

2011 MOWAA
ANNUAL
CONFERENCE
for the Common Good



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STRATEGIC PLAN FOR 2011 - 2012

OUR MISSION:

To Provide National Leadership to End Senior Hunger

OUR VISION:

To Eradicate Senior Hunger

THAT MEANS:

100% OF CLIENT NEEDS MET BY 2020

All Senior Nutrition Programs in the U.S. are able to meet the full nutrition needs of their current clients.

100% OF DEMAND MET BY 2020

No senior who requests service from a Senior Nutrition Program is turned away or wait-listed.

100% COVERAGE BY 2020

Every senior in the U.S. has a program to go to.

100% AWARENESS BY 2020

Every senior in need knows that senior nutrition services are available and knows how to ask for help.



STATE OF ILLINOIS
OFFICE OF THE GOVERNOR
SPRINGFIELD, ILLINOIS 62706

Pat Quinn
GOVERNOR

August 30 – September 1, 2011

Meals On Wheels Association of America
203 South Union Street
Alexandria, Virginia 22314

Greetings!

As Governor of the State of Illinois, I am pleased to welcome everyone gathered for the 2011 Annual Conference and Expo of the Meals on Wheels Association of America.

Meals on Wheels provides a truly invaluable service to our communities, and it is an honor for our state to host your conference this year. I encourage everyone present to take full advantage of the wonderful opportunities for networking, exchanging ideas and resources, and building professional skills and knowledge which this conference makes possible. I am certain that the wide range of speakers and other activities planned for this conference will greatly benefit everyone in attendance as you continue to pursue the worthy goal of ending senior hunger.

I would also like to offer a special welcome to those traveling from outside of Illinois for this event. During your stay, I encourage you to explore and discover the many sites and attractions that this great state has to offer. From historic landmarks and world-renowned museums, to first-class dining and theater experiences, to the scenic beauty of our small towns and prairies, there is truly a wide array of interests represented across the Land of Lincoln.

On behalf of the people of Illinois, I offer my best wishes for an enjoyable and memorable conference.

Sincerely,
A handwritten signature in cursive script that reads "Pat Quinn".
Pat Quinn
Governor



Peggy Miller
Chair MOWAA Board

Welcome to the 2011 MOWAA Annual Conference and Common Goods Expo!

Each year, I come to Conference to be re-energized for another year of fighting the fight to end senior hunger and creating a successful business! The challenges we face as local programs/businesses are shared nationally. No program, big or small, will go away not having learned something new and/or helped another program solve a problem you have already solved. I hope you find this year's Conference inspiring and energizing.

The challenges we face today are larger: more seniors, less resources, more natural disaster recovery and more for-profit competition. Our next step in ending senior hunger must be in building strong State Associations and stronger management in our businesses. Your Association is ready with skills and resources to help make your program a stronger, better and more competitive local program while finding leadership to establish State Associations to make our individual voices louder and more powerful.

Your National Association has all the tools ready to help you! Your Common Goods Vendor Expo offers many ideas and opportunities to help make your jobs easier! Your Conference training sessions provide training in every area of our business. From the National Center for Nutrition Leadership Certificate courses, to your Common Goods group purchasing, to your Legislative Updates and sessions, to your keynote speakers, you will find the information you need to be more successful operating your local program.

Enjoy the invaluable networking and RELAX a bit enjoying the camaraderie! I look forward to seeing you in the beautiful City of Chicago.



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- Managing client-owned facilities
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- Hot, frozen & shelf-stable meals
- DRI, RDA, USDA compliant menus
- Private Pay meal options

For seniors, seemingly simple tasks can be challenging. Like preparing a healthy meal. That's why we've spent the last 30 years perfecting the art of providing healthy, nutritious, flavorful meals to individual seniors and congregate groups. With benefits including strict health and safety controls, home-style cooking, and an extensive database of diverse recipes.

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WITH SPECIAL THANKS TO

Abbott Nutrition for sponsoring the Breakfast and Opening Session.

Bank of America for supporting the Advanced Financial Management Institute and the Board/Executive Director Institute, including 56 education grants.

Bateman Senior Meals for sponsoring the Opening Reception and three scholarships.

Bridgestone Retail Operations for sponsoring the Special Event.

GA/Sunmeadow Foods for sponsoring the Wednesday morning break.

MedAssets for sponsoring the Common Goods Expo and being the exclusive GPO Partner of Common Goods.

Mutual of America for sponsoring the Community Fair for the Common Good.

Ocean Spray Cranberries, Inc., for sponsoring the Tuesday afternoon break.

OfficeMax for supporting the registration desk and staff office.

Subaru of America for supporting the Leadership Certificate Program.

Valley Services, Inc., for sponsoring the Volunteer Management Track.

Walmart Foundation for sponsoring the We Are Meals On Wheels Event and the Senior Nutrition Institute—Basic Skills.

IMPORTANT CONFERENCE INFORMATION

REGISTRATION AND INFORMATION HUB

Conference Registration is located in the second floor lobby. Registration will be open:

- » *Monday, August 29: 12:00 noon – 7:00 p.m.*
- » *Tuesday, August 30: 7:00 a.m. – 5:00 p.m.*
- » *Wednesday, August 31: 7:15 a.m. – 5:15 p.m.*
- » *Thursday, September 1: 8:00 a.m. – 12:00 noon*

The We Are Meals On Wheels Hub, located near registration, is the place to get information and ask the staff questions about MOWAA's key initiatives and Member benefits. Come visit us, and see what all the "Hub"-bub is about.

Your Name Badge will be your ticket for entry to the Conference. It is vital to keep this badge on you at all times to ensure your admission to all meals, sessions and events.

CONFERENCE CONCURRENT SESSIONS

Rooms/Locations are not printed in the Conference Program this year. Please check the four-page Agenda-at-a-Glance in your registration pack to see where sessions will be held.

More Information about each concurrent session, including extended course descriptions and full-length presenter bios, is available online. Visit www.mowaa.org/agenda to see the additional details not included in the Conference Program.

Personalized Barcode Sign-in Stickers are included in your registration pack. Please use these stickers to "sign in" for all concurrent sessions you attend, regardless of whether you are interested in earning Certificate program credits.

CONTINUING EDUCATION CREDITS—ADA AND CFRE

Several Conference sessions have been pre-approved for continuing education hours by the Commission for Dietetic Registration, American Dietetic Association, and by Certified Fund Raising Executive (CFRE) International. Continuing Professional Education Verification/Certificate of Attendance forms are available at Registration upon request.

SCHOLARSHIPS

Award checks will be available for all scholarship recipients on Thursday at the MOWAA table in the Community Fair.

Please Note: Bank of America Financial Management and Board/Executive Director Grant winners must use their barcode stickers to sign in for and verify their participation in all sessions for their designated Institute in order to receive their award checks.

IMPORTANT CONFERENCE INFORMATION

MOWAA LEADERSHIP CERTIFICATE PROGRAM

“Certificate Track” Courses will confer credits toward a Leadership Certificate from the National Center for Nutrition Leadership. To receive credits, you must be enrolled in the Center and you must sign in to verify your attendance. Additional information about the Certificate program is available in your registration packet.

Three Institutes are being held within the Annual Conference, providing an opportunity for registrants to focus their education and gain in-depth knowledge.

- » **The Advanced Financial Management Institute**, supported by Bank of America, is designed for those who already understand key financial and accounting terms and concepts. This series of five courses provides instruction in tying financial measures to your program’s strategy and effectiveness.
- » **The Board/Executive Director Institute**, supported by Bank of America, is a series of two courses designed to provide a practical framework for building and strengthening the critical board/executive director partnership.
- » **The Senior Nutrition Institute—Basic Skills**, sponsored by the Walmart Foundation, is a series of four courses that provide an overview of essential nutrition program functions.

Center enrollees who attend all of the courses in a single Institute will receive a Specialist Certificate which recognizes this professional development achievement.

STATE ASSOCIATION ACTIVITIES

Current and Prospective State Associations are encouraged to use the MOWAA Annual Conference as an opportunity to hold business and/or interest meetings. Please see the Agenda-at-a-Glance for up-to-date information on scheduled State Association events.

A State-to-State Networking Meeting on Wednesday morning will bring members of all State Associations together into a single room to facilitate networking and sharing of ideas, goals and best practices.

GOING GREEN AT THE MOWAA CONFERENCE

Paper-lite: Only worksheets that are critical to the learning process will be printed and distributed at Conference sessions. All other slide decks, handouts and reference materials are available for you to view and download online at www.mowaa.org/handouts. (Log in required. Details were emailed to all attendees prior to Conference.)

Re-use: If you do not wish to keep your name badge at the end of Conference, please place it in one of the receptacles near registration so that it may be re-used.



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2011 MOWAA ANNUAL CONFERENCE & EXPO

for the Common Good

CONFERENCE AGENDA

Regardless of your learning style, we have an array of options for you at the 2011 MOWAA Annual Conference! You'll find the knowledge you're looking for, share best practices with your peers and take home skills through a wide mix of education sessions and workshops that include:

- » 3 Exciting Keynote Speakers
- » An Update on the Re-authorization of the Older Americans Act
- » 23, 90-Minute Certificate Program Courses
- » 6 Intensive Workshops
- » 3 Specialist Institutes
- » A Q&A Session with a Non-profit Lawyer
- » ... And Much More

MONDAY, AUGUST 29

PRE-CONFERENCE ACTIVITIES

10:00 a.m. – 2:00 p.m.

MOWAA Board Meeting

» *Board Members Only*

12:30 p.m. – 5:00 p.m.

❖ Certificate Track: Management

Emergency Preparedness: Is Your Program Ready?

- » *Attendance for pre-registered individuals only*
- » *Includes a box lunch*

Developing an Emergency Plan for your program may be an overwhelming task. A comprehensive plan should include not only how to prepare for an emergency, but also how to respond and to recover from any emergency that may affect your program. This

training provides practical steps to develop an all-hazards approach to emergency planning that includes your clients, your program's operations and community coordination. Make it a priority for your program to be ready.

Key Competency: Organizational Planning

Presenter: **Linda Netterville, MA, RD, LD**

TUESDAY, AUGUST 30

8:15 a.m. – 10:00 a.m.

Breakfast and Opening Session

Better Angels: How Humankind's Best Instincts Age Our World and Challenge Us to Care for It

Keynote Speaker: Ted Fishman, veteran journalist and author of *Shock of Gray*

The bestselling author talks about how unprecedented changes in the human lifespan and family change our lives, our communities and how we must care for our aging selves, those we love and those we must love. Ted Fishman will sign copies of his book in the foyer immediately following this session.

10:00 a.m. – 10:15 a.m.

Break

10:15 a.m. – 11:45 a.m.

Concurrent Sessions



Certificate Track: Development & Fundraising

Developing, Cultivating and Maintaining Relationships with Foundations

Foundations are one of many sources of organizational support, but they can be one of the most difficult to understand and navigate. In this session, a foundation professional will share background information on how foundations work. You will get tips on how to begin your approach to a foundation, and you will learn specific strategies for developing and maintaining foundation relationships.

Key Competency: Relationship Building

Presenter: **Joanna Nixon**

TUESDAY

10:15 a.m. – 11:45 a.m.



Certificate Track: Nutrition

Intro to Food Safety on the Go

Foodborne illness, especially among the elderly, is an issue of increasing concern. “Food Safety on the Go” is a train-the-trainer food safety course for home-delivered meal programs recently developed under a USDA grant by the University of Maryland in partnership with MOWAA. The course provides the necessary educational tools and relevant food safety information to educate MOW program staff, volunteers and clients, to improve their food safety knowledge and practices and decrease the risk of foodborne illness. This workshop will present data on food safety practices and procedures obtained from surveys of State Units on Aging and Community Nutrition sites and will unveil the “Food Safety on the Go” course.

Key Competency: Foodservice Knowledge

Presenters: **Nadine Sahyoun, PhD, RD** and **Amy Anderson, PhD**



Certificate Track: Volunteer Management

Sharing the Impact of Your Volunteer Program with Your Community

Stories abound in Meals On Wheels programs. Telling donors stories about the seniors you serve is inspirational and may motivate them to give more, but equally inspirational are stories about the impact of the volunteers who show up on seniors’ doorsteps, do your data entry or package meals behind the scenes. Their stories, motivations and photos can inspire new donors, engage the media in new ways and draw in new fleets of volunteers to help with your program. How do you do it? In this session, you will learn how and where to tell the great stories about your volunteers and their contributions to Meals On Wheels in a way that benefits your program, the seniors you serve and your bottom line. This workshop will include activities, takeaways and ideas to implement back at your program.

Key Competency: Relationship Building

Presenter: **Laura Huth**



Certificate Track: Financial Management

Non-Profit Organizations—Yes, They Are Different (Advanced Financial Management Institute)

This session will review the key characteristics of non-profit organizations, including financial statement differences, IRS reporting requirements, governmental audit reporting requirements

(Yellow Book and A-133) and significant changes in financial reporting requirements that have occurred in the most recent year.

Key Competency: Fiscal Responsibility

Presenter: **Robert J. (Bob) Kollar, MA, CPA**

11:45 a.m. – 12:00 noon

Break

12:00 noon – 1:30 p.m.

Lunch and Keynote

Reaching New Frontiers of Collaboration:
Broadening the Battle against Senior Hunger in America

Keynote Speaker: Jo Ann Jenkins, President of the AARP Foundation

The keynote remarks will emphasize the critical role of dynamic and innovative collaboration across various audiences in addressing the problem of senior hunger in America.

1:30 p.m. – 1:45 p.m.

Break

1:45 p.m. – 3:15 p.m.

Concurrent Sessions



Certificate Track: Development & Fundraising

What is Planned Giving? Why Should We Start a Program Now (and How?)

Non-profit organizations can position themselves to maximize fundraising and take advantage of the great transfer of wealth that is occurring in this country—if they can come out from under the shroud of the myths that define planned giving only in terms of deferred giving. A more modern and useful definition sees planned giving as donor centered financing strategies for capital, endowment and other major charitable gifts, where the donor's tax and financial planning goals are considered along with the institution's fundraising objectives. This session, designed for those with little formal planned giving experience, explains why you should explore your organization's planned giving fundraising potential and the necessary first steps you can take.

Key Competency: Revenue Development

Presenter: **Russel A. (Russ) Kost III, CFRE**

TUESDAY

1:45 p.m. – 3:15 p.m.



Certificate Track: Communications

Maximizing Media Relations—Part 1

Working with the media can be a daunting and exhilarating task. Learning what is newsworthy, how to earn media trust and coverage and the art of speaking in sound bites takes time and practice. This session, presented in two parts, will focus on how to build positive, lasting relationships with media outlets and how to become an outstanding press representative for your Meals On Wheels program. Learn techniques for earning coverage and preparing for when the media shows up—expectedly or unexpectedly. This hands-on, interactive course will guide you through mock interviews with the media and writing effective press communications. You will learn how to respond to reporter questions during news interviews, how to turn negative questions into positive responses and tips for staying on message. With new skills, strategies and tools for developing media relationships and top-shelf media communications, you will become an exceptional spokesperson for your Meals On Wheels organization.

Key Competency: Relationship Building

Presenter: **Laura Huth**



Certificate Track: Nutrition

Screening and Prioritizing Clients for Nutrition Risk

(Senior Nutrition Institute—Basic Skills)

The population of older persons is increasing very rapidly and will cause a surge in the need for nutrition and social service programs. MOW programs are currently seeing a great increase in demand. In fact, at the present time, a report indicates that 80% of MOW programs have a waiting list. With limited service dollars, how do programs assess and prioritize clients for nutritional services? This workshop session will identify key risk factors for food insecurity and malnutrition and describe the different survey and assessment tools currently used to identify clients that are at a high risk and in need of nutritional intervention.

Key Competency: Foodservice Knowledge

Presenters: **Nadine Sahyoun, PhD, RD** and **Jean Lloyd, MS, RD**



Certificate Track: Volunteer Management

Measuring the Effectiveness of Your Volunteer Program

Volunteers are a source of free labor, help publicize organizations, attract donors and often are potential donors themselves. Volunteer

programs are integral to the success of many non-profits, yet volunteer programs need to be managed well in order to fully benefit an organization. This workshop will illustrate ways to measure the effectiveness of each aspect of your volunteer program—from volunteer recruitment to retention. You will walk away with quantitative and qualitative ways to measure your volunteer program.

Key Competency: Organizational Planning

Presenter: **Stacey McKeever, MBA, MPH**



Certificate Track: Financial Management

Budgeting and Cash Management for the Non-Profit Organization—Part 1
(Advanced Financial Management Institute)

Presented in three parts, this course covers the development of budgets, including factors to consider, monitoring budgets versus actual results, responding to budget variances and reporting budget results. An in-depth exercise will give participants the opportunity to work in groups to develop a monthly and annual budget, as well as a three months and 12 months cash forecast.

Key Competency: Fiscal Responsibility

Presenters: **Robert J. (Bob) Kollar, MA, CPA** and
Kristin Carlson Vogen, JD

Additional Session

What's Ahead for the Older Americans Act?
Challenges and Opportunities during Reauthorization

This session will provide an update on the status of Congressional action related to reauthorization of the Older Americans Act; give an overview of MOWAA's main recommendations, the rationale for focusing on these and the data on which they are based; identify challenges, obstacles and opportunities to MOWAA's recommendations as well as the reauthorization process as a whole; and provide a "crystal ball" assessment of what the outcome will be, as well as how participants can have a role in the outcome.

Presenter: **Margaret B. (Peggy) Ingraham, MA**

3:15 p.m. – 3:30 p.m.

Refreshment Break

TUESDAY

3:30 p.m. – 5:00 p.m.

Concurrent Sessions



Certificate Track: Development & Fundraising

Best Practices in Gift Planning and How to Integrate Them into All of Your Asks

Every institution should have planned giving as an arrow in its fundraising quiver. This presentation and discussion will teach experienced fundraisers about the necessary components of a successful planned giving program, while providing fundraising novices with a practical orientation as to why people give charitable gifts. Participants from programs of all sizes and structures can benefit from this overview of gift planning, which focuses on understanding donors' needs relative to your organization; the giving habits of donors; the different ways of giving; advanced methods/techniques; guidelines for accepting planned gifts and suggestions for marketing planned giving to donors, prospective donors and their advisors.

Key Competency: Revenue Development

Presenter: **Russel A. (Russ) Kost III, CFRE**



Certificate Track: Communications

Maximizing Media Relations—Part 2

See description under Maximizing Media Relations—Part 1.

Presenter: **Laura Huth**



Certificate Track: Nutrition

Evolving Food Trends: Research and Industry Responses

(Senior Nutrition Institute—Basic Skills)

Evolving food trends occurring today will likely impact meal programs for older Americans. Join us for a discussion on foods and changes in eating practices associated with those trends and learn how health and wellness factors impact your participants' menus. Topics to be covered include functional foods, phytochemicals, probiotics and organic foods.

Key Competency: Foodservice Knowledge

Presenter: **Audrey McCool, EdD, RD, LD, FADA**



Certificate Track: Volunteer Management

Volunteer Engagement

Every organization needs volunteers, but volunteers themselves have needs. Each volunteer is looking for something different from her or his volunteer experience, whether it be looking to build additional skills, meet new people, contribute to an organization on a long-term basis or participate in fun, one-off activities. This workshop will address ways to support and engage different groups of volunteers and their different needs. It will teach you how to identify volunteer needs and talents, share volunteer success stories and build volunteer affiliation. The session will also provide an overview of volunteer database and software systems, online resources and best practices that can assist in organizing your work with volunteers.

Key Competency: Relationship Building

Presenter: **Stacey McKeever, MBA, MPH**



Certificate Track: Financial Management

Budgeting and Cash Management for the Non-Profit Organization—Part 2
(Advanced Financial Management Institute)

See description under Budgeting and Cash Management for the Non-Profit Organization—Part 1.

Presenters: **Robert J. (Bob) Kollar, MA, CPA** and
Kristin Carlson Vogen, JD

5:45 p.m. – 6:30 p.m.

We Are Meals On Wheels

Welcome to the Windy City, situated on the shores of Lake Michigan and in the heart of the Midwest. **Put on your We Are Meals On Wheels t-shirt** and join us in the Cotillion Ballroom for a “red carpet event” where we unveil the We Are Meals On Wheels Campaign.

6:30 p.m. – 7:45 p.m.

Opening Reception

Reconnect with old friends, meet new colleagues and network with your peers. Grab a glass of wine or a soda, get something to eat and meet your fellow MOWAA Members. Enjoy!

WEDNESDAY, AUGUST 31

7:45 a.m. – 8:45 a.m.

Breakfast and Networking

State-to-State Networking Breakfast

All Members of current and prospective MOWAA State Associations are encouraged to attend this special networking session and share challenges, successes and best practices in establishing state-based groups.

Member-to-Member Networking Breakfast

A fun way to make new connections and extend your network, this table-talk “mixer” will give you the opportunity to share breakfast and informal conversation with a diverse group of new and experienced MOW professionals from around the country.

8:45 a.m. – 9:00 a.m.

Break

9:00 a.m. – 10:30 a.m.

Concurrent Sessions



Certificate Track: Strategy & Governance

Board CPR: Restoring Health and Vitality to Your Board (Board/Executive Director Institute)

The health of your organization is directly tied to the health of your board. If your board is demonstrating signs of unhealthy dysfunction, you need to take immediate action to resuscitate the board and save your organization. This workshop will begin with a frank discussion of the symptoms and characteristics of three types of troubled boards, followed by an overview of treatment options and interventions to restore health to your board and hope to your organization.

Key Competency: Planning for the Future

Presenter: **Kevin Monroe, MA**



Certificate Track: Communications

Marketing 101. How to Grow: Lessons from the Apple Tree

Like the apple tree, non-profits bear fruit for others. Knowing your core business helps you find new resources within and attract new

resources from the outside. You'll learn about ego-branches, suckers and pruning to help you do what you do best. You'll find out why good ideas kill non-profits and how to avoid giving blank checks to "mission," and you'll get tools to bear more fruit for those you serve.

Key Competency: Relationship Building

Presenter: **Laura Willumsen, MM**



Certificate Track: Nutrition

Dietary Guidelines 2010—Translating Research to Application

(Senior Nutrition Institute—Basic Skills)

The 2010 Dietary Guidelines for Americans were released in January of this year. Highlights of the recommendations of the new Dietary Guidelines for Americans, emphasizing those that apply to older adults and their application to the Older Americans Nutrition Program will be discussed. The session will focus on the scientific basis of the Dietary Guidelines, the relationship of the Dietary Guidelines and the Dietary Reference Intakes, the use of the Dietary Guidelines to improve health and wellbeing as well as meeting the requirements of the Older Americans Act. The session will include an interactive discussion and participants will have the opportunity to ask questions.

Key Competency: Foodservice Knowledge

Presenter: **Jean Lloyd, MS, RD**



Certificate Track: Volunteer Management

Positioning Your Agency for the Volunteers of Tomorrow

Do you have a strategic plan for involving volunteers over the next decade? As a key decision-maker for your organization, do you give as much attention to raising people as you do to raising money? This session will examine the key trends, issues and executive-level decisions necessary to tap the enormous potential of community participation. Participants will identify key actions needed from executives to support volunteering across the whole organization, including resource allocation, staffing, policy setting and enforcement; learn to develop an intentional strategy to strengthen volunteer engagement and tap new forms of community resources and talents; and challenge assumptions based on yesterday's volunteering.

Key Competency: Planning for the Future

Presenter: **Susan J. Ellis, MA**

WEDNESDAY

9:00 a.m. – 10:30 a.m.



Certificate Track: Financial Management

Budgeting and Cash Management for the Non-Profit Organization—Part 3
(Advanced Financial Management Institute)

See description under Budgeting and Cash Management for the Non-Profit Organization—Part 1.

Presenter: **Robert J. (Bob) Kollar, MA, CPA**

10:30 a.m. – 10:45 a.m.

Refreshment Break

10:45 a.m. – 1:45 p.m.

Common Goods Expo

This year's Common Goods Expo is a dynamic marketplace of vendors offering the products and services you need to serve your clients. Sample products and learn how to put more money back into your program by ordering through Common Goods. Come with questions and an empty stomach, as food samples from vendors will be available, and our vendors are looking forward to meeting you.

1:45 p.m. – 2:00 p.m.

Refreshment Break

2:00 p.m. – 5:15 p.m.

Concurrent Intensive Workshops



Certificate Track: Strategy & Governance

Leading Strategic Change in Your Organization
(Board/Executive Director Institute)

Strategic thinking and planning is a business imperative for senior leaders and board members of any organization, regardless of its size or mission. But strategic thinking and planning is often the first initiative that drops off the radar screen when an organization faces an economic, people or business crisis. How do you balance the need to manage today's concerns while still allowing enough time to envision and plan the future? In this session you will explore the tension between the need to "plan" and the desire to "do," identify different models for strategic thinking and planning that work—regardless of the budget or mission of the organization; highlight ways to have thoughtful strategic conversations with diverse stakeholders; discuss lessons learned from planning efforts at your own organizations; share best practices and collectively identify resources for future planning.

Key Competency: Planning for the Future

Presenter: **Becky J. Frederick, JD**



Certificate Track: Nutrition

Put Some Appeal into Your Menus: Making Food Fun

The 2010 U.S. Dietary Guidelines recommend that Americans include more fruits and vegetables in their diets. However, planning cost-effective menus that include a variety of fruits and vegetables can be a challenge for Senior Nutrition Programs. This demonstration-format session will provide tips for healthier meals by increasing fruits and vegetables. The presenter will also provide food purchasing, preparation and merchandising information that can be used to create menus that are both appealing and nutritious. Don't miss this lively workshop that will help you put that "yum" factor into your menus.

Key Competency: Foodservice Knowledge

Presenter: **Cyndie Story, PhD, RD, CC**



Certificate Track: Development & Fundraising

Three Dimensions of Sustainability Planning to Remain Viable in Today's Economy

Reduced availability of funding and a stalled economy make it difficult for Senior Nutrition Programs of all sizes to obtain funding for continuing or expanding the services that your communities and clients have come to count on. In this environment, sustainability planning is more urgent than ever. This interactive workshop teaches principles and practices that promote program sustainability. Participants will develop an understanding of and framework for sustainability planning; understand three elements required to sustain programs and services and explore strategies for enhancing the sustainability of their MOW program. Additionally, participants will identify the strengths of their program and develop an action plan to enhance its sustainability.

Key Competency: Planning for the Future

Presenter: **Kevin Monroe, MA**



Certificate Track: Volunteer Management

Changes in Volunteering Means Changes in Volunteer Management

It's not your grandmother's volunteering! Today's volunteer world is evolving as rapidly as everything else—are you keeping pace? What do concepts such as entrepreneurial volunteering, micro-volunteering, IYV+10, skill-anthropy, online recruitment, and

WEDNESDAY

2:00 p.m. – 5:15 p.m.

“A Billion + Change” pro bono initiative mean to you? This session will provide you with an overview of how volunteer management practices are adapting, which approaches you should not change, as well as those that you must change.

Key Competency: Planning for the Future

Presenter: **Susan J. Ellis, MA**



Certificate Track: Communications

Marketing 102. Build Your Base of Support: Marketing that Works

“We need more money! We need more donors!” These vague goals spawn vague marketing plans whose only guaranteed outcome is that you’ve spent money. Learn how to grow your base of support with a cost-effective marketing plan that acquires, renews and retains your patrons with targeted communications. This intensive workshop builds on principles covered in the *Marketing 101. How to Grow* session.

Key Competency: Relationship Building

Presenter: **Laura Willumsen, MM**



Certificate Track: Financial Management

Monitoring the Effectiveness of Your Non-Profit Organization and Fraud Prevention

(Advanced Financial Management Institute)

What measures can your organization use to determine whether or not you are fulfilling your mission? Come prepared to discuss your organization’s long-term strategic plan, and whether or not your financial resources and financial practices are adequate to support achievement of your long-term plan. You will learn about reporting measures such as financial ratios, non-financial measures, and dashboards. You will work on an exercise to develop a dashboard that can be used by your staff and board of directors. Then, we will talk about fraud risk and review the various types of fraud: asset misappropriation; fraudulent financial reporting; and corruption (bribery, kickbacks). You will be presented with Statistics from the Association of Certified Fraud Examiners’ Report to the Nation and share specific examples of non-profit frauds. You will work in groups to assess and develop responses to several fraud risk scenarios for your program.

Key Competency: Fiscal Responsibility

Presenter: **Robert J. (Bob) Kollar, MA, CPA**

6:00 p.m. – 10:00 p.m.

Special Event at the Museum of Science and Industry

5:30 p.m. – 6:30 p.m.

Transportation to the Event

We have reserved several buses to transport you to the Museum of Science and Industry for the Special Event. Groups will assemble in and depart from the hotel lobby. Please check the Agenda-at-a-Glance for information on your designated departure group.

6:30 p.m. – 10:00 p.m.

A Night at the Museum

The Museum of Science and Industry is the largest science museum in the Western Hemisphere. MOWAA Members will have private access to two permanent exhibits: *Science Storms* and *The Great Train Story*.

Science Storms is a dramatic exhibit, which reveals the extraordinary physics and chemistry behind some of nature's most compelling phenomena. Investigate the basic scientific principles responsible for nature's biggest wonders while you get a hands-on, up-close look at tornadoes, lightning, fire, tsunamis and so much more.

The Great Train Story is an interactive exhibit that vividly depicts the winding journey by rail from Chicago to Seattle. Visit the exhibit and virtually drive a Metra Train, open a drawbridge over the Chicago River, harvest timber in the Cascades Range and bore a tunnel through the Rocky Mountains.

After enjoying a private tour with your fellow MOWAA Members, gather in the Museum's Rotunda for a night of delicious food and great entertainment.

Bus transportation to return to the hotel will be provided from 8:45 p.m. onwards. Board the buses by going to the Main Entrance of the Museum from the Rotunda.

THURSDAY, SEPTEMBER 1

8:30 a.m. – 9:30 a.m.

Breakfast, MOWAA Business Meeting and Installation of Officers

Join us for breakfast as we review what has been accomplished in 2011 and look forward to realizing our vision of ending senior hunger by 2020. Welcome new members to the MOWAA Board and honor your peers as a community of professionals in the field of senior nutrition.

THURSDAY

9:30 a.m. – 10:15 a.m.

Keynote Session

Grandparents: Healthy Habits Motivators for Young Children the Sesame Way

Keynote Speaker: H. Melvin Ming, chief operating officer, Sesame Workshop

Grandparents are key role models and motivators for young children's development in health and nutrition. Using Sesame Street research and resources, grandparents will have tools to encourage young children's healthy choices during everyday moments and interactions. With over 800,000 grandparents as main caregivers of children, and many facing food insecurity, there are also ways to maintain healthy options on a limited income using Sesame strategies influencing children's life long habits.

10:15 a.m. – 10:30 a.m.

Break

10:30 a.m. – 12:00 noon

Concurrent Sessions



Certificate Track: Strategy & Governance

Legal Risk Management for Non-Profits

Non-profits too often view legal risk management in terms of crisis—and their ability to react to funding cuts, accidents, labor disputes and other unexpected events. While it is important to learn to expect and prepare for the unexpected, it is equally important to have a strategic view of legal risk. Non-profits must grow and innovate to survive over the long term. Yet, new initiatives necessarily involve taking calculated risks. Attend this course to learn how to assess and understand those legal risks, determine your organization's appetite for risk taking and move forward with successful strategies that will advance your mission while protecting your organization.

Key Competency: Organizational Planning

Presenter: **Jeffrey S. Tenenbaum, Esq.**

Facilitator: **Robert T. Herbolsheimer, Esq.**



Certificate Track: Nutrition

Breathing New Life into the Congregate Program

(Senior Nutrition Institute—Basic Skills)

Many programs across the country are experiencing a decline in participation at congregate sites, but the program is not dead yet. The congregate program provides community-living seniors

an opportunity for socialization, health education and promotion activities, as well as the provision of nutritious meals. Join in a panel discussion about innovative approaches that can be used to reinvigorate your congregate dining program while reinforcing its value to the seniors you serve. During this session, panel members will discuss techniques for matching client needs with program services and activities; identify successful innovations and explain the process for implementing the changes.

Key Competency: Foodservice Knowledge

Panelists: **Deborah (Debbie) Britt**; **Carlene Russell, MS, RD, LD, CSG, FADA** and **Edward (Ted) Trainer, PhD**



Certificate Track: Communications

Copywriting: How to Write an Appeal that Gets Results!

The pen still has power—if you know how to use it correctly. Come to this session and learn how to develop the most effective messages for direct mail and online fundraising. You'll see examples of great letters—and not-so-great letters. You'll learn step-by-step how to edit a lackluster letter into one that will raise more money and discover the most successful themes and general messages that can apply to a variety of Meals On Wheels providers. Led by professionals who helped Meals On Wheels organizations raise over \$6 million dollars last year, this hands-on session will cover crafting an effective letter opening, strong ask and a great P.S. (yes, it's important). You'll learn how direct mail and online messaging are both similar and different. Join us and add a little more power to your pen.

Key Competency: Revenue Development

Presenters: **Lynn Mehaffy, CFRE** and **Lisa Maska, CFRE**



Certificate Track: Communications

Creative Marketing at the Local Level

Limited budget? Big goals? Whether you are a two-person agency or a team of 20, learn creative strategies that will help you achieve results at the local level. This course will help you understand the elements of a good marketing plan; identify your stakeholders and learn how to get them involved; develop strategies for establishing good media relationships at the local level and explore cost-effective ideas and ways to measure success.

Key Competency: Relationship Building

Presenter: **Jerry Arellano**

THURSDAY

10:30 a.m. – 12:00 noon

Additional Session

Good Questions for Good Health: How to Implement Health Literacy Coaching into Your MOW and Senior Center Programs

This hands-on workshop, presented by researchers from the University of Georgia, will teach Meals On Wheels and senior center staff how to implement a health literacy intervention into their meal delivery program. This intervention trains volunteers and staff to be health literacy coaches and teach their clients interactive communication skills to use with healthcare providers. The results are more proactive patients who can better manage chronic diseases and avoid medication errors. Attendees will receive the training and materials they need to implement this intervention in their own programs. The Good Questions for Good Health program was developed from a research grant funded by the National Institute on Aging.

Presenters: **Vicki S. Freimuth, PhD** and
Teresa B. (Terry) Kaley, MA, RD, LD

12:00 noon – 12:15 p.m.

Break

12:15 p.m. – 1:00 p.m.

Box Lunch and “Ask the Non-Profit Lawyer”

This is your chance to “ask the non-profit lawyer” anything you want to know about non-profit law. A seasoned veteran on non-profit legal matters will be ready to answer your most pressing questions in this Q&A session. From tax exemption to employment law, to contracts, to corporate governance, to copyrights and trademarks, this is an invaluable opportunity you will not want to miss.

Presenter: **Jeffrey S. Tenenbaum, Esq.**

Facilitator: **Robert T. Herbolsheimer, Esq.**

1:00 p.m. – 2:30 p.m.

Community Fair for the Common Good

Enjoy the opportunity to swap great ideas and network with your peers in the senior nutrition field at the Community Fair. At the Fair, MOWAA Members will showcase their program’s best practices, campaigns and more with tabletop presentations. In addition, MOWAA staff will be available to respond to any questions you might have regarding MOWAA initiatives and benefits. This is your chance to ask questions about the MOWAA Studio, Common Goods, the Center and much more.

We hope you will join us, because who knows? You might just go home with your next bright idea for your local program!

2:30 p.m. – 3:00 p.m.

American Volunteer Awards and Ice Cream Social

At last, the long-awaited moment, when we announce the American Volunteer Awards for 2011. Join us for ice cream and a celebration of our amazing volunteers. After the award ceremony, the 2011 Conference will officially close and you can go and explore and enjoy everything Chicago has to offer.

3:15 p.m. – 5:00 p.m.

MetLife Grantees Meeting

» *By Invitation Only*

This session is an opportunity for those MOWAA Members participating in the MetLife grant pilot project to meet and share ideas with MOWAA staff and each other.

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KEYNOTE SPEAKERS



TED FISHMAN

Ted is the author of *Shock of Gray: The Aging of the World's Population and How it Pits Young Against Old, Child Against Parent, Worker Against Boss, Company Against Rival, and Nation Against Nation* (October 2010). His book presents a provocative look at how the aging of the world is propelling globalization, redefining nearly every important relationship we have and changing life for everyone young and old.

Ted is a veteran journalist and former commodities trader who has a wide range of knowledge about the world economy. He has been featured on ABC, CNN, Fox, the BBC, CNBC, PBS and NPR, while his essays and reports have appeared in many of the world's most prominent journals, including *The New York Times* magazine, *USA Today*, *National Geographic*, *Harper's*, *Esquire*, *INC* and *The Times* of London.

Ted is a graduate of Princeton, and in 2007 he was a visiting scholar at Stanford University Center on Longevity.



JO ANN JENKINS

Jo Ann is president of the AARP Foundation, AARP's charitable arm, which is dedicated to helping struggling, low-income older Americans meet their basic needs for food, shelter and medical care. The AARP Foundation serves more than five million vulnerable seniors every year.

Jo Ann came to the AARP Foundation from the Library of Congress, where she was its chief operating officer. She is recognized for launching innovative, dynamic and far-reaching initiatives, including spearheading the new "Library of Congress Experience." The project garnered several national and international awards, solidifying her reputation as a recognized leader who brought transformational change to one of America's oldest and most beloved institutions.

Most recently, Jo Ann was one of 11 recipients of the 2010 11th Annual Women in Technology Leadership Award, honoring women who have excelled as mentors, leaders and role models and embody the Women in Technology mission to advance women in technology from the classroom to the boardroom.



H. MELVIN MING

Mel is the chief operating officer at Sesame Workshop, where he coordinates and aligns the efforts of the Workshop with its stated strategic direction and short-term goals. Mel oversees the content, product licensing, research and communications and business strategies of the Workshop.

Prior to joining the Workshop's management team in 1999, Mel was the chief financial officer of the Museum of Television and Radio in New York from 1997 to 1999, chief operating officer at WQED Pittsburgh from 1994 to 1996, and from 1984 to 1994, chief financial officer and chief administrative officer at Thirteen/WNET New York. From 1983 to 1984, Mel served as vice president, finance and administration at National Public Radio in Washington, D.C.

Mel, a CPA, graduated from Philadelphia's Temple University and spent his early business career with Coopers and Lybrand in Philadelphia and Washington, D.C.

We at MOWAA are proud to be working with Mel and the Sesame Workshop to promote intergenerational nutrition and healthy habits for life.

PRESENTERS



AMY ANDERSON

Amy is a postdoctoral researcher in the Department of Nutrition and Food Science at the University of Maryland.

> She earned a PhD in nutrition from the University of Maryland and a BA from Stanford University.



JERRY ARELLANO

Jerry is the marketing and communications director for Christian Senior Services in San Antonio, TX. He joined Christian Senior Services in January 2010 to develop a comprehensive marketing plan to support all three agency programs. He has seven years of marketing experience across diverse platforms including print, broadcast and digital.

> Jerry is a graduate of the University of Texas at Austin and earned a Certificate in Communications from MOWAA's National Center for Nutrition Leadership.



DEBORAH (DEBBIE) BRITT

Debbie is president and CEO of Fayette Senior Services, Inc. in Fayette County, GA. Previously, she served as vice president of corporate communications for Porex Corporation, a subsidiary of WebMD Health Corp. and owned BrittIdeas, a marketing and business development consultancy. Debbie is a board member of the Fayette Chamber of Commerce and president-elect of the Meals On Wheels Association of Georgia.

> Debbie attended the Kendall College of Art and Design of Ferris State University.



SUSAN J. ELLIS

Susan is president and founder of Energize, Inc., a training, consulting and publishing firm that specializes in volunteerism. She has assisted clients around the world in creating and strengthening their volunteer corps. She previously served as editor-in-chief of *The Journal of Volunteer Administration*, has authored numerous books and articles on volunteerism and writes a bi-monthly column for *The NonProfit Times*.

> Susan holds an MA from the University of Pennsylvania.



BECKY J. FREDERICK

Becky is the founder of Workplace Strategy, working with clients to develop high-performance workplaces. She is a licensed attorney and has over 20 years of experience in non-profit and corporate workplaces and has served as interim executive director for several healthcare administration associations. Her expertise includes strategic planning and organizational assessment.

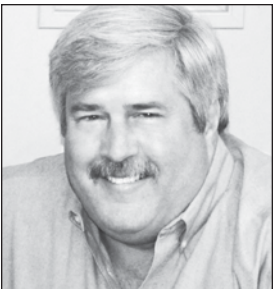
> Becky earned her BA from Cornell College and her JD from Indiana University.



VICKI S. FREIMUTH

Vicki is the principle investigator on the Center For Disease Control (CDC) funded Center for Excellence in Health Marketing/Health Communication. Previously, she was the first director of communication at CDC, and she ran one of the first academic university training programs in health communication (University of Maryland).

> Vicki earned her BS from Eastern Illinois University, her MA from the University of Iowa and her PhD in communication theory and research from Florida State University.



ROBERT T. HERBOLSHEIMER

Bob is MOWAA's vice president and general counsel. He has practiced law for over 20 years, concentrating in the areas of legislative and administrative, corporate, non-profit organization, labor and employment and environmental law. Bob established the Herbolsheimer Law Offices in Washington D.C. in 1998.

> Bob earned a degree from Carleton College and his JD from the Hamline University School of Law.



LAURA HUTH

Laura is president and CEO of *do good* Consulting, specializing in creative and affordable fundraising and marketing techniques. Her nearly 20 years of non-profit experience includes founding the Illinois Student Environmental Network and serving as executive director of Habitat for Humanity of Champaign County.

> She is a graduate of Bradley University with a degree in political science/pre-law and sociology.



MARGARET B. (PEGGY) INGRAHAM

Peggy is MOWAA's senior vice president for public policy, serving as MOWAA's liaison to Congress, the Administration and other organizations in the aging network. Previously, she held several positions in the public sector, including deputy assistant secretary for legislation at the U.S. Department of Health and Human Services.

> She earned her BA from Vanderbilt University and her MA in English from Georgia State University.



TERESA B. (TERRY) KALEY

Terry is a program manager for the University of Georgia Center for Health & Risk Communication, and she has managed multiple community-based health promotion programs. A registered dietitian, Terry is the current president of the Georgia Dietetic Association, an affiliate of the American Dietetic Association.

> Terry received a BS in foods and nutrition from Georgia State University and an MA in health promotion and behavior from the University of Georgia.



ROBERT J. (BOB) KOLLAR

Bob is a CPA with over 27 years of business and public accounting experience. Together with his wife, he owns Kuhleman Kollar & Associates CPAs, P.C., an accounting and business consulting firm. He was appointed director of the Master of Accountancy Program in Duquesne's John F. Donahue Graduate School of Business.

> Bob received his bachelor's and master's degrees in business administration from Duquesne University.



RUSSEL A. (RUSS) KOST III

Russ is vice president for development at the Desert Research Institute. Previously, he served as associate vice president of alumni relations and development at the University of Nevada, Las Vegas and as executive director of its Alumni Association. He is chairman of the Council for Advancement and Support for Education District VII and is a member of the board of trustees for the Las Vegas Art Museum Foundation.

> Russ has a BS in communication studies from the University of Nevada, Las Vegas.



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JEAN LLOYD

Jean has served as the national nutritionist of the U.S. Administration on Aging since 1992. During her tenure, she has provided input for the nutrition-related functions of policy, budget, legislation and regulation; program development; training and technical assistance; advocacy; evaluation; and research, demonstration and training grants.

> Jean has a BS in English education and an MS in human nutrition from Ohio State University.



LISA MASKA

Lisa is a partner at Lautman Maska Neill & Company. She began her direct mail career managing new donor acquisition campaigns for CARE, a leading humanitarian organization that fights global poverty. She also ran the annual fund for the Visiting Nurse Service of New York. She serves on the boards of the Association of Fundraising Professionals' Washington, DC Chapter and the Direct Marketing Fundraisers Association.

> Lisa holds a BA in English Literature from Rice University in Houston, TX.



AUDREY MCCOOL

Audrey is a professor emeritus at the University of Nevada, Las Vegas. Prior to entering the education field, she spent 20 years in healthcare foodservices. She has taught courses and written many publications on foodservice management and nutritional care, and she was a consultant to the Congressionally-mandated evaluation of the Nutrition Programs for Older Americans, co-authoring the project report.

> She has an MS from the University of Illinois and an EdD from Texas Tech University.



STACEY MCKEEVER

Stacey is a management, strategy and program specialist at *do good* Consulting. She previously worked to increase access to HIV care and treatment at the William Jefferson Clinton Foundation and directed public health research at Albert Einstein College of Medicine.

> She graduated from Sarah Lawrence College, and she earned an MBA from Columbia Business School and an MPH from the Mailman School of Public Health of Columbia University.



LYNN MEHAFFY

Lynn is an account supervisor at Lautman Maska Neill & Company, where she has managed direct mail campaigns for clients such as Ronald McDonald House of New York, ACCION International and Coalition for the Homeless. She also manages the firm's Meals On Wheels National Co-op, a consortium of more than 22 regional meal providers across the United States.

> She is a graduate of West Virginia University's Perley Isaac Reed School of Journalism.



KEVIN MONROE

Kevin is the founder and managing partner of X Factor Consulting, LLC, helping non-profits identify and implement best practices of organizational and leadership development. He also serves as a consultant to the Substance Abuse and Mental Health Services Administration of the U.S. Department of Health and Human Services and is on the board of the National Institute for Learning Development.

> He holds a BA from Mercer University and an MA from Gonzaga University.



LINDA NETTERVILLE

Linda is MOWAA's vice president for grants management. Her 25 years of experience in nursing homes and community-based nutrition programs includes being state nutritionist for the Texas Department on Aging and executive director of a rural nutrition program. She has previously served as president of MOWAA and chairman of Gerontological Nutritionists—a Practice Group of the American Dietetic Association.

> She received a BS from the University of Missouri and an MA from the University of Texas.



JOANNA NIXON

Joanna is a consultant with Achieve LLC. Prior to this, she served as vice president for grantmaking for the Central Indiana Community Foundation, where she developed grantmaking strategies and managed the distribution of \$12 million in grants to more than 600 non-profits annually.

> She holds a bachelor's degree in social work from Indiana University.



CARLENE RUSSELL

Carlene is the nutrition program manager at the Iowa Department on Aging. She has over 35 years of experience as a registered dietitian in nutrition programs serving older adults across the continuum of care. She has been active in the American Dietetic Association and recognized for her contributions with several awards.

> Carlene earned a bachelor's degree from the University of Nebraska and a master's degree from Iowa State University. She is a Certified Gerontological Nutrition Specialist.



NADINE SAHYOUN

Nadine is an associate professor in the Department of Nutrition and Food Science at the University of Maryland. Her research focuses on assessing the nutritional status of the older adult population and studying the relationship between nutrition and health in this population.

> Nadine received a BA from the University of Massachusetts, an MS from the University of Iowa and a PhD from Tufts University School of Nutrition.

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CYNDIE STORY

Cyndie is a registered dietitian and culinarian, with over 20 years experience as a school foodservice director, coordinator, consultant and trainer. She provides hands-on and demonstration-style quantity food production classes, food safety consultations and training, train-the-trainer course development and custom training video productions.

> Cyndie has a PhD in food and lodging management from Iowa State University's Child Nutrition Leadership Academy.



JEFFREY TENENBAUM

Jeffrey is a partner at Venable LLP and chairs its Nonprofit Organizations Practice Group and its Credit Counseling and Debt Services Industry Practice Group. He previously served as Legal Section manager at the American Society of Association Executives, following several years working on Capitol Hill.

> He earned his JD from the Catholic University of America and his BA from the University of Pennsylvania.



EDWARD (TED) TRAINER

Ted is the director of healthy aging at Southern Maine Agency on Aging. Previously, he was a project officer for the Maine Cardiovascular Health Program, and he has worked as a program manager for the United Nations Population Fund and Children's Fund (UNICEF).

> He received a bachelor's degree from Harvard College and a master's degree and doctorate in public health from the University of North Carolina at Chapel Hill.



KRISTIN CARLSON VOGEN

Kristin Carlson Vogen is a senior vice president and senior institutional philanthropic specialist with Institutional Investments & Philanthropic Solutions at Bank of America Merrill Lynch. She serves on the planned giving advisory committee for Chicago's Public Broadcasting Service affiliate WTTW, the Museum of Science and Industry and Chicago Zoological Society.

> Kristin earned a BA from Abilene Christian University and a JD from the William Mitchell College of Law.



LAURA WILLUMSEN

Laura is a senior consultant for TRG Arts. Previously, she has served as director of marketing and public relations for the Pittsburgh Opera, senior consultant with the Nonprofit Leadership Institute at Duquesne University and executive director of the Pittsburgh Center for the Arts.

> She has a master's degree from Penn State University and is a graduate of Leadership Pittsburgh and the Katz Business School Entrepreneurial Fellows Program.

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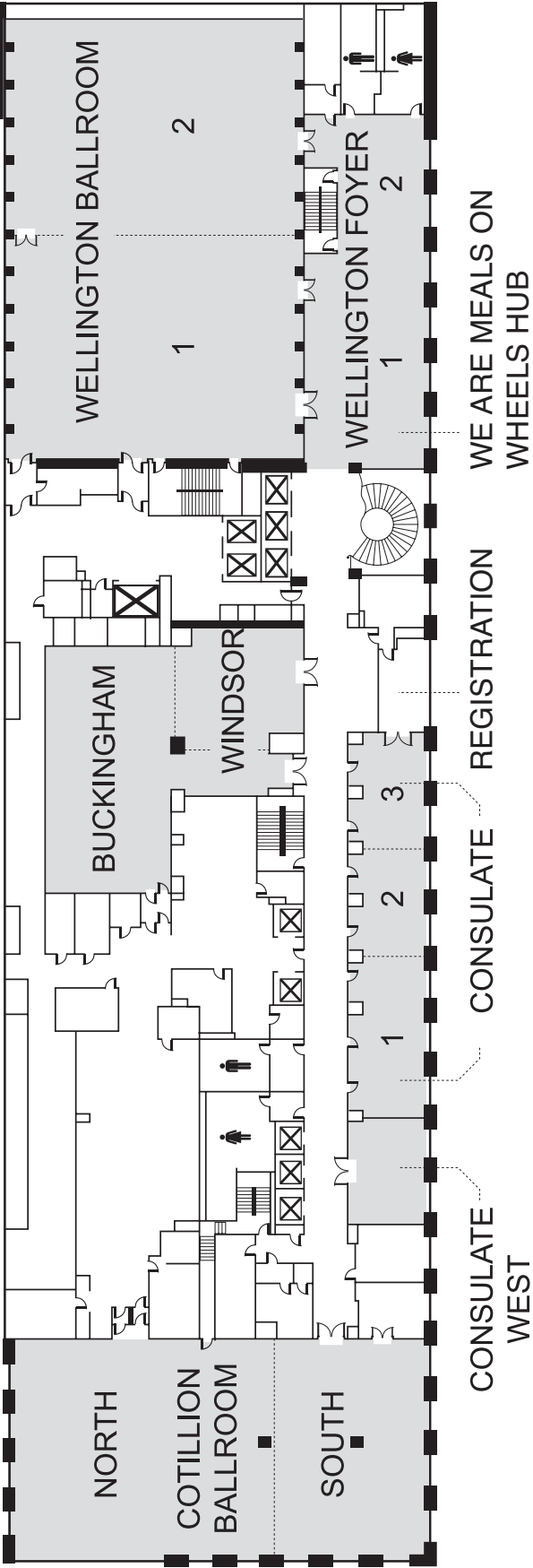
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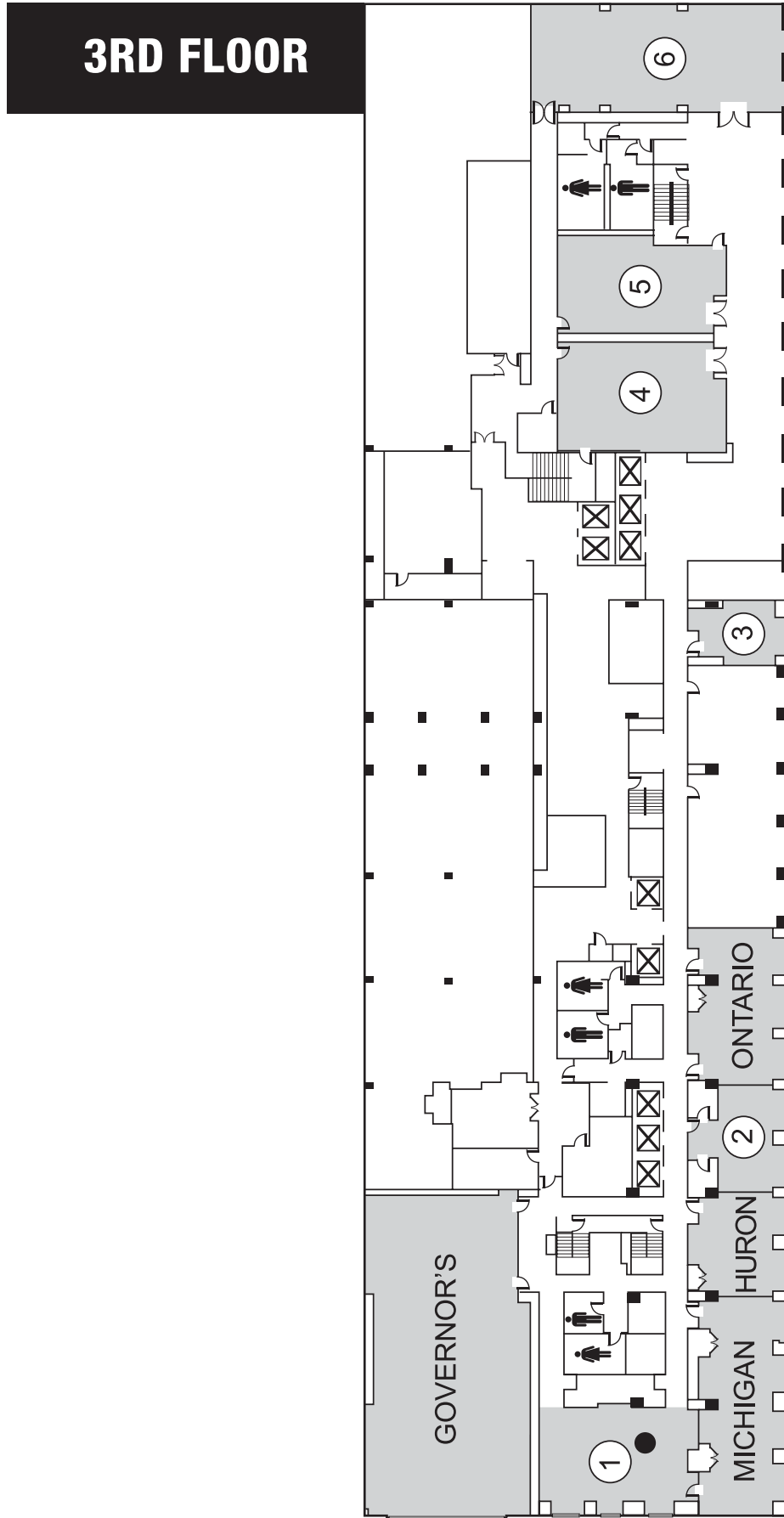
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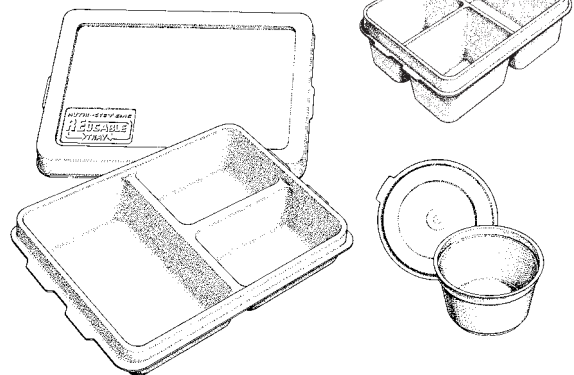


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