



LEADERSHIP & STRATEGY

Thurs
5/14

PEER GROUP AGENDA

Room: National Harbor 13

9:00AM - 9:20AM

SUMMIT INFORMATION SESSION

9:30AM - 12:00PM

PEER GROUP MEETING

Jen Porett, Wipfli & Celeste James, CA James Consulting

12:00PM-1:00PM

LUNCH ON YOUR OWN

1:00PM - 2:45PM

PEER GROUP + LEADERSHIP TEAMS SESSION

Jen Porett, Wipfli

2:45PM - 3:00PM

BREAK

3:00PM-5:00PM

AI BOOTCAMP

Walter Fordham, SmartQuest Technology



5:30PM - 7:30PM

WELCOME RECEPTION

The Flight Deck - 141 American Way, Oxon Hill, MD

Leadership & Strategy Summit Session - 9:30am - 2:45pm



Jen Porett

Facilitated by **Jen Porett**, Manager for **Wipfli Advisory, LLC**, and **Celeste James**, Consultant/Advisor, **CA James Consulting**, the Leadership Peer Summit Session is designed to help leaders build high-performing teams through greater self-awareness, intentional communication, and strategic leadership development.

Participants will engage in interactive discussions and practical exercises to explore team dynamics, apply insights from a behavioral assessment, and strengthen how they adapt their communication to work more effectively with others. The session will also explore the leadership skills needed to strengthen fund development efforts, including supporting board and staff engagement, developing relationships, using data effectively, and communicating impact through compelling storytelling. Through peer learning and real-world application, participants will identify both hard and soft skill areas that support stronger leadership, organizational effectiveness, and long-term sustainability.



Celeste A James

AI Bootcamp - 3:00pm - 5:00pm

Community Action staff spend more time documenting impact than creating it. Case notes are inconsistent, CAP drafts start from scratch every cycle, and when a funder asks "where are you actually moving the needle?" — the answer takes weeks to assemble. This hands-on session puts live AI tools directly in your hands — purpose-built agents for case documentation, community planning, grant writing, and structured problem solving, all aligned to ROMA outcomes and the 10 domains of self-sufficiency.



Walter Fordham

You'll interact with each agent during the workshop and see a working AI Command Center where multiple AI partners operate together — not replacing your team, but handling the documentation grind so your people focus on the mission. Agencies using these workflows have cut CAP drafting time by more than half while improving reporting consistency across domains. You'll leave with ready-to-use prompts, a governance checklist for responsible AI adoption, and a clear picture of what you can implement the week you get home.