



# A VOTE OF CONFIDENCE:

Increase Your Share of Donor Dollars with Workplace Giving

May 13, 2016 | The Pew Charitable Trusts' Conference Center | Washington, D.C.

## AGENDA

**8:30am** Breakfast and Networking

**9:30am** Welcome Address and Annual Member Meeting

*Review of the State of America's Charities and newly elected Board Directors, along with updates on the CFC, private sector, and workplace giving industry.*

**Presenters:**

- Marcia Bullard, Board Chair, America's Charities
- Steve Delfin, President and CEO, America's Charities

**10:00am** The Future of the CFC: The Nuts & Bolts of the Federal Government's Workplace Giving Program

*The CFC is the world's largest and most successfully organized annual workplace giving campaign for millions of Federal, Postal, and Military personnel. This session will address CFC changes and news, with time at the end reserved for members to ask questions and gain clarity on the future and influence of the CFC.*

**Moderators:**

- Steve Delfin, President and CEO, America's Charities
- Jeff Brown, Outreach and Engagement Manager, America's Charities

**Panelists:**

- Rama Latin, Charitable Campaigns Administrator at the Department of the Navy (DON)
- Keith Willingham, Director of the Combined Federal Campaign (CFC) at the U.S. Office of Personnel Management

**11:00am** Break

**11:15am** Megatrends: Their Impact on Your Organization

*Two years ago, Independent Sector (IS) embarked on a strategic visioning exercise that engaged national and local leaders from the governmental, philanthropic and for-profit sectors in an identification and examination of the external forces impacting philanthropy over the next 20 years. In this session, IS experts involved in this effort, will provide perspectives on what they learned and the potential impact on nonprofit organizations.*

**Moderator:**

- Steve Delfin, President and CEO, America's Charities

**Panelists:**

- Jeff Moore, VP of Strategy and Interim Co-CEO, Independent Sector
- Sampriti Ganguli, CEO, Arabella Advisors

Noon

Lunch

1:00pm  
Success

### Inside Look: How a Small Nonprofit Leveraged Workplace Giving to Become a Big

*Founded in 2001, learn how Dr. Mark Bergel started A Wider Circle and has successfully grown his organization to the 38,000 square-foot center it is today, furnishing the homes of more than 16,000 children and adults through the support of 50 staff, 15 university interns, more than 15,000 volunteers, and sustainable funds from workplace giving.*

**Presenter:**

- Dr. Mark Bergel, Founder and Executive Director, A Wider Circle

1:30pm

### Opportunities for Raising Your Visibility and Amping-up Donor Engagement

*Learn about our new partners, ways to raise your visibility in private sector campaigns, and discounts and opportunities exclusively available to America's Charities members.*

**Presented by America's Charities team:**

- Jim Starr, COO and Chief Business Development Officer
- Robyn Neal, Vice President, Client Engagement Solutions
- Roseanne Wark, Outreach and Engagement Manager, Client Engagement Solutions
- Lindsay Nichols, Vice President, Marketing and Communications
- Sarah Ford, Marketing Manager, Marketing and Communications
- Emily Bernhards, Project Manager, Client Engagement Solutions

2:30pm

### Closing Remarks

**Presenter:**

- Jim Starr, COO and Chief Business Development Officer, America's Charities

2:45pm

### Small Group Discussions with Peers and America's Charities Staff

*Join us for some 1-on-1 conversations with America's Charities staff, particularly for information about funds management, reports, marketing and advertising, member applications and more!*

\*\*\*

### Share your feedback:

Please take a moment to complete the Membership Assembly Survey. You can complete the printout, which has been included with today's packet, or you can share your feedback online at <https://www.surveymonkey.com/r/2016membershassembly>.

**Thank you!**