentiated and customized support and services that are more appropriate for our challenges – not only from United Way Worldwide but from state organizations, other local United Ways, and third parties;
- Do better planning and drive greater performance by understanding our strengths and challenges relative to others in our Matrix Segment and across the network.

Stacey Stewart will present this new model, discussing how this supports the continued momentum in our work to advance the common good.

1:15 – 5:00 P.M.
BOARD/CPO MEETING



UWOF Conference Committee

Alicia Casas	United Way of Volusia-Flagler Counties
Alison Dodson	United Way of the Big Bend
Amy Buckley	United Way Suncoast
Anna Maria Lewis	Heart of Florida United Way
Beth Meredith	United Way of Florida
Bronwyn Beightol	United Way of Manatee County
Caron Partridge	United Way of Brevard
Cassie Montes	United Way Suncoast
Christina Criser	United Way of Central Florida
Debbie Mason	United Way of North Central Florida
Donna Yarbrough	United Way Suncoast
Duggan Cooley	United Way of Pasco County
Heath Wells	Heart of Florida United Way
Heather Mitchell	United Way of the Big Bend
JahKiya Bell	Heart of Florida United Way
Jeannine Joy	United Way of Lee, Hendry, and Glades
Justin Beard	United Way of Martin County
Kate Cruikshank	United Way of the Big Bend
Lisa Iannizoto	United Way Suncoast
Marta Vargas	Heart of Florida United Way
Niki Paksoy	United Way Suncoast
Penny Borgia	United Way of Central Florida



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