

State Leaders Conference

Connecting People with their Passions

One tweet/text/e-mail/keystroke/handshake, at a time!



*March 10, 2011
Hilton Indianapolis North*

2011 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: Ron Silverman, IaUW Board Chair, St. Joseph County; and Duane Chattin, Conference Chair, Knox County

Keynote Speaker: Ryan Davis

Topic: Social Media—Priorities, Practices, and People Power



Blue State Digital is assisting United Way Worldwide with their social media strategy. BSD is also working with local United Ways of all sizes, helping them make the best use of their staff time and other capacities.

Davis will give an overview of the three most talked about new media elements: Email (including e-newsletters), Facebook, and Twitter, noting how each is best used. If you only have one priority vehicle, what should it be and how should you use it?

Ryan will be joined by Nickie Titus, Strategic Development Manager. Both will be available throughout the day to answer questions. Watch for more details about how to connect with them at lunch and other ways.

Board & Stakeholder Roles Track	Build Strategies & Measure Results Track	Mobilize Resources Track	Communicate Results & Intensive Track
1. The Board's Role in Education, Income, & Health Issue Areas	2. Moving the Needle: Developing Clear & Strong Community-Level Outcomes	3. Relationship Management is Priority #1! Growing Deeper Donor Relationship	4. Board Leadership in Crafting & Delivering Your Most Powerful Messages
5. The Road Less Traveled: Shifting Funding Patterns Without Pain!	6. Board's Role in Building Strategies for Long-Term Results	7. Mobilizing Resources, Tapping Donor Passions with Product Development	8 and 12. Empowerment through Crucial Conversations <i>(2-part session)</i>
9. Linked by Heart: Building Partnerships with Agencies to Advance the Common Good	10. Megabytes: What Education, Income, Health Areas Can Do for You and Your Community	11. The Ultimate Connection: Individual Engagement	

Break: 10:00 to 10:20 AM

Breakout Sessions: 10:20 to 11:40 AM

1. The Board's Role in Education, Income, & Health Issue Areas

Presenter: Bill Kitson, President & CEO, and Traci Jadlos, Impact Director, UW of Greater Toledo; and Rick Davis, Board Chair, Greater Lafayette

Start with learning 6 signs your board is ready to address community issues and broad issue areas. What's the goal? How could it work? Practice steps to engage stakeholders, consider possible long-term goals, prioritize issue areas and strategies. Understand national priorities for each issue area and how they can help with local efforts. Why are national priorities important? Participants also receive a United Way 101 supplemental packet.

2. Moving the Needle: Developing Clear & Strong Community-Level Outcomes

Presenters: Bob Cross, Director, Research and Planning, Central Indiana

Are you making measureable change in your community? How do you know? Discuss the difference between program-level outcomes and community-level outcomes. What are the factors for long-term success? Let's make it simple. Learn easy ways to use the 'Theory of Change' model for community initiative outcomes. Understand what it means to "move-the-needle" toward a long-term goal. See 2 issue area examples for both outcome types. See why defining clear outcomes, first, makes all the difference in selecting your strategies. Use solid data but discover the role of reality-checks when you decide what to measure.

3. Relationship Management is Priority # 1! Growing Deeper Donor Relationships

Featured Presenter: Jim Yu, Vice President for Relationship Management & Brand Leadership, United Way Worldwide; Joyce Mayhill, Executive Director, Cass County

One-on-one donor relationships are vital for United Way's future. Find out why and how to get started. Indiana UWs (including a 4-UW collaborative!) participated in the comprehensive customer relationship management (RM) certification training and Learning Circles. What's already working to reach donors 1 on 1? Find out how to help build a deeper donor base. Hear an example of the "Stop-Start-More-Less" strategy to help make more time for this important work.



Connecting People with their Passions

4. Board Leadership in Crafting and Delivering Your Most Powerful Messages.

Presenters: Nancy Vaughan, Executive Director and Jan Kaye, Community Impact Chair, Madison County

Donors want to hear results! Answer their top question: "How have you used my money?" Then take a look at your other messaging. Have you defined the results you really want? Are you sharing a variety of successes while emphasizing an overall strong message that is consistent throughout all you do? Are you reaching donors with special efforts to draw interest from many angles?

Ensure you have real results or progress to share. Whom to tell what? How can your board approach the conversation? Learn from a community that re-positioned and re-built their campaign after major industry downsizing using few funds, major partners, and an Impact and Issue Area focus.

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

Emcee: Arthur Spriggs, Executive Director, Shelby County

Note **three options** for lunch networking! 1. Join a table labeled Education, Income (Financial Stability), or Health, or 2. Gather with our Blue State Digital guests and learn even more, or 3. Find your friends, partners, and co-workers, or make a new friend for informal lunch conversation.

Then, we'll honor the 2011 GEM (Golden Excellence in Media) Communications contest winners and unveil the three overall GEM winners. Entry samples will be displayed after the award ceremony near the registration table. Following the awards, join us for laUW's brief annual meeting.



Break: 1:30 to 1:45 PM

Breakout Sessions: 1:45 to 3:15 PM

"I always wondered why somebody didn't do something about that; then I realized I was somebody." ~ Lily Tomlin

5. The Road Less Traveled: Shifting Funding Patterns Without Pain!

Presenters: Pat Coy, Executive Director, Kosciusko County; and Jenny Dennis, Executive Director, Henry County

Adjusting your sails? Every United Way is making some changes due to the economy or long-term strategic reasons. Explore why/how/when to make changes. What are some typical funding progressions as UW's priorities change? Understand volunteer's perspectives on any funding change. Engage in hands-on practice with a simple tool to envision possibilities while respecting basic services using an Education Issue example. Prepare for realities of agency reactions and creating positive dialogue. Achieve a new ease with agencies so you can embrace new ideas. Leave with principles and practical steps with clear examples that will take you from now to "next"!

6. The Board's Leadership Role in and Building Strategies for Long-Term Results

Presenter: Melissa Schmidt, Director of Community Impact, Southwestern Indiana

Strong well-designed strategies lead to real change as well as real "products" to attract strong investors. Hear examples about the board's leadership role in defining the direction. What makes a good strategy? What are good community-level strategies? Discuss common strategy blunders. Take home solid examples and checklists. Apply principles and steps to local initiatives. See why it's important to craft and weave a variety of strategies to "move-the-needle" toward a long-term goal and connect the work to community level outcomes.

7. Mobilizing Resources and Tapping Donor Passions with Product Development Strategies

Featured Presenter: Louise Kenny, CFRE, Director for Individual Giving, United Way Worldwide; and Marcy Yoder, Vice President for Community Relations, Allen County

Do you want to use your best impact strategies to connect with donors? Create a stronger, more loyal basis for donor involvement? Get a quick overview of The Product Development Model—*simplified!* Understand the Product Development Ladder and see examples of how donors can connect at various stages as volunteers, advocates, various forms of giving. See how to frame strategies as investment products. What are vital turning points? How do EIH priorities fit in? What's the board's role in engaging donors with "products"?

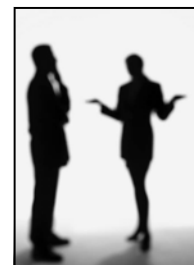
8 & 12. Empowerment through Crucial Conversations *(Intensive mini-course, cont'd in session 12)*

Presenter: June Miller, Regional Director, Indiana Nonprofit Resource Network-South, Southwestern Indiana

Are there areas of your life where you feel "stuck"? Are there situations in your work with other staff or volunteers in the areas of performance or improvement where you are not getting the results you hope for? We've all been there: *A partner agreement is stalled. A key volunteer is behind on responsibilities. You really want to give a colleague feedback about his/her behavior.* Take heart!

Research shows that you may be "stuck" because of one or two crucial conversations you are **not** having or you are not having well. A "crucial conversation" is a conversation when the stakes are high, opinions vary, and emotions are strong.

Get **Unstuck!** Achieve spirited dialogue, surface best ideas, make high quality decisions. Build acceptance not resistance. Enhance relationships, speak persuasively not abrasively. Foster teamwork. Practice an award-winning model. Use the skills at home and in any workplace setting. Don't put off delicate or challenging dialogue any longer. This model is a terrific compliment to The Influencer model or all by itself.



[Breakout Sessions continued on back page](#)

Break: 3:15 to 3:30 PM

Breakout Sessions: 3:30 to 5:00 PM

9. Linked by Heart: Building Partnerships with Agencies to Advance the Common Good

Presenter: Carol Braden-Clarke, President, Southwestern Indiana

Once board decisions are made about future directions, it's time to talk turkey with your agencies. How do you discuss new priorities with agencies/partners? What's a good process? How much time is reasonable to allow for real change to get underway? What kinds of conversations and preparation will help things go smoothly? Hear an example that involved 5 major shifts and achieved solid buy-in along the way. Leave with clear examples and tips.

10. Megabytes: What Education, Income, & Health Issue Areas Can Do for You and Your Community

Presenters: Bill Kitson, President, and Traci Jadlos, Director of Community Impact, UW of Greater Toledo

What's the big picture with Education, Income, Health Issue Areas? Building on the overview in session 1, consider how to use the issue areas effectively to make strong statements about long-term goals. Learn why the opportunity is far greater than putting existing programs in "EIH buckets." Work with a continuum from basic services to long-term change strategies. Discuss how to get started and maximize your efforts.

11. The Ultimate Connection: Individual Engagement

Featured Presenter: Louise Kenny, CFRE, Director for Individual Giving, United Way Worldwide; and Alan Witchey, Director, Volunteer Center, Central Indiana

Building on sessions 3 & 7 (or as a stand-alone session), hear practical steps to help deepen your donor relationships. Two outcomes are needed to achieve national goals in 2018. 1) **Individuals Mobilized** around the issue (more people with passion), and, 2) **Individuals Connected** with United Ways, creating: more donors, advocates, volunteers. Strategies suggested over 3 years target inside or outside the workplace. Address immediate results; build long-term foundations. Together, strategies will help retain "at-risk" donors, win back lapsed donors, and recruit new donors. Move beyond low-touch volunteer experiences to deeper ones. Learn about "Hand-raisers" and ways to make the most of your Education, Income, or Health Initiatives. Participate in a lively session applying relationship building to reach all market niches. Have fun while practicing solid relationship-building strategies.

12. Maximizing Teamwork and More through Crucial Conversations *(Intensive mini-course, cont'd from session # 8)*

"The most important single ingredient in the formula of success is knowing how to get along with people."
~ Theodore Roosevelt

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 favorite harpist, Jennifer Midkiff, while you mingle and gather with friends.



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

Emcees: Ron Silverman, Board Chair, St. Joseph County, and Duane Chattin, Conference Chair, Knox 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,
our generous Volunteer of the Year

2011 State Leaders Conference Committee

Conference Chair: Duane Chattin, Knox County; Nancy Anderson, Madison County; Pamela Beckford, Wells County; Alan Burns, Central Indiana; Carol Braden-Clarke, Southwestern IN; Tonja Couch, Jackson County; Jenny Dennis, Henry County; Kimberly Donahue, INRN-Central Region; David English, Putnam County; Frances Ganaway, Allen County; Duane Hoak, Madison County; Sharon Kish, Porter County; Jillian Miller, INRN Western Region; Bob Murawski, Knox County; Arthur Spriggs, Shelby County; IaUW staff: Lisa Hanger, Iverne Russell