Results That Matter: Increased and Sustainable Impact With Purposeful Partnerships

JDRF One Conference
November 19, 2019
Setting Our Collective Purpose

Aaron J. Kowalski, Ph.D.
Thank You! 2019 Was A Great Year!

2019 was a tremendous year:

• Fundraising achieved $206M, which was above budget
• Over $100M invested in T1D Research
• We achieved strong bipartisan support of Special Diabetes Program

Thank you for leading through change! The resolve, resourcefulness and laser focus on fueling mission is unparalleled!

But There is More to do:

• Our community still needs a cure
• It’s a time of tremendous scientific opportunities
Culture is a Key Driver for Our Success
Improving Culture is a Top Priority for Me

My goal is to have a culture where:

- People are empowered to make decisions
- New ideas and solutions can be brought to the table
- Collaboration is commonplace
- High performance is expected

As leaders:

- We must strive to sustain a culture that delivers on our mission
- Encouraging actions and behaviors that are critical to a high-performing organization

It begins with us!
WHY WE EXIST

**MISSION**
Improving lives today and tomorrow by accelerating life-changing breakthroughs to cure, prevent and treat T1D and its complications

WHAT WE DO
(Unique Value Proposition)

**STRATEGIC ACTIVITIES**
- Driving Discovery Research
- Accelerating Translational Research
- Enabling Access
- Supporting People with T1D
- Partnering with Health Care Professionals
- Connecting and Mobilizing the T1D Community

HOW WE DO IT
(Putting our Values into Action)

**GUIDING PRINCIPLES**
- Own and Act with Courage
- Persevere and be Unstoppable
- Make and See a Real Difference
- Engage, Involve and be Stronger Together

A HIGH PERFORMANCE ORGANIZATION
Motivated, empowered and engaged colleagues, driving an efficient and effective culture

OUR MISSION

DRIVING HIGH PERFORMANCE, DELIVERING IMPACT

ALIGNED ACTIONS AND BEHAVIORS
Powered by our individual strengths
Performed every day by people, teams and the organization as a whole

OUR GUIDING PRINCIPLES

OUR STRATEGIC ACTIVITIES
Guiding Principles
That Put Our Values Into Action

OWN & ACT WITH COURAGE
By taking initiative, ownership and responsibility

OWN IT AND COMMUNICATE IT
Make your ownership and your plan clear

MAKE IT HAPPEN
Executive and deliver, even through adversity, and appreciate results

BE THE INSPIRATION
Inspire and influence with your views and your actions

PERSEVERE & BE UNSTOPPABLE
By pursuing solutions to every challenge - always seeking to adapt, improve, and bring new solutions to life

BE THE CHANGE
Take the lead in bringing new ideas and solutions to life

DELIVER BETTER, EVERY DAY
Continuously improve; adjust and adapt

MAKE CHANGE HAPPEN
Make innovation and change a normal part of the process

ENGAGE, INVOLVE & BE STRONGER TOGETHER
By encouraging involvement, inclusivity, understanding and collaboration

BE STRONGER TOGETHER
‘ONE JDRF’ – Bring in others and collaborate beyond the silos

BUILD POSITIVE RELATIONSHIPS EVERY DAY
Partnerships through relationships not transactions

ENGAGE WITH CONVERSATIONS
Listen to understand, encourage dialogue, open to diverse views

MAKE & SEE A REAL DIFFERENCE
By defining, delivering and demonstrating results that matter

TARGET RESULTS THAT MATTER
Define your stretch and your plan to achieve it

MAKE THE DIFFERENCE
Commit to deliver impact and follow through with tenacity

STAY ON MISSION
Seek strategic impact, not just tactical actions
One JDRF

Cynthia Rice and Sandra Hijikata
Building long-term relationships is critical to our success.
Goal: A Larger, More Impactful Network
Through Engagement & Partnerships, JDRF Will:

- Raise more funds
- Enlist others on behalf of our mission
- Leverage more resources
Our Needs-Based Model: Putting Supporters at the Center
A needs based approach requires us to:

- **Lead** with mission, because this is our north star
- **Take** a holistic approach to accelerate JDRF’s progress
- **Collaborate** across the entire organization as integrated partners, accountable to each other
JDRF is focused on **Curing T1D** and **Improving Lives**.

Through **Research**, **Advocacy and Community Engagement**, JDRF fights to cure T1D and improve the lives of the T1D Community.
How JDRF Accelerates Cures and Improves Lives

Driving Discovery Research

Accelerating Translational Research

Enabling Access

Supporting People with T1D

Partnering with Healthcare Professionals

Connecting and Mobilizing the T1D Community

Curing T1D

Improving Lives
thank you
preconference
design team

- Karen Abrahamson
- Jill Clark
- Katie Doyle
- Kelly Fleming
- Megan Gavin
- Liz Mullane
- Elizabeth Sullivan
Session Contributors

- Jennifer Bennett
- Larry Meisner
- Panelists:
  - Kathy Cleeland
  - Maureen Fitzgerald
  - Laura Rosseisen
CEO Question & Answer
Overview of the Day

Karen Abrahamson and Liz Mullane
Icebreaker
<table>
<thead>
<tr>
<th>Time</th>
<th>Agenda Item</th>
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<tbody>
<tr>
<td>9:30 am - 9:45 am</td>
<td>Overview of the Day</td>
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<tr>
<td>9:45 am - 11:30 am</td>
<td>Unique Value Proposition (UVP)</td>
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<td>10:20 am - 10:25 am</td>
<td>Break</td>
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<tr>
<td>11:30 am - 1:30 pm</td>
<td>Working Lunch: Crafting Supporter UVP</td>
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<td>1:30 pm - 2:30 pm</td>
<td>Group Share Out</td>
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<td>2:30 pm - 3:00 pm</td>
<td>Taking it Home</td>
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<td>3:00 pm - 3:15 pm</td>
<td>Key Insights and Closing Remarks</td>
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<tr>
<td>3:15 pm - 3:30 pm</td>
<td>Break</td>
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<tr>
<td>3:30 pm - 5:00 pm</td>
<td>Cohorts meet by Market Size</td>
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</table>
• Introduce and understand JDRF’s *Unique Value Proposition* (UVP) through MRMS lens to enhance your impact in support of JDRF organizational priorities

• Practice crafting unique value proposition(s)

• Learn the skills needed to execute a needs-based, donor-centric approach and receive shared tools and resources to lead your team and volunteers and model how to maximize relationships

• Learn peer best practices and the art of a needs-based approach for sustainable success
Meeting Agreements

• Stay present, focused and committed
• Be open, have a curious mindset: Ask “why, why not, what if?”
• Listen … and listen for understanding
• Assume positive intent
• Share your stories, thinking, ideas and perspectives fully
• Share the air with others
• Don't leave in silent disagreement
• Agree to disagree
• Take care of your needs and step out if needed
Ink Factory
Graphic Illustration
Ambassadors

- Amy Camp
- Taran Connelly
- Mitzi Ellis
- Hannah Hoogenboom
- Lauren Kennedy
- Kristina Linden
- Sarah Noel
- Mike Somers
Introduction to the Supporter
Unique Value Proposition

Katie Doyle and Larry Meisner
What is a Unique Value Proposition or UVP?
Unique Value Proposition

A UVP describes the exclusive, continuous value JDRF donors will gain by supporting our cause or mission. It answers two questions:

1. What makes JDRF unique and worthy of support?

2. How is aligning with JDRF beneficial for both current and prospective donors (individuals and/or businesses) and for the community?

JDRF’s unique value proposition clarifies how donors/supporters will make a purposeful impact, bring a benefit, or create an opportunity that they won’t find elsewhere.
Through research, advocacy and community engagement, JDRF is making daily advances in our fight to Cure T1D and Improve the Lives of those living with the disease today.
How JDRF Accelerates Cures and Improves Lives

Driving Discovery Research
JDRF is the world’s largest charitable funder of T1D research. We bring together the most innovative minds across disciplines and geographies to focus on understanding the fundamental biology of diabetes so we can use this vital knowledge to find cures sooner. We enlist public, private, and nonprofit funders to support groundbreaking beta cell, immunotherapy, glucose control, and complications research—all with the goal of curing T1D and helping people stay healthy until then.

Accelerating Translational Research
Our investment in research will only achieve our objectives if it can be translated into interventions that benefit people with T1D. Working with partners across the globe, JDRF advances promising science from labs to human clinical trials to therapies that can transform lives. Through JDRF’s innovative venture philanthropy arm, the T1D Fund, we accelerate life-changing therapies and products for people with T1D through catalytic equity investments.

Enabling Access
JDRF plays an influential role in public policy to ensure that research findings are appropriately adopted by Governments and health systems. JDRF advocates for access to innovative T1D therapies that improve outcomes. Our policy experts, grassroots advocates, and allies engage with key decisionmakers to advance regulatory approval and promote health care coverage, affordability and choice of T1D therapies.

Supporting People with T1D
JDRF is often the first point of contact for newly-diagnosed individuals and their families, and offers support and resources for all ages and stages of T1D, including the Bag of Hope, educational summits, and information on topics ranging from exercise to school to emotional wellbeing. JDRF engages a range of community allies—individuals, businesses, and civic leaders—in our mission.

Partnering with Healthcare Professionals
JDRF is a trusted authority on T1D, offering accredited courses and resources for primary care physicians, endocrinologists, pharmacists, nurses, dieticians, diabetes educators and other healthcare professionals caring for those with T1D.

Connecting and Mobilizing the T1D Community
JDRF engages over a million supporters every year and provides a myriad of opportunities for the T1D community to connect and mobilize bold action. Whether through participating in inspirational events such as JDRF Ride, JDRF One Walk®, and Galas, amplifying their voice through grass roots advocacy, or leading local, national, or international initiatives, our volunteers make our progress possible.
Additional JDRF Assets

- Global Leader
- Effectively and Efficiently Leverager and Influencer
- Strategically Focused
- Community Mobilizer
- Innovative / Centers of Excellence
Leverage MRMS and UVP to customize unique needs of each supporter in building long term relationships with the greatest impact.
Mastering Relationship Management Skills
Win Win Relationship Management

Donor Focused

Self Focused

HIGH

LOW

HIGH

LOW
Why is UVP Important?

Shared Value
Building More Purposeful Partnerships
In a More Intention Way
**The Impact of Partnering**  
*Engaging with Purpose*

2018 Cone/Porter Novelli Purpose Study Key Findings:

- **78%** of Americans believe companies must do more than just make money; they must positively impact society as well.
- **77%** feel a stronger emotional connection to Purpose-driven companies over traditional companies.

- **Establish Purpose As A Priority**
- **Align Impact With Business Practices**
- **Create Loyalty Through Authentic Partnerships**

**Shared Value** is a management strategy:

- Companies find **business opportunities** in solving social problems.
- Focuses on **maximizing the value of solving social problems**.
Shared Value creates a synergistic connection between our mission, brand, assets or value proposition and their social impact needs (their purpose) to positively influence their company performance and/or reputation and our mission objectives.

This can also be used from an individual perspective on the impact they are looking to have.
The Impact of Partnering: Purpose Statements

Business Roundtable Recently Released new statement of Purpose Signed by 181 CEOs to Promote “An Economy That Serves All Americans.”

“CEOs work to generate profits and return value to shareholders, but the best-run companies do more. They put the customer first and invest in their employees and communities. In the end, it’s the most promising way to build long-term value.”

-Tricia Griffith, President & CEO of Progressive Corporation
The Impact of Partnering: Engaging with Purpose

2019 Cone/Porter Novelli Purpose Biometrics Study Key Findings

• The role of business is expanding — far beyond the operational footprint

• Values lead the way

• Consumers demonstrate stronger physical and emotional responses to Purpose messaging

• Purpose builds deeper bonds

• Purpose builds brand advocates who will readily amplify

• Purpose advocates are inspired to act

This is a perfect time for JDRF to engage with corporate partners as they are looking for meaningful partnerships to show consumers they are doing good which in turn helps them grow their business. Truly a Win for All!
The Impact of Partnering
Engaging with Purpose – Current Examples

Together, Marshalls and JDRF are positively changing the lives of those living with diabetes and improving health outcomes for people within the communities we serve.

Talking Rain

Talking Rain and JDRF are partnering to create meaningful messages and authentic storytelling to positively change the lives of those living with diabetes.

CVS Health

CVS Health and JDRF are partnering to help people with diabetes on their path to better health.

Wagner Equipment Co.

Wagner Equipment Co. and JDRF are partnering to help support research that impacts peoples live everyday with diabetes. Wagner uses this partnership to cultivate employee engagement that want to leave a legacy in the communities they serve.

This is the foundation on which we want to build and co-create partnerships with donors/supporters....starting with purpose and impact!
Where do we Start/Continue...

Discovering Potential Synergies and Shared Value
Building a Shared Value Plan

1. Use your prospective company, individual, or supporter
2. Identify their mission, values, objectives, desires, needs, etc.
3. Align them with applicable components of JDRF’s UVP
4. Fill out the **bubble chart** with shared values or **intersections**
5. Punctuate the completed bubble chart with draft **purpose statement** so you can **co-create** final version with donor/supporter
6. Plan and articulate supporter meeting using key components of the MRMS consultative process
Mastering Relationship Management Skills

The Most Important Distinction

Needs vs. Solutions
Mastering Relationship Management Skills (MRMS)
Customize Solutions

Preparation before you present to the donor:
(Needs, Solutions, Features, Benefits)

1. Capture all the needs the donor

2. Think of a solution (UVP) you will present that addresses the needs

3. Identify the most important features that address their needs

4. Correspond the benefits to each feature

(some features have more than one benefit)

1. NEEDS (Donor/Supporter)
   - To improve visibility in the community
   - Improve morale/engagement
   - Support employees dealing with T1D
   - Support loved one

2. SOLUTION (UVP)
   - One Walk

3. FEATURES (JDRF)
   - Tent, Banner, Logo on Collateral, Storytelling, Walk Team

4. BENEFITIS (Donor/Supporter)
   - Reach 10,000 potential new customers
   - Demonstrate caring management
   - Models teamwork by walking together
Mastering Relationship Management Skills (MRMS)
Customize Solutions

• Two Forms of Customization:
  • Customize the elements of a solution
  • Customize the way you talk about a solution

• Address each need:
  • Mention $ last
  • Apply to proposals

Need | Benefit | Feature

Result: Shared Value
Potential Intersections
“Bubbling”

DONOR/SUPPORTER + JDRF + Type 1 Community
Mission: Improve the health, well-being and peace of mind of those we serve.

Unique Assets within Global Health Services
Potential Intersections

- FOCUS ON MIND & BODY
- CORPORATE PARTNERSHIPS
- ACCESS TO AFFORDABLE HEALTHCARE
- KNOW YOUR NUMBERS
- MEANINGFUL ENGAGEMENT
- TECHNOLOGY ADOPTION
- TRAINING FOR HCP

DONOR/SUPPORTER + JDRF + Type 1 Community
Purpose Statement: Cigna and JDRF partnering to improve health outcomes for people living with diabetes by taking a mind and body approach.

**FOCUS ON MIND & BODY**

**Insights:** Stress causes increases in cortisol which is resistant to insulin so directly impacts A1C and time in target glucose range.

**Potential Actions:**
- Education at JDRF Community Events on importance of mental health and link between mind and body
- JDRF accredited training for HCP’s

**Desired Outcome:** Improved glucose control by increasing awareness of direct relationship between mind and body. (Collaborate to set a goal)

**TECHNOLOGY ADOPTION**

**Insights:** Two thirds of the 6 million insulin dependent people in the US are not leveraging advanced technology and only one third are achieving target blood glucose control. Using a CGM/Pump has been shown to give people with type 1 diabetes better control of their blood sugar levels, with fewer low blood sugar emergencies and ER visits.

**Potential Actions**
- Stories on how using technology changed outcomes
- Bring awareness to advancements in monitors and pumps

**Desired Outcome:** Increased time in range for people with T1D, fewer hospitalizations and ER visits and improved emotional and mental health.

**ACCESS TO AFFORDABLE HEALTHCARE**

**Insights:** Twenty-five percent of people that are insulin dependent are not using the prescribed amount of insulin because of cost.

**Potential Actions:**
- Joint press release recognizing Cigna’s leadership in advancing access and affordability for patients that are insulin dependent.
- Social storytelling and utilizing influencers to further drive awareness and action for large employers to opt-in.

**Desired Outcome:** Access for all
Purpose Statement: *Together*, Find Cure for my Loved One and all those living with Type 1 Diabetes, ASAP!

**SUPPORT**
Reassurance from the community that we are not alone. Educate our friends and family on how they can help.

**HOPE**
Showing progress that a cure is even possible.

**GIVE BACK / HELP OTHERS**
Want to help in ways that make me feel like I am making an impact.

**PREVENTION**
How can I make sure other loved ones do not get T1D?

**BEST CARE TEAM**
Help navigating new reality which is complex and many do not understand.

**HELP NAVIGATING SYSTEM**
This is expensive and I do not want money to get in the way of the best care. How do I keep up on latest advances?
Staff and Volunteer Roles in the Journey
Our Staff MBO Shift

Supporter Pipeline + Supporter Plan + Functional Vehicle Alignment = Scaled Growth
UVP in Action:
Peer Testimonial Panel

Moderator: Katie Doyle

Panelists: Karen Abrahamson, Kathy Cleeland, Maureen Fitzgerald, Megan Gavin, and Laura Rosseisen,
5 Minute BREAK
UVP in Action:
Peer Testimonial Panel

Moderator: Katie Doyle

Panelists: Karen Abrahamson, Kathy Cleeland, Maureen Fitzgerald, Megan Gavin, and Laura Rosseisen,
Crafting Supporter UVPs

Kelly Fleming and Megan Gavin
External Prospect Working Session: Building a Shared Value Plan

1. Use your prospective company, individual, or supporter
2. Identify their mission, values, objectives, desires, needs, etc. (page 2)
3. Align them with applicable components of JDRF’s UVP (page 4)
4. Fill out the bubble chart with shared values or intersections (page 3)
5. Punctuate the completed bubble chart with draft purpose statement so you can co-create final version with donor/supporter (page 3)
6. Plan and articulate supporter meeting using key components of the MRMS consultative process
Mission:

**Directions:**
Capture prospects mission (top) and place their values, priorities and unique assets in the bubble chart. We want to understand what is important to them and/or their business and profit.
Potential Partnership Shared Values (intersections)

Draft Partnership Purpose Statement:

_______________________________________________________________________________________________
_______________________________________________________________________________________________
_______________________________________________________________________________________________
_______________________________________________________________________________________________

Potential Partner + JDRF
Internal Partner Working Session:
Building Shared Value Plan – Internal Partner(s)

1. Use your prospective internal partner(s)
2. Identify your needs and if known, capture your prospective partner’s needs (page 17)
3. Begin to identify shared needs and values (page 17)
4. Develop strategies/tactics and shared goals (page 17)
5. Punctuate the shared needs and draft a purpose statement so you can co-create final version with internal partner
6. Plan and articulate internal partner meeting using key components of the MRMS consultative process

Advocacy, Community Engagement, People Team, Finance, Research, Marcom, Technology, Volunteer Engagement
Internal Partnership Profile

Partner:

1. What are your needs:
   - 
   - 
   - 
   - 

2. What are your potential partner's needs (if known):
   - 
   - 
   - 

3. Potential Strategies/Tactics
   - 
   - 

4. Goals:
   - 
   - 

5. Potential Partnership Purpose Statement:
   ___________________________________________________________
   ___________________________________________________________
   ___________________________________________________________
Working Session: Building Shared Value

12:00 pm – 1:00 pm: Team Discussions and Bubbling

1:00 pm – 1:30 pm: Create potential partnership purpose statements

*Add your potential partnership purpose statement to a big sticky note*

1:30 pm – 2:30 pm: Group share out
BREAK AND GRAB LUNCH
Start time: 12:00 pm
Working Session: Building Shared Value

12:00 pm – 1:00 pm: Team Discussions and Bubbling

1:00 pm – 1:30 pm: Create potential partnership purpose statements

    Add your potential partnership purpose statement to a big sticky note

1:30 pm – 2:30 pm: Group share out
Group Share Out
Group Share Out

1. Share *draft partnership purpose statement*
2. What *surprised* you most?
3. What is one of your *immediate next steps*?
4. Additional *questions or any resources* needed?
Volunteer Partnership in the Journey
FIND YOUR REFLECTION GUIDE

All-Staff Preconference
Results That Matter:
Increased and Sustainable Impact With Purposeful Partnerships

Reflection Guide: Preparing to Take This Home
Use this worksheet to synthesize your thinking as you reflect on the day. Bring this sheet with you to the Wednesday lunch general session to guide your table discussion with your volunteer(s).

<table>
<thead>
<tr>
<th>A. WHAT EXCITES ME...</th>
<th>C. WHAT MIGHT EXCITE YOU...</th>
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<th>B. THE POTENTIAL IMPACT ON OUR WORK...</th>
<th>D. WHERE ELSE DO YOU SEE THE OPPORTUNITY?</th>
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## Preparing for Table Discussions
### REFLECTION – What Else is Possible?

Reflect on the day and synthesize your thoughts. Capture notes you’d like to share with your volunteer(s) tomorrow.

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<td>Complete this with your volunteer(s)</td>
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</table>

Preparing for Table Discussions
PREVIEW – Bringing It Home

These questions will guide the table discussion with your volunteer(s) about bringing this home together. Preview them now in preparation for tomorrow.

- How do we do this together?
- Where do we see the easiest ways for us to implement?
- How do we help the rest of our board and event volunteers to make the shift?
- What is the first thing you will do with your staff and volunteers? *Name one concrete idea to try.*
Key Insights & Closing Remarks

Katie Doyle and Larry Meisner
### Cohort Breakout

**ALL ROOMS ARE ON THE SECOND FLOOR**

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<tr>
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- Illinois Chapter
- Greater Bay Area Chapter
- NYC/Long Island Chapter
- Michigan and Northwestern Ohio Chapter
- NJ Metro & Rockland County
- Greater Northwest Chapter
- Capital Chapter
- Los Angeles Chapter
- Minnesota and Dakotas Chapter
- Greater Delaware Valley Chapter
- New England Chapter
- Gr Western Carolinas Chpt
- Kansas City Chapter
- Middle and East Tennessee Chapter
- Houston Gulf Coast Chpt

- Westchester/Fairfield/HV
- Greater Dallas Chapter
- Indiana State Chapter
- Gr CT & Western MA Chapter
- Georgia Chapter
- Nevada Chapter
- Rocky Mountain Chapter
- Southwest Ohio Chapter
- Western PA Chapter
- Arizona Chapter
- Orange County Chapter
- Gr MO & Southern IL Chapter
- San Diego Chapter
- Nebraska-Southwest Iowa Chapter

- North Florida Chapter
- Northeast WI Chapter
- Northern CA Inland Chapter
- Oklahoma Chapter
- Oregon/SW Washington Chapter
- Palmetto Chapter
- Western Wisconsin Chapter
- Gulf States Chapter
- Central New York and Rochester Chapter
- KY & Southern IN Chapter
- Northern New England Chapter
- New Mexico Chapter

- Southern Florida Chapter
- Triangle & Eastern NC Chapter
- Central Ohio Chapter
- South Central TX Chapter
- Southeastern WI Chapter
- Tampa Bay Chapter
- Austin Chapter
- Northeast Ohio Chapter
- Piedmont Triad Chapter
- Arkansas Chapter

- Central Florida
- Northeastern NY Chapter
- Maryland Chapter
- Gr Fort Worth Arlington
- Central PA Chapter
- Virginia Chapter
- West Tennessee
- Mountain Valley Chapter
- Western New York Chapter
- Eastern Iowa Chapter
- Greater Iowa Chapter
Resources

- Research Templates
- Bubbling Worksheets
- Unique Value Proposition One Pager
- Deeper Dive Templates for each Value Area
- Ambassador Team
- Presentations to Share with Staff and Volunteers
Key Insights

• Leveraging shared value approach with donors/supporters will differentiate JDRF

• JDRF’s Unique Value Proposition can be clearly articulated through combination of Research, Advocacy and Community Engagement

• Starting with purpose builds deeper bonds, advocates, loyalty and inspires people to act
A needs based approach requires, us to

- **Lead** with mission, because this is our north star
- **Take** a holistic approach to accelerate JDRF’s progress
- **Collaborate** across the entire organization as integrated partners, accountable to each other
## Cohort Breakout

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THANK YOU

JDRF One Conference
November 19, 2019