

## Welcome

At this year's Philanthropy WV Conference we celebrate 30 years of strengthening the Mountain State through Philanthropic Investments.

West Virginia can be defined by geographical borders, people, ideas, communities, and stories. It is a place that exists on a map and in the heart. This conference aims to provide a space to untangle the historical and current roots of philanthropic and community collaboration that aid in the continued resilience of West Virginia and its people.

Let's use the next few days as an opportunity to strengthen the ties that bond us, reaffirm our commitment to doing all the good that is in our power, and transform our practices to align with our values. None of us can do this work alone; we must forge the path together.

We would like to recognize the phenomenal work of our conference planning committee: BETH COLLINS, SARAH DEAN, SUSIE NELSON, DEBBIE STANTON, STACI STEPHEN.

Finally, our thanks to you, our sponsors, and presenters for your generosity of time, talent, and treasure that cultivates abundance for those that we serve and partner.

*In service,*



MARIAN CLOWES, Board Chair of  
Philanthropy WV

JENNIE SMITH, President and  
CEO of Philanthropy WV



# Conference Highlights

---

## Tuesday, October 3

### *Re-Entry Simulation: Challenges Transitioning From Incarceration*

Explore the struggles and challenges faced by individuals who are transitioning from incarceration back into society by experiencing the first month of post-release life.

### *Difficult Dialogues: Navigating Conflict More Successfully*

This interactive session will offer simple tools and frameworks that can help equip you to navigate conflict more successfully while managing your own stress and anxiety.

## Wednesday, October 4

### *Low Barrier Grantmaking to Combat HIV, Hepatitis and Substance Use Disorder in West Virginia*

A panel discussion about the grantmaking of Community Education Group, an intermediate grantmaker who's strategic grantmaking centers its work in communities and non-profits led by communities of color and has invested more than \$2 million across the region to address public health needs.

### *The Power of Community-Led Storytelling & Narrative Change in Community Development*

This session will explore storytelling, narrative change, and communications strategies used by the West Virginia Community Development Hub in working with rural communities.

# Tuesday, October 3

---

**7:30-9:00am**

*Registration & Breakfast*

**LOCATION**

Ballrooms 1 & 2

---

**8:30am**

*Welcome*

JENNIE SMITH

President and CEO Philanthropy West Virginia

ERIKS JANELSINS

President and CEO Oglebay Foundation

---

**9:00-9:30am**

*Professional Headshots*

**LOCATION**

Ballroom 3

**PHOTOGRAPHER**

DUSTIN MERRILL, Mon Valley Media

**DESCRIPTION**

Update your Headshot or have a new one taken!

Will take less than 10 minutes to do.

**9:30-11:30am (this is a two-hour session)**

**SESSION**

*Re-Entry Simulation*

**LOCATION**

Ft. Henry Room

**FACILITATOR**

ASHLEY LOUGH, Prevention & Re-entry Coordinator,  
United States Attorney's Office, Northern District of  
West Virginia

**DESCRIPTION**

The Re-entry Simulation simulates the struggles and challenges faced by individuals who are transitioning from incarceration back into society by experiencing the first month of post-release life.

---

**9:30-10:30am**

**SESSION**

*Trending Legal Issues for Foundations*

**LOCATION**

Terrance Room

**FACILITATOR**

BEN MCDEARMON, JD, Council on Foundations

**DESCRIPTION**

An opportunity to discuss legal issues foundations have been seeking guidance on recently, including questions regarding grantmaking and compliance.

**9:30-10:30am**

**SESSION**

*Difficult Dialogues*

**LOCATION**

Ballroom 1

**FACILITATOR**

MARIBETH SALEEM-TANNER, ED of Community Food Initiatives

**DESCRIPTION**

This interactive session will offer simple tools and frameworks that can help equip you to navigate conflict more successfully with diverse stakeholders while managing your own stress and anxiety.

---

**10:30-10:45am BREAK**

---

**10:45-11:45am**

**SESSION**

*Driving Social Impact Through the Arts and Philanthropy*

**LOCATION**

Ballroom 1

**PANELISTS**

RENEE MARGOCEE, Executive Director, Tamarack Foundation; JAMIE LESTER, Founder, Love Hope Center for the Arts; KATE MARSHALL, Executive Director, Mother Jones Center for Resilience (MOJO); Facilitated by NINA RIIVALD, Philanthropy WV

**DESCRIPTION**

The arts play a vital role in community building and engagement. Join this panel to discover the ways that artists and funders collaborate to engage communities in various ways that build resilience and drive social impact.

---

**10:45-11:45am**

**SESSION**

*USDA Rural Partners Network Desks 101*

**LOCATION**

Terrace Room

**FACILITATORS**

KAYLEIGH KYLE, Supervisory Community Liaison

RYAN THORN, State Director

**DESCRIPTION**

What is the RPN? The Rural Partners Network (RPN) is an alliance of federal agencies and commissions working directly with rural communities to expand rural prosperity through job creation, infrastructure development, and community improvement. This session will introduce you to the two RPN Community Networks in West Virginia, provide examples of RPN's impact, and how Community Liaisons can bridge the gap between community capacity and philanthropic impact.

---

**11:45am-Noon BREAK**

## Noon-1:30pm

### *Lunch & Plenary Speaker*

#### **LOCATION**

Ballrooms 1 & 2

#### **ABOUT THE SPEAKER**

DR. DANNY TWILLEY is the Assistant Vice President of Economic, Community and Asset Development for the Brad and Alys Smith Outdoor Economic Development Collaborative. By utilizing West Virginia University's



intellectual and social capital, Danny focuses on growing the state's outdoor economy to make West Virginia a more desirable place to live, work and play by leveraging the state's expansive outdoor recreation assets.

To do so, he leads initiatives that focus on talent attraction and retention, outdoor community development, outdoor recreation asset development, business development, workforce development and research to tell the story of outdoor recreation in the state. He approaches this work by engaging with communities and facilitating academic collaborations across the University, state and local governments, outdoor industry, and related groups.

---

## Noon-1:45pm

#### **ONGOING SESSION**

*Professional Headshots*

#### **LOCATION**

Ballroom 3

**PHOTOGRAPHER**

DUSTIN MERRILL, Mon Valley Media

**DESCRIPTION**

Update your Headshot or have a new one taken!  
Will take less than 10 minutes to do.

---

**1:30-1:45pm BREAK**

---

**1:45-2:45pm**

**SESSION**

*Foundations of Finance*

**LOCATION**

Ballroom 2

**FACILITATORS**

KELLY SHAFER & SAUNDRA UY

**DESCRIPTION**

This presentation will address the basics of finances for nonprofits. Topics will include how to read financial statements, reading/understanding an audit, and specific issues related to community and private foundations.

---

**1:45-2:45pm**

**SESSION**

*Education Affinity Group (EAG)  
Collaborative Philanthropy Advancing West Virginia*



**LOCATION**

Terrace Room

**PANELISTS**

DR. AMELIA COURTS, The Education Alliance

KATE WHITE, Lawyer in School Program

MELANIE CRAXTON, Senior Program Officer,  
CLAUDE WORTHINGTON Benedum Foundation

**FACILITATOR:**

STEPHANIE HYRE, Program Officer, The Greater Kanawha Valley Foundation

**DESCRIPTION**

The Education Affinity Group is a peer networking group that focuses on collaborative philanthropy that advances West Virginia's educational system and thrives to ensure that investments are connected to local priorities that create measurable impact. Panelists will share innovative practices and partnerships in education and the role of collaborative philanthropy in accelerating opportunities for underserved youth.

---

**1:45-2:45pm**

**SESSION**

*Advocacy 101 & WV Policy Agenda for 2024*

**LOCATION**

Ballroom 1

**FACILITATOR**

BEN MCDEARMON, JD, Council on Foundations

**DESCRIPTION**

This session will provide an overview of the rules for foundations engaging in lobbying and advocacy work, as well as an update on the current policy landscape with the potential to affect philanthropy.

---

**2:45-3:00pm BREAK**

---

**3:00-4:00pm**

**SESSION**

*Ask a Lawyer*

**LOCATION**

Terrace Room

**FACILITATOR**

BEN MCDEARMON, JD, Council on Foundations

**DESCRIPTION**

Do you need to ask a legal question about your foundation? Have questions emerged after hearing the 2024 policy agenda or trending legal issues? Sign up for a private 10 minute slot at the registration desk.

---

**3:00-4:00pm**

**SESSION**

*Role Based Sessions*

**LOCATIONS**

Ballroom 1: CEOs

Ballroom 2: *Program Officers*

Fort Henry: *Communications and Finance & Operations*  
(*Will be seated at separate tables*)

**DESCRIPTION**

Sessions designed as informal networking opportunities for role based peers to discuss obstacles, best practices, and strategic plans for 2024.

---

**4:00-5:15pm BREAK & REFRESH**

---

**5:30-8:00pm**

*Depart for the Spirit of Philanthropy Awards*

**LOCATION**

Stifle Fine Arts Institute  
1330 National Rd, Wheeling, WV 26003

# Wednesday, October 4

---

**8:00-9:00am**

*Registration & Breakfast*

**LOCATION**

Ballrooms 1 & 2

---

**8:30am**

*Welcome*

JENNIE SMITH

President and CEO Philanthropy West Virginia

ELIZABETH PELLEGRIN

Chief Marketing Officer and Vice President of  
Philanthropy West Virginia

---

**9:30-10:30am**

**SESSION**

*Measuring Impact Beyond the Numbers—  
An Introduction to Ripple Effects Mapping*

**LOCATION**

Terrace Room

**FACILITATOR**

BETH COLLINS, Executive Director of Sisters of St. Joseph  
Health & Wellness Foundation

**DESCRIPTION**

Ripple Effects Mapping (REM) is a participatory data collection method designed to capture the impact of complex programs and collaborative processes that is well-suited for evaluating group-focused efforts. This session will introduce REM and its possibilities to benefit both grant partners and grant funders in understanding the impact of grant-funded programs.

---

**9:30-10:30am****SESSION**

*How to Build a Better Board*

**LOCATION**

Ballroom 2

**PRESENTER**

RALPH SERPE, President & CEO Adam's County  
Community Foundation & CEO Building  
Unrestricted LLC

**DESCRIPTION**

Boards can do more than provide resources, direction, and oversight. They can open doors and supercharge your development and program efforts. In this session we'll look at how you can cultivate the board members you want and look at board service from a different perspective.

---

**9:30-10:30am****SESSION**

*Low Barrier Grantmaking to Combat HIV, Hepatitis and  
Substance Use Disorder in West Virginia*

**LOCATION**

Ballroom 1

**PANELISTS**

LEE STORROW, Senior Director External Affairs,  
The Community Education Group

ANNE RICCI, Marketing Director, Wheeling Health Right

NAKI AUSTIN, Co-Founder and CEO, The Healing House

MASEN DAVIS, Executive Director, Funders Concerned  
About AIDS

**DESCRIPTION**

This session will explore the grantmaking of Community Education Group, an intermediate grantmaker who's strategic grantmaking centers its work in communities and non-profits led by communities of color and has invested more than \$2 million across the Appalachian region to address critical public health needs. The panelists will explore the epidemiology of HIV and other infectious diseases in West Virginia, provide a national context from Funders Concerned About AIDS, and provide an opportunity to hear from non-profits working on the ground to address these important public health goals.

---

**10:30-10:45am BREAK**

---

**10:45-11:45am**

**SESSION**

*Raising Awareness Through Social Media*

**LOCATION**

Ballroom 1

**PRESENTER**

KRISTIN MEEKS, WV Social Media

**DESCRIPTION**

This session will discuss how to effectively share your story and increase brand awareness through social media platforms. You will discover how to engage your audience using your staff, board, and supporters.

---

**10:45-11:45am**

**SESSION**

*The “Inside--->OUT : incARceraTion” Installation:  
An immersive and interactive art experience*

**LOCATION**

Fort Henry Room

---

**10:45-11:45am**

**SESSION**

*The Power of Community-Led Storytelling & Narrative  
Change in Community Development*

**LOCATION**

Terrace Room

**FACILITATOR**

The HUB, West Virginia Community Development Hub

KATIE LOUDIN, Director of Strategic Development

JORGE RODRIGUEZ-STANLEY, Communications Associate

**DESCRIPTION**

The Power of Community-Led Storytelling & Narrative Change in Community Development

This session will explore storytelling, narrative change, and communications strategies used by the West Virginia Community Development Hub in working with rural communities. When communities are given the tools and opportunities to shape their own narratives, they can dispel negative stereotypes about their places and the region.

---

**11:45am-Noon BREAK**

---

**Noon-2:00pm**

*Lunch & Plenary Speaker*

**LOCATION**

Ballrooms 1 & 2

**SPEAKER**

AMY JO HUTCHISON, Economic Justice Organizer

**ABOUT THE SPEAKER**

Born and raised in West Virginia, AMY JO began organizing in poor and marginalized communities across the state in 2017, using her lived experience of poverty to connect with people who share the same experience.



In February 2020, AMY JO spoke to the United States House Committee on Oversight and Reform regarding the poverty level in Washington D.C. Her testimony went viral and has provided the opportunity to discuss poverty on a much broader stage.

She is building a movement grounded in West Virginia, *Rattle the Windows*, with folks impacted by the issues, focused on economic justice. In October of 2021, she



appeared in episode 3 of *The Problem with Jon Stewart*, “Working-Class Economy,” in which she discussed the issues affecting the working poor. AMY JO can be reached at [rattlethewindows@gmail.com](mailto:rattlethewindows@gmail.com).

---

**2:00-2:15pm BREAK**

---

**2:15-3:30pm**

**SESSION**

*Federal Funders Roundtable: How Federal Partnerships Can Maximize Philanthropic Partnerships and Impact*

**LOCATION**

Terrace Room

**PANELISTS**

JAMES BUSH, Appalachian Regional Commission State Director WV

RYAN THORN, USDA Rural Development, State Director WV

BRIGGS WHITE, IWG for Coal Communities, Deputy Executive Director

**FACILITATOR**

BILL WOODRUM, Benedum Foundation Senior Program Officer

**DESCRIPTION**

Join this session to engage with federal funding agencies and gain a better understanding of the roles and priorities of each agency and partnership opportunities at the federal level. Participants will learn why federal agencies choose partnership opportunities and how the agencies define success and actualize capacity building programming.

---

**2:15-3:15pm**

**SESSION**

*Supporting The Unsheltered: A Case Study of a Multi-tiered Collaborative Approach to Open and Maintain a Warming Shelter*

**LOCATION**

Ballroom 1

**PANELISTS**

JANETTE LEWIS, United Ways of Monongalia and Preston Counties; BECKY ROD, Monongalia County Warming Shelter; BRIAN BUTCHER, Morgantown City Counselor; KATIE KLUG, Catholic Charities WV; Panel moderated by PATTY SHOWERS RYAN, President of Your Community Foundation

**DESCRIPTION**

This case study highlights the efforts to shelter the

unhoused in Morgantown, WV during the winter of 2022-2023. This unique panel has speakers representing local government, nonprofits, united ways, community organizers, and funders. Join the panelists as they share their successes, obstacles, strategies, and how to address the question “What’s next?” for the upcoming winter.

---

**2:15-3:15pm**

**SESSION**

*Making Scholarships Count: Navigating Scholarship Displacement*

**LOCATION**

Ballroom 2

**PRESENTER**

RALPH SERPE

**DESCRIPTION**

Half of all needs-based private scholarships reduce or eliminate a student’s financial aid package. It’s called scholarship displacement and it’s a growing issue in philanthropy. If your scholarship program ends the day after awards are announced, chances are, you’re not honoring donor intent or helping students close the gap between what they have and what they need to pay for school.

In this session we’ll take a close look at scholarship displacement and what you can do to make your scholarship awards matter. We’ll also share how scholarship providers are working together to ban scholarship displacement state by state and across the country.

---

**3:15-3:30pm BREAK**

**3:30-4:30pm**

**SESSION**

*Organization Based Networking*

**DESCRIPTION**

Sessions are designed as informal networking opportunities for organization types. Join your peers to discuss obstacles, best practices, and strategic plans for 2024.

**LOCATION**

Ballroom 1: *Community Foundations*

Ballroom 2: *United Ways*

Ballroom 3: *Private and Family Foundations*

Terrace: *Corporate Giving*

---

***Thank you for attending this year's conference.  
Can't wait to see you next year!***

# Sponsors

Thank you to Our Sponsors for your Support of Our Conference.



# Thank You

---

Thank you to our Volunteers, Special Guests, Speakers, Panelists, and Partners. This event would not be possible without your generosity of time, talent, and treasure. As an organization, Philanthropy West Virginia is only as strong as its members are engaged. Together we can achieve great things, learning and growing together to benefit the Mountain State.

## **Philanthropy WV Board of Directors**

MARIAN CLOWES, Chair

ELIZABETH PELLEGRIN, Vice Chair

MIKE LEWIS, Treasurer

JANELL RAY, Secretary

## **Board Members**

DENA CUSHMAN, DR. MICHELLE FOSTER,  
BROCK MALCOLM, DAVID MORAN, CHRISTINE MITCHELL,  
JESS PUGLISI-SANDERS, SAMUEL “TRES” ROSS III,  
PATTY SHOWERS RYAN, RENEE STEFFEN

## **Staff Members**

JENNIE SMITH, CEO and President

CHAD MATLICK, Director of Operations

NINA RIIVALD, Director of Membership Engagement

## Philanthropy West Virginia

### PHYSICAL ADDRESS

191 Scott Avenue Morgantown, WV, WVPB Building

### MAILING ADDRESS

P.O. Box 1584, Morgantown, WV 26505

### PHONE

(304) 517-1450

### SOCIAL MEDIA

#PWV2023

#WVPhilanthropy

#RuralPhilanthropy



Design: STEWART A. WILLIAMS  
[www.stewartwilliamsdesign.com](http://www.stewartwilliamsdesign.com)

Printing: MPB / [www.mpbonline.com](http://www.mpbonline.com)

Inside cover photography: AARON BURDEN @ Unsplash