



THE MONUMENT GROUP



United Way of Greater  
Richmond & Petersburg



THE FEDERAL RESERVE BANK OF RICHMOND  
RICHMOND ■ BALTIMORE ■ CHARLOTTE

***Sharing Services to Build a Stronger Nonprofit Organization***  
**Part of the Federal Reserve Bank of Richmond's Nonprofit Capacity Building Series**  
**Federal Reserve Bank of Richmond**  
**701 East Byrd Street, Richmond, VA**

**June 8, 2012**  
**8:30 am – 2:30 pm**

**AGENDA**

**8:30 am Registration**

**9:00 Welcome from the Federal Reserve Bank of Richmond**

- Kimberly Zeuli, Vice President and Community Development Officer
- Sally Green, Chief Operating Officer

**9:10 Introduction of the Program – “The New Normal”**

In an increasingly competitive funding climate, nonprofit organizations are looking to maximize their operational capacity. How are they doing it and what systems and strategies are emerging? Hear from an experienced nonprofit funder about what is trending in nonprofit services and what funders are seeing in this arena.

- Heather Turbyne-Pollard, Vice President of Community Impact, United Way of Greater Richmond and Petersburg

**9:30 Who Shares Services?**

Hear from a panel of organizations who are sharing services with other nonprofit organizations. This group of experienced nonprofit leaders proactively adapted their models to achieve cost-effective shared services including shared programming, shared space, and shared professional services.

Moderated by Heather Turbyne-Pollard, Vice President of Community Impact, United Way of Greater Richmond and Petersburg

- **Shared Programming and Direct Services.** Mark Morrison, Vice President of Development, Presbyterian Homes and Family Services and the Family Alliance

- **Shared Space and Direct Services.** Roy Peters, Chief Financial Officer, FeedMore
- **Shared Program Development.** Karen Stanley, Executive Director, CARITAS & The Healing Place
- **Shared Back Office Support.** Bill Jones, Chief Financial Officer, Family Lifeline

**10:30 Foundation Leadership! What it means for Collaboration and Targeted Investment**

Maximizing dollars and measuring impact is as important to funders as it is to nonprofit organizations. How are the thought leaders in the foundation world innovating to maximize impact and efficiency? Hear about some of the latest strategies and initiatives coming from the Ford Foundation and its nonprofit partners who are testing a framework for collaboration and targeted investment.

- **Deb Markley**, Managing Director, Center for Rural Entrepreneurship

**11:00 Coffee Break**

**11:10 Mergers and Acquisitions in the Nonprofit World**

What do Boards of Directors and nonprofit CEOs talk about when they are in stages of growth, change and struggle? Let's put them on both sides of the room and hear from organizations that have successfully merged. In this moderated discussion you will learn about their processes, successes and growing pains. Listen to the leaders and their advisors talk about the stage of development they are in now and how the post-merger life is suiting their mission.

- Moderated by Jen Giovannitti, Regional Community Development Manager, Federal Reserve Bank of Richmond and Claiborne Mason, Owner, C. S. Mason Consulting

**Nonprofit Chief Executive Officers**

- **Bob Dendy**, Chief Executive Officer, Presbyterian Homes and Family Services (PHFS) and the Family Alliance. In 2010, PHFS merged with the Family Alliance so they could better meet the needs of children, adults and families in Virginia.
- **Fay Lohr**, Chief Executive Officer, FeedMore, Inc. FeedMore is the umbrella organization that brings together the Central Virginia Food Bank, Meals on Wheels Serving Central Virginia and the Community Kitchen helping to deliver operational efficiencies and increase feeding capacity and meal quality.
- **Amy Strite**, President and Chief Executive Officer, Family Lifeline and Children's Health Involving Parents (CHIP). Merging with CHIP in January 2011, the new Family Lifeline has become the largest provider of intensive home-based services in Central Virginia.
- **Melissa Hough**, President & Chief Executive Officer, Partnership for Nonprofit Excellence. Formed in 2006, the Partnership leads collaboration among four partner programs including Nonprofit Learning Point, HandsOn Greater Richmond, ConnectVA, and Consulting Solutions – all dedicated to helping strengthen the nonprofit sector.

## **The Nonprofit Change Leaders - Board Members and Volunteers**

Board leadership is critical to making decisions about the future of the organization, assessing efficiency, and considering a mergers or acquisition. Hear from the skilled volunteer leaders who have served on many boards that have taken proactive steps to sharing services and creating a new vision for the organization. How did they assess the organization's culture and management, determine the right fit for the organization and suggest change?

- **Jeffrey Wilt**, Principal and Founder, The Monument Group. For more than 25 years, Jeffrey has helped nonprofits grow in ways that allow them to fulfill their missions.
- **Patte Koval** is a community activist who is passionate about creating and strengthening sustainable collaborations among community partners to build the capacity of residents to be successful.
- **Katherine Whitney**, Co-founder and Director, Warren Whitney. Katherine has over 25 years of helping nonprofit organizations reach their potential.

**12:30 pm**      **Break for Lunch**

**1:00**            **The Funders Roundtable**

This is the big picture discussion from funders on the role and importance of strategic collaboration. What is the global perspective from granting organizations on how organizations are making an impact across the system? How are organizations that are merging and sharing services being viewed by funders? How are funders collaborating among themselves in ways that they have not previously?

Moderated by Deb Markley, Managing Director, Center for Rural Entrepreneurship

- **Heather Turbyne-Pollard**, Vice President of Community Impact, United Way of Greater Richmond and Petersburg
- **Susan Hallett**, Vice President of Programs, The Community Foundation
- **Valerie Liggins**, Program Officer, The Cameron Foundation
- **Kathryn Strawn**, Vice President and Executive Director, MeadWestvaco Foundation
- **Sandra Mikush**, Deputy Director, Mary Reynolds Babcock Foundation

**2:20**            **Closing Remarks**

- Jen Giovannitti, Regional Community Development Manager, Federal Reserve Bank of Richmond
- Heather Turbyne-Pollard, Vice President of Community Impact, United Way of Greater Richmond and Petersburg

**2:30**            **Adjourn**