

State Leaders Conference



United Way... Rediscovered!



*April 13, 2010
Hilton Indianapolis North*

2010 Indiana United Ways State Leaders Conference

Registration: 8:30 to 9:00 AM

Pick up materials at the Indiana Nonprofit Resource Network (INRN) and Nonprofit Processing & Accounting (NPAS) booths. INRN Regional directors are available throughout the day program to discuss training needs.



Opening Session: 9:00 to 10:00 AM

Welcome and Remarks: Maria Pantaleo, IaUW Board Chair, Howard County; and Duane Hoak, Conference Chair, Madison County

Keynote Speaker: *Steve Willis, VitalSmarts, Utah*



Topic: *The Influencer: The Power to Change Anything*

Do you want to create sustainable change? Hear about an exciting, inspiring, easy-to-understand model that some have called "a perfect fit" for community impact strategy development. Most chronic issues resist our best solutions because we are not using our *sources of influence* well. Hear an introduction to cracking the code of human influence. Apply a personal and organizational leadership development process that empowers others to create breakthroughs in their lives and organizations. Learn how to improve your ability to explore and select coordinated well-chosen strategies to change behavior. Learn about tapping high-leverage behaviors. Follow the experiences of influence masters to create a powerful model for changing behavior.

See how this award-winning approach can work for you.

Strategy & Skill Track	Leader Track	Resource Development & Agency Investments Track	Tactical & Intensive Track
1. The Influencer: The Power to Change Anything	2. The New Volunteer Leader	3. Transformations: Evaluating & Improving Agency Capacity	4. Advancing the Common Good, Live United Introduction
5. Making Extraordinary CEO Calls!	6. Fresh Approaches to Recognizing Staff & Volunteers-Not Optional!	7. Double-Take: Finding Donors, Keeping Donors	8 and 12. Name That Tune: Matching Strategies, Products and Investors for Long-Term Education, Income, Health Goals. (2-part-mini-intro course)
9. New-Fangled Geek-Talk: Facebook, You-Tube, Texting, Blogs, Twitter, I-Phones, and More	10. Altered Realities: Advancing the Common Good in Tough Times	11. Fundraising Redefined: Resource Development Basics & Relationship Building	

Break: 10:00 to 10:20 AM

Breakout Sessions: 10:20 to 11:40 AM

1. The Influencer: The Power to Change Anything

Presenter: *Steve Willis, Vital Smarts, UT*

Continuing the keynote's introduction to *The Influencer*, discuss and explore more of the model and sources of influence. Some highly successful examples include: thousands of hardened criminals and drug addicts change their lives forever; communities dramatically reduce violence against women; and the secrets to weight loss are available to anyone. Practice using an introductory version of the model and take home new insights about addressing society's most challenging issues. Just knowing how to look at an issue gives a huge advantage. Find out why.



2. The New Volunteer Leader

Presenters: *Jim Stapleton, Owner, GuidePoint Financial Group, and Scot Quintel, United Way of Whitewater Valley, and TBA*

What are the keys to being a leader today? Strengthen your ability to lead in challenging times and do the new work of United Ways. Lead rich board conversations about moving forward, mixing flexibility with insightful thinking while being true to your mission and goals. Learn to make even better strategic decisions with a few simple techniques. Discuss how to tap the skills and interests of volunteers around you and use them well. Be the *Ambassador of the Century* and enjoy every minute. Share your passion for the cause.

3. Transformations: Evaluating & Improving Agency Capacity

Presenter: *Kim Donahue, United Way of Central Indiana*

Go beyond basic monitoring and being accountable to donors. UW of Central Indiana has developed a model for evaluating agencies and coordinating programs for capacity building. See how you can help agencies to assess where improvement is needed. Explore the benefits of supporting the agencies you most need/want to do the best work possible. Learn how you can apply the model for your agencies' capacities. Discuss lessons learned. Take home great ideas on many resources available to help with capacity building for little or no cost.

United Way...Rediscovered

4. Advancing the Common Good, Live United Introduction

Featured Presenter, Intensive Track: Barbara Edmond, Vice President, Best Practice Exchange, United Way Worldwide



Hear an overview of new messaging, including Education, Income (financial stability), and Health issue areas, the *Give, Advocate*, and *Volunteer* opportunities and why these messages and tools help investors "Live United." Discover great uses of "Live United" by taking it to the next level. It's more than a T-shirt!

Participants will receive a "UW 101" handout for broader background. This session provides a frame for the work, what is possible with the broad issue areas, (the "What" for the intensive track). The afternoon intensive moves into a "How" and "Why" conversation and intro to Product Development.

GEM Awards Luncheon & Annual Meeting: 11:40 AM to 1:30 PM

Emcee: Barry Lessow, Monroe County

Find your friends, partners, and co-workers, or make a new friend, for informal lunch conversation. Then, we'll honor the 2009 GEM (Golden Excellence in Media) Communications contest winners in many categories and the three overall GEM winners. Entry samples will be displayed after the award ceremony. Following the awards, join us for IaUW's brief annual meeting.



Rob Mackey, Small Cities Director, Field Leadership, United Way Worldwide, will be our guest all day with a reserved table at lunch and open networking time during the reception and banquet.

Break: 1:30 to 1:45 PM

Breakout Sessions: 1:45 to 3:15 PM

*"We are more than the sum of our knowledge,
we are the products of our imagination."
~ Native American Proverb*

5. Making Extraordinary CEO Calls!

Presenters: Henry Bird, Publisher, Anderson Herald Bulletin, and Pat Coy, United Way of Kosciusko County

Why are CEO Calls a vital relationship building skill and a core best practice for fundraising success? Why does the effort pay off? Discuss how to time your calls for top results. Learn strategies to match up the right volunteers with the right calls. Hear examples to rediscover and promote the new UW in your CEO calls. This session will include hands-on practice and time to strategize for local applications.

6. Fresh Approaches to Recognizing Staff & Volunteers-Not Optional!

Presenter: Mary Kay Hood, Director of Volunteer Services, Hendricks Community Hospital

Effective recognition is so important! It's the #1 reason people leave – so make sure they stay! Learn what it does for your organization, managers, and leaders and why it's essential. Take-home easy, quick, and fun ideas. Learn how to recognize different people, including young professionals who have different feedback needs and preferences. Share your volunteer recognition successes with hands-on idea time.



7. Double-Take: Finding Donors, Keeping Donors

Facilitator: Gary Goscenski, Perspectives Consulting, Michigan

Gary brings fascinating information that will spark discussion and encourage new thinking. Discover how to attract donors to your UW and then how to keep them. The reasons people give, or not, have changed! Learn more about prospective donors so you can engage them. Discuss strategies including Internet use. Learn about why communicating impact is essential. Participate in lively discussion. See recent data from the Midwest; discuss its importance and how you might use it. Be ready to be surprised.



8. Name That Tune: Matching Strategies, Products, and Investors for Long Term Education, Income, & Health Goals

Presenter: Barbara Edmond, Vice President, Best Practice Exchange, United Way Worldwide (Intensive mini-course, cont'd in session 12)

Do you want to make sense of strategy development, products, alignment, and funding decisions? This introductory session will help get you on the right track and show where Live United can really come alive. Discuss how to get from your local priorities to UWW's suggested long-term benchmarks, or not? Find out why developing your best strategies is the most important part of the whole process. Learn the difference between your strategies and products to promote to prospective investors.

Improve your fundraising beyond the traditional workplace campaign. Discuss how to frame your community impact strategies so you can identify your ideal products. See Indiana product examples described in compelling ways to appeal to local donors. Once your products are well developed, learn to match local products to your donor's interests and aspirations. Step back and see how this creates long-term loyal investors who Live United. Finally, briefly consider the pitfalls of jumping the gun in aligning funds without having clearly defined local priorities. Discuss how basic needs support fits into the big picture.

[Breakout Sessions continued on back page](#)

United Way...Rediscovered, April 13, 2010

Break: 3:15 to 3:30 PM

Breakout Sessions: 3:30 to 5:00 PM

9. New-Fangled Geek-Talk: Facebook, You-Tube, Texting, Blogs, Twitter, I-Phones and More



Presenter: Laura Edwards, Director of Development, Purdue University

This topic is back by popular demand, with a new speaker! What are we learning now about social networking? It's "out there" even more than ever! What are e-cards and other emerging tools? Reach and involve youth and others through newer technologies. Apply strategies to donors, volunteers, staff, and community outreach. What are the emerging successes? What's the opportunity for nonprofits? Why should UWs take the time to use social networking tools? How are some handling the extra work? Leave with advice for using social media tools in your community.



10. Altered Realities: Advancing the Common Good in Tough Times

Presenters: Tim Clark, Henry County United Fund, and TBA

How did UWs handle the recession and '09 distributions/community investments strategically? What are plans/progress for '10 distributions and community investments? Make strategic budget decisions without losing sight of your long-term goals. See examples and join in discussion. Reflect on the opportunities and challenges that uncertain times bring.

11. Fundraising Redefined: Resource Development Basics & Relationship Building

Presenters: Bumper Hostetter, Vincennes University Foundation and, Becki Rucker, Metro United Way, New Albany

Participate in a lively session applying relationship building to reach different markets and different donor types. Increase your "new donor" engagement. Have fun and practice using solid relationship-building strategies.

Find new donors outside the workplace. Focus on high net-worth donors, leadership givers, targeting youth, young professionals, women, and other key markets. Discuss ways to reach and engage each market. Increase your "new donor" engagement. Have fun and practice using solid relationship-building strategies.

"It's about the journey—mine and yours—and the lives we can touch, the legacy we can leave, and the world we can change for the better."

~ Tony Dungy, Quiet Strength

12. Name that Tune: Matching Strategies, Products and Investors for Long Term Education, Income, & Health Goals (Intensive mini-course, cont'd from session 8)

Presenter: Barbara Edmond, Vice President, Best Practice Exchange, United Way Worldwide

Volunteers of the Year Reception: 5:00 to 6:00 PM

Join us for refreshments while Volunteers of the Year are welcomed and pictures are taken. If you have a Volunteer of the Year joining you at the reception, be sure he or she is checked in and has a picture taken with your local leaders. Enjoy our popular magician, C.R. Ryan, and his young son, Braden, while you mingle and gather with friends.



Volunteers of the Year Banquet: 6:00 to 8:00 PM

Emcees: Maria Pantaleo, Howard County, and Duane Hoak, Madison County

Enjoy a fine meal followed by our favorite time to honor volunteers from all over the state for their innovations, inspirations turned into reality, and many leadership qualities. The evening will close with recognition of the state's top honor, the Castaldi Award, named after the Indiana Association of United Ways founding board chair, Lawrence Castaldi.

Thank you, Mutual of America, the generous Volunteer of the Year Awards sponsor, supporting volunteers as they Live United!

2010 State Leaders Conference Committee

Conference Chair: Dr. Duane Hoak, Madison County; Alan Burns, UWCI; Carol Braden-Clarke, Southwestern IN; Duane Chattin, Knox County; Jenny Dennis, Henry County; Kimberly Donahue, INRN-Central Region; Frances Ganaway, Allen County; Sally Jamerson, Bartholomew County; Sharon Kish, Porter County; Jillian Miller, INRN Western Region; Bob Murawski, Knox County; Ruth Ann Rebber, Jackson County; Arthur Spriggs, Shelby County; Nancy Vaughan, Madison County; IaUW staff: Lisa Hanger, Iverne Russell

Register and find all information online at www.iauww.org. For questions, contact Lisa Hanger at lisa.hanger@iauww.org or 800-457-1450 x119 or Iverne Russell at x117, iverne.russell@iauww.org.