



Strategic Leadership Conference

www.2020strategic.com

*October 25, 2023
Muhammad Ali Center
#20twentySLC*



***A Clear Vision for Education
& Nonprofit Success***

STRATEGIC LEADERSHIP CONFERENCE

Content

| | |
|----|-----------------------|
| 03 | ABOUT20/twenty |
| 04 | MEET THE TEAM |
| 05 | AGENDA |
| 06 | BREAKOUT SCHEDULE |
| 07 | KEYNOTE PRESENTATIONS |
| 09 | FUND DEVELOPMENT |
| 11 | BOARD GOVERNANCE |
| 13 | NONPROFIT LEADERSHIP |
| 15 | AFTER THE CONFERENCE |
| 16 | THANK YOU |



At 20/twenty, our motto is **“We help people, that help people.”** It is our passion and calling to support and empower nonprofit leaders to maximize the impact of their missions in their communities. We accomplish this by embedding our team of expert nonprofit professionals into organizations that have expressed desire and commitment to become financially and organizationally excellent. 20/twenty offers a comprehensive suite of services, including fund development, grant writing, strategic planning, recruiting, DE&I training, and more.

We take a holistic approach with our dynamic team to customize a solution to meet your unique needs.



Meet the **TEAM**



Carl L. Williams Sr.
Founder,
President & CEO



Rebecca Day
Director
Administrative
Services



Victor Keye
VP of Client
Development



Sarah Burnett
Senior
Consultant



Josh Burnett
Senior
Consultant



Michael Duke
Senior Recruiting
Advisor



Edie Wooten
Director of
Grants &
Foundation
Partnerships



Ideisha Bellamy
Leadership
Consultant



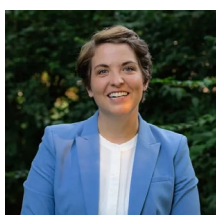
Ian Williams
VP of Client
Success



Aaron Thomas
Fund Development
Consultant



Amy Quiggins
Fund Development
Consultant



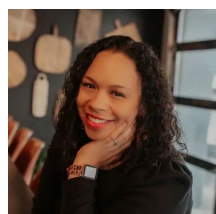
Josie Raymond
Fund
Development
Consultant



Lynn Huffman
Grant Writing
& Fund
Development
Consultant



Jenny Von Gerlachter
Grant Writing
Consultant



Lauren Muir
Grant Writing
Consultant



Terri A. Hill
Major Gift,
Fund Development
Consultant



Toni Clem
Leadership
Development
Consultant

AGENDA



7:45 AM | Breakfast & Networking | *View Pointe Hall*



8:15 AM | Panel Discuss on Sustainability | *View Pointe Hall*



9:30 AM | Breakout Session 1



10:45 AM | Breakout Session 2



11:45 AM | Lunch, Sponsors, Networking | *View Pointe Hall*



12:15-12:30 PM | Sponsor Presentations | *View Pointe Hall*



12:45 PM | Breakout Session 3



2:00 PM | Breakout Session 4



3:15 PM | Closing Keynote Joan Garry | *View Pointe Hall*



4:15 PM | Complete Conference Survey | *Email*



5:00 PM | Offsite Networking | *Jockey Silks Great Room*



THANK YOU.

BREAKOUT SCHEDULE

Breakout Session 1 – 9:30-10:30 am

Auditorium – NONPROFIT LEADERSHIP

"Stewarding Relationships for the Greatest Impact"

by Jennifer Hancock, President & CEO of Volunteers of America (VOA) Mid-States

Classroom 1 – BOARD GOVERNANCE

"Myths, Barriers, & Strategies for Board Diversity & Inclusion"

by Ideisha Bellamy, CEO & Principal Consultant of Bellamy Business Insights LLC

Classroom 2 – FUND DEVELOPMENT

"Designing Your Program for Grant Success"

by Becky Morris, Director of Grants at VOA Mid-States

Breakout Session 2 – 10:45-11:45 am

Auditorium – NONPROFIT LEADERSHIP

"Check Yourself Before You Wreck Yourself" - Navigating Personal Biases & Fostering Inclusion at Work

by Cherena Fox & Keionna Baker, Co-Founders of The Elephant in the Room

Classroom 1 – BOARD GOVERNANCE

"Charting Your Course: How to Prepare for Your Next Strategic Plan"

by Dr. Josh Kornberg, Executive Director of the Caesars Foundation of Floyd County

Classroom 2 – FUND DEVELOPMENT

"The Power of Peer-to-Peer Fundraising"

by Christina Miller, Director of Marketing & Communications at Community Foundation of Louisville

Breakout Session 3 – 12:45-1:45 pm

Auditorium – FUND DEVELOPMENT

"The Non-Profit World: What I've Learned"

by Jeremy Jarvi, Executive Director of LouCity and Racing Foundation

Classroom 1 – BOARD GOVERNANCE

"Facilitating a Board Retreat"

by Wendy Dant Chesser, President & CEO of One Southern Indiana

Classroom 2 – NONPROFIT LEADERSHIP

"The Lasting Advantage: Inspire, Connect & Make a Difference Anytime Anywhere"

by Ian Williams, Co-Founder & President of Lead Well Strategic Consulting

Breakout Session 4 – 2:00-3:00 pm

Auditorium - NONPROFIT LEADERSHIP

"Creating an Engaged Workforce"

by Molley Ricketts, CEO & Founder of Incipio Workforce Solutions & UnicusPar

Classroom 1 – BOARD GOVERNANCE

"Supercharge your Board for Sustainability"

by Carl L. Williams Sr. Founder, President & CEO of 20/twenty Strategic Consultants

Classroom 2 – FUND DEVELOPMENT

"Minor Steps to Major Gifts"

by Dave Bell, Senior Director of Fund Development & Community Engagement at VOA

OPENING Panel



Carl L. Williams, Sr.

Founder, President & CEO
20/twenty

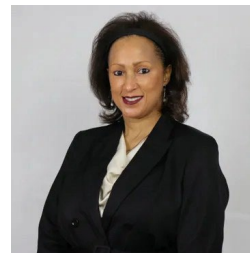
DISCUSSION on SUSTAINABILITY

8:15 AM | *View Pointe Hall*



Jennifer Hancock

President & CEO
Volunteers of America Mid-States



Adria Johnson

President & CEO
Metro United Way



Kenya Freeman

CEO
Workwell Industries



Amy Luttrell

President & CEO
Goodwill Industries of Kentucky



Jonathan Beatty

Founder & CEO
Servonta

In the opening panel discussion, 20/twenty President & CEO Carl L. Williams, Sr. invites five nonprofit executive leaders from our community to join him on stage. This guided discussion will focus on long-term financial and organizational sustainability where panelists will share best practices, challenges and goals.

CLOSING KEYNOTE

**LEADING WITH INTENTION:
THE KEY TO FIVE STAR LEADERSHIP**
3:15 PM | *View Pointe Hall*



Joan Garry

Founder of Nonprofit Leadership Lab
Host of Nonprofits are Messy
Executive Coach

In the closing keynote address, Joan Garry will deliver an empowering and motivating message. She is an internationally recognized champion for the nonprofit sector and a highly sought after executive coach for CEOs of some of the nation's largest organizations. She is called upon by large organizations to tackle substantial change management, crisis management, leadership transitions requiring a compassionate truth-teller, a hands-on strategy advisor, a communications expert and a focus on strong internal and external messaging.

FUND DEVELOPMENT

● **DESIGNING YOUR PROGRAM FOR GRANT SUCCESS |**

Classroom 2 | 9:30-10:30 AM

Becky Morris

Before you start writing your grant, how developed is your program? This session will explore the primary elements your program needs to write a strong application and successfully implement your awarded funding: goals and objectives, key activities, budget items, and success metrics.

● **THE POWER OF PEER-TO-PEER FUNDRAISING |**

Classroom 2 | 10:45-11:45 AM

Christina Miller

Peer-to-Peer Fundraising leverages your most passionate supporters to fundraise on behalf of your organization. This training will provide best practices on how to recruit and empower champions for your cause by enabling them to share their personal stories with their own networks. Learn how P2P fundraising can expand your reach, introducing new donors and additional donations to your organization.

● **THE NONPROFIT WORLD: WHAT I'VE LEARNED |**

Auditorium | 12:45-1:45 PM

Jeremy Jarvi

With 20+ years of industry knowledge, Jeremy will share insights into the world of fundraising as he's experienced it. This session will be engaging, useful, and a little humorous.

● **MINOR STEPS TO MAJOR GIFTS |**

Classroom 2 | 2:00-3:00 PM

Dave Bell

Creating a major gifts program can seem daunting and can come with a lot of pressure. We will look at ways to create a manageable plan that leads to long-term fundraising success that will grow your major gifts campaign. Key topics will include: identification, cultivation, tracking your progress, and of course, making the ask.



Becky Morris

Volunteers of America Mid-States

Since 2021, Becky Morris has worked as the Director of Grants at Volunteers of America Mid-States, overseeing the organization's grant writing, submissions, and management. The department annually submits 125+ grants and receives more than \$23 million in awarded funding. Prior to joining VOA, Becky spent the previous six years at the Muhammad Ali Center as the Manager of Development and the Marketing & Communications Associate, where she was responsible for the Center's fundraising, grant writing, donor relations, and membership program. She holds a Master of Science in Library Science from the University of Kentucky and a Bachelor of Arts in Public Relations from Western Kentucky University. She loves reading, running, and playing with her dog, Pepper.



Christina Miller

Community Foundation of Louisville

Christina graduated with honors from the University of South Carolina in 2012 where she earned her M.S. in Applied Clinical Psychology. After graduation, Christina entered the nonprofit sector and never looked back. Her passion for helping others led her to work with children in the foster care system for nearly a decade. In 2017, Christina made the career switch from providing therapeutic treatment to focusing on communications and fundraising for nonprofits. What she loves most about fundraising is helping nonprofits tell their story in a compelling way that drives action. Witnessing the impact that intentional giving has on individuals, nonprofits, and the community renews her faith in humanity and motivates her to keep moving forward with her advocacy work. Christina's main goal in life is to help as many people as possible gain access to the resources they need to not just survive but live a happy and fulfilling life.



Jeremy Jarvi

LouCity & Racing Foundation

JEREMY L. JARVI, Louisville, KY., graduated from Trinity High School in 1998 and the University of Kentucky in 2002, earning a bachelor's degree in integrated strategic communications. In March of 2022, Jeremy was named the inaugural Executive Director of the LouCity & Racing Foundation. In this role, Jeremy leverages the love and power of soccer to provide access, resources, and opportunities to youth throughout our region. Previously, Jeremy served as the Regional Chief Development Officer for the American Red Cross for eight years, raising millions of dollars to support the nation's largest humanitarian organization. Prior to this position, Jeremy was the Director of Investments & Sponsorships at Greater Louisville Inc. – the Metro Chamber of Commerce. Jeremy is highly engaged in the community where he has, and is, serving on numerous boards and committees, including the Greater Louisville UK Alumni Board, UK National Alumni Board, UK College of Communications Dean's Leadership Council, Team Shaan Foundation, Capital Access Corporation, Trinity High School, Dare to Care, Unbridled Derby Gala Committee, and others. Jeremy has been recognized as a 40 Under 40 by Louisville Business First (2019), recipient of the Lucy Award presented by the Family Scholar House (2018), received the Excellence in Leadership Award from the American Red Cross (2018), named as one of 20 People to Know in Nonprofits by Louisville Business First (2015), Five New Faces of Philanthropy Honoree and Overall Winner by NFocus Magazine (2013), recipient of the William T. Young UK National Alumni Association Young Alumni Award (2013), and received the Dr. Richard Wolfe Leadership In Action Award (2011). Jeremy and his wife Kristen have two sons, Landon (13) and Tate (9) and reside in Louisville, KY.



Dave Bell

Volunteers of America Mid-States

Dave Bell is the Senior Director of Fund Development and Community Engagement with Volunteers of America Mid-States. In this role, he oversees the fundraising efforts of the organization that covers Kentucky, West Virginia, Tennessee, and Clark and Floyd Counties in Indiana. He presently supervises a multi-state staff team that raises over \$3 million dollars annually in philanthropic gifts. He is also leading a \$25 million capital campaign if you are prepared to give today. Dave started his non-profit career early, working as a summer camp counselor at the YMCA after college. His summer job turned into a 20-year career with the YMCA and eventually led him to Louisville. In Louisville, Dave spent five years as the Executive Director of the Downtown Louisville YMCA. He then went on to oversee Fund Development, Marketing, Membership, and Government Relations efforts for the Kentucky Science Center. Dave has been a speaker at national and regional conferences speaking on the topics of staff development, leadership, relationship building, and fundraising.

BOARD GOVERNANCE

● MYTHS, BARRIERS, & STRATEGIES FOR BOARD DIVERSITY & INCLUSION

Classroom 1 | 9:30-10:30 AM

Ideisha Bellamy

Explore common myths and barriers that may be slowing your organization's progress in developing a diverse and inclusive non-profit Board. Delve into the opportunities for effective recruitment, engagement and collaboration with BIPOC leaders who might be a great fit in governance for your organization. Even if you know "why" diversity is important for your Board, this course will share a fresh perspective on strategies for "how" to refresh your efforts to build a Board that reflects the diversity of this community while ensuring long term success and sustainability for your nonprofit.

● CHARTING YOUR COURSE: HOW TO PREPARE FOR YOUR NEXT STRATEGIC PLAN

Classroom 1 | 10:45-11:45 AM

Dr. Josh Kornberg

Every three to five years, many organizations prepare for their upcoming strategic plan. While these plans are useful, they often find themselves collecting dust on a shelf. In this session, we will discuss best practices for beginning a strategic planning session as well as practical tips for implementing your strategic plan into the day-to-day work of your organization.

● FACILITATING A BOARD RETREAT

Classroom 1 | 12:45-1:45 PM

Wendy Dant Chesser

This session will focus on how to channel the passion, engagement and impact of a volunteer Board of Directors in setting a strategic direction for your non-profit organization. Wendy will guide you through the importance and expectations of a Board Retreat and explain the essential skills needed of a facilitator.

● SUPERCHARGE YOUR BOARD FOR SUSTAINABILITY

Classroom 1 | 2:00-3:00 PM

Carl L. Williams, Sr.

Learn innovative strategies on how to engage your board directly in your mission. Participants will walk away with a solid plan and next steps for board engagement that will position them for long-term financial and organizational sustainability.



Ideisha Bellamy

Bellamy Business Insights LLC

Ideisha Bellamy, the driving force behind Bellamy Business Insights LLC, is a strategist and visionary leader who possesses a remarkable talent for helping organizations chart a new path forward. Ideisha's goal is to help nonprofits uncover, refine and execute strategies that create profound and meaningful change. Before launching her firm in September 2022, Ideisha held pivotal leadership roles in government, healthcare and nonprofits. She notably served as Chief Operating Officer at Maryhurst and Corporate Compliance Manager for Equian, LLC. Ideisha also spent years with the KY CHFS Office of Inspector General (OIG) where she led teams engaged in complex investigations and regulatory oversight of thousands of companies within the Commonwealth. Governor Steve Beshear recognized her talent, appointing her to State Division Director for OIG, overseeing the work of five offices statewide. Ideisha has been married to her college sweetheart, Theophilus Bellamy for 24 years. Together, they have five children.



Dr. Josh Kornberg

Caesars Foundation of Floyd County

Dr. Josh Kornberg is the executive director of the Caesars Foundation of Floyd County where he oversees the disbursement of funds for non-profit grants, scholarships, and small business loans. Prior to Caesars Foundation, Kornberg was a development officer at Ivy Tech Community College – Sellersburg, Kentucky Science Center, and Volunteers of America Mid-States. Additionally, Kornberg is deeply engaged in his community where he serves at the president of Donors Forum of Kentuckiana, vice chair of Metro United Way & board member of Indiana Philanthropy Alliance and One Southern Indiana. He earned his MS and EdD from Spalding University, and graduated from IU Southeast with a BA in communications. Kornberg has been named Young Professional of the Year by Leadership Southern Indiana, One Southern Indiana and 40 Under 40 by Louisville Business First.



Wendy Dant Chesser

One Southern Indiana

In November 2012, Wendy Dant Chesser joined One Southern Indiana (1si) as the President and CEO. Wendy was named one of North America's Top 50 Economic Developers of 2015 by Consultant Connect. The Indiana Economic Development Association awarded her the "Economic Development Professional of the Next Half-Century" in June, 2018. In 2016, her Indiana peers named her the "Chamber of Commerce Executive of the Year." In 2020, One Southern Indiana was named Chamber of the Year by the Indiana Chamber Executives Association, an honor that her team was most deserving of due to their aggressive actions to help businesses during the COVID-19 pandemic and resulting recession. And in 2022, the Indianapolis Business Journal named Wendy one of the "Indiana 250," recognizing her as one of the most influential business leaders in the state.



Carl L. Williams, Sr.

20/twenty Strategic Consultants

Carl L. Williams, Sr., is President and Chief Executive Officer of 20/twenty Strategic Consultants. Carl has provided the vision and leadership that has contributed to the rapid and focused growth of many companies across the nation. 20/twenty Strategic Consultants is a leading consulting company focused solely on Education and Non-Profit business innovation. This positions 20/twenty for a National Reach in the consulting marketplace and establishes them as a thought leader on business innovation. Additionally, Carl has led the acquirement and advancement of data security protocols for business systems, product migration to the cloud, and innovative integration initiatives for Human Resources, Finance, Payroll, and Benefit administration. A former K-12 classroom teacher and K-12 Human Resources professional, Carl draws from his experience in the field to reinforce 20/twenty's authentic commitment to improving the technology within nonprofit and education business office environments.

NONPROFIT LEADERSHIP

● STEWARDING RELATIONSHIPS FOR THE GREATEST IMPACT

Auditorium | 9:30-10:30 AM

Jennifer Hancock

Managing organizational relationships in a world that is fast paced and ever changing has never been more important. This session will profile a strategic stewardship model of engagement for elected officials, boards of directors, donors and other key stakeholders. Having a mutually beneficial and reciprocal process of community engagement is essential to organizations success.

● CHECK YOURSELF BEFORE YOU WRECK YOURSELF: NAVIGATING PERSONAL BIASES & FOSTERING INCLUSION AT WORK

Auditorium | 10:45-11:45 AM

Cherena Fox & Keionna Baker

Embark on a profound exploration of your daily interactions and cognitive patterns to empower your nonprofit's mission. Address microaggressions head-on and cultivate the skill of preemptively examining personal biases before they impact your organization's reputation and inclusive culture.

● THE LASTING ADVANTAGE: INSPIRE, CONNECT & MAKE A DIFFERENCE ANYTIME ANYWHERE

Classroom 2 | 12:45-1:45 PM

Ian Williams

The Lasting Advantage strategy presented in this keynote ushers the audience into a foundational perspective shift that maximizes business results, improves relationships, and empowers each person to live out their purpose more powerfully than ever.

● CREATING AN ENGAGED WORKFORCE

Auditorium | 2:00-3:00 PM

Molley Ricketts

Your employer brand is defined by who you are, who you want to be, and who you are perceived to be, but it takes constant engagement and content to reflect this across all the necessary platforms for each candidate to experience. Let us take the lead in making your best impression for potential candidates. Attracting high quality candidates is essential, but making sure your business stays in front of today's workforce is an overwhelming and costly task. Who has the time and tools to do this successfully? We do! Communication must be a top priority in aligning your employees with your mission. We'll help you get each team member on board, define your employee goals, and create standardized company practices for employment and retention. Providing outstanding employee service makes each team member feel secure and confident in their employment. Our human resource professionals help you account for and take great care of each employee's individual needs. Let us help with specific HR tasks, or we can provide you with full service HR solutions.



Jennifer Hancock

Volunteers of America

Jennifer Hancock is the President and CEO of Volunteers of America Mid-States. Jennifer earned her bachelor's and master's degrees in social work from the University of Kentucky, where she began a career dedicated to social justice and community building. Jennifer has served in many capacities during her more than 20 years of professional leadership in the nonprofit sector and in her 16 years advancing the mission of VOA. Jennifer is active in the community, serving as Immediate Past Chair of the Leadership Louisville Center, Chair of Impetus for a Better Louisville, and on the boards of the Kentucky Children's Justice Act Task Force, University of Louisville School of Public Health, Smart on Crime, National Office of Volunteers of America, AdventHealth Hospital, Board Development Chair and Secretary of the West End Opportunity Partnership, Secretary/Treasurer of 1 Clay County, executive committee of You Decide, Kentucky! and as an Advisory Council Member of Young Professionals Association of Louisville. She was recently honored to have her experience in the addictions field featured in Newsweek Magazine. Jennifer was also the recipient of the 2022 and 2023 Business First Power 50 award as well as the 2022 Enterprising Women award.



Cherena Fox & Keionna Baker

The Elephant in the Room

Keionna and Cherena bring over a decade of expertise in fostering inclusive workspaces that bridge cultural and communication gaps. Their personal career experiences highlighted the need for companies to prioritize inclusion and belonging through effective training and nurturing of a strong company culture, leading to better employee performance and retention. At The Elephant in the Room, their distinct approach and engaging platform produce enriched company cultures and improved overall performance.



Ian Williams

Lead Well Strategic Consulting

Ian Williams is the co-founder and President of Lead Well Strategic Consulting (Lead Well), a modern organizational development consulting and training company specializing in leadership development, mental health awareness and executive coaching for small to midsize organizations. As a Maxwell Leadership certified team member and an organizational and leadership development practitioner-scholar, Ian has led regional consulting workshops and training to develop core business, technology, and diversity strategies leading to mission-critical improvements and more effective organizations. Ian has worked with a diverse clientele in corporate operations, educational institutions, and non-profit work. As a native of Southern Indiana, Ian lives in New Albany with his wife and business partner, Airlea "Lea" Williams, and their two young children.



Molley Ricketts

Incipio Workforce Solutions & UnicusPar

Molley Ricketts, CEO and Founder of Incipio Workforce Solutions and UnicusPar, her career in human resources, specifically recruiting and workforce alignment journey started as an entry level recruiter and gradually built her expertise by working with prominent companies such as Sears Credit Financial, Citi Group, Accent, Lockett & Farley Architects and Engineers, GE Intelligent Platforms, Masonic Homes Kentucky, One Source Logistics, HJI, and more. Over the course of 25 years, Molley has developed a deep understanding of the recruiting industry, harnessing superior technology and social strategies to help businesses hire the right people and create stronger teams. Her role involves overseeing the recruitment process, analyzing data and analytics, strategic planning, and identifying potential risks associated with turnover and poor company culture. Through strategic partnership, survey, and team alignment, together, she has created a firm to help other companies create a work culture that recognizes and appreciates their teams, promotes equality and fairness, and ensures people are in the best positions to thrive, it ultimately leads to significant positive impacts for the entire organization.

AFTER THE CONFERENCE



Continue the Conversation!

Please join us at 5:00pm for
networking at the
Jockey Silks Great Room

The Galt House Hotel
140 North Fourth Street
Louisville, Kentucky 40202

Conference Survey

We'd love to hear about your experience today and how we can improve this event for future years.

After the conference, you'll receive an email with a link to take a brief survey about your experience today. Thank you in advance for your comments and feedback. Once you complete the survey, you'll receive a link to access the slides from each of today's presentations.

**Please share your
photos from today's
event on social media!**

20/twenty
STRATEGIC
CONSULTANTS

Non-Profit Peer Advisory Group

*Build a sustainable organizational
strategy*

Bring focus to your strategy
that will move your non-profit
to the next level.

Coming January 2024

#20twentySLC
Tag: @2020strategic

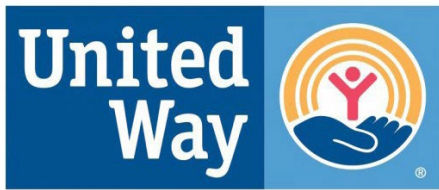
THANK YOU



The 20/twenty team would like to sincerely thank you for joining us for a great day of thought leadership, education, and community building. We know your time is precious, so we hope you leave today with new tools and ideas to advance your mission, lead your organization, and achieve your goals. Everyone in attendance today is committed to improving the lives of others and making our community stronger.

**We're honored to be in your presence,
and it is a privilege to serve you!**

THANK YOU TO OUR SPONSORS



Metro United Way



MARLiMAR
MOBILE STRATEGIES



PARTNERS & VENDORS



SIMMONS
COLLEGE OF KENTUCKY

www.2020strategic.com