



CEO Summit 2025 Agenda

January 26–29, 2025 | Ponte Vedra Inn & Club | Ponte Vedra Beach, FL

Sunday, January 26, 2025

- 4:00 – 6:00 p.m. **Registration**
Conference Center Lobby
- 6:00 – 8:00 p.m. **Welcome Reception and Land Acknowledgment**
West Lawn (Outdoors)
In case of inclement weather: Stockton A & B
Join us! Reconnect with familiar faces and meet new friends while you enjoy drinks, hors d'oeuvres and the fellowship of your peers.

Monday, January 27, 2025

- 7:00 – 8:30 a.m. **Registration**
Conference Center Lobby
- 7:15 – 8:30 a.m. **Breakfast for Lutheran Connection Inc. Participants (by invitation only)**
Tarpon Room
- 7:30 – 8:30 a.m. **Breakfast**
Conference Center Lobby
- 8:30 – 9:15 a.m. **Opening Devotion and Welcome**
Ballroom 1 & 2
 - **Alesia Frerichs**, President and CEO, Lutheran Services in America
 - **Pastor Mark Huber**, Sanctuary Church
 - **Renada Johnson**, Senior Director, Children Youth & Families, Lutheran Services in America
- 9:15 – 10:30 a.m. **Leveraging the Mega Trends and Future Forces Headed Our Way**
Ballroom 1 & 2

Is your organization positioned to place strategic bets in the face of uncertainty? Are you prepared to leverage the mega trends and future forces headed our way? In an era marked by rapid change and unpredictable shifts, strategy—rooted in stability and predictability—can be inadequate. Join Matt Ranen as he shares how speculative forecasting, adaptive responsiveness, sustainable portfolio management and other approaches can help leaders gain actionable insights into navigating today's fast-moving business landscape.

- **Matt Ranen**, Principal, Matt Ranen Consulting; Program Director for the Strategy Executives Council at The Conference Board; Lecturer, Northwestern Kellogg School of Business

Leadership Profile: Making Tough Decisions

- **Nate Schema**, President & CEO, Evangelical Lutheran Good Samaritan Society
- **Héctor Colón**, President & CEO, Lutheran Social Services of Wisconsin and Upper Michigan
- **Matt Ranen**

10:30 – 11:00 a.m.

Break

Conference Center Lobby

11:00 – 11:45 a.m.

Matt Ranen

Ballroom 1 & 2

11:45 a.m. – 12:30 p.m.

Futuristic Partnerships: A Strategic Journey for Long-Term Success

Ballroom 1 & 2

For some organizations, long-term success may be best achieved through leveraging innovative partnerships. This session will highlight the strategic considerations, challenges, and lessons learned in selecting the right partner to strengthen the organization for long-term growth and impact. Join Adriene Iverson, Rick Marshall, and Ken Daniel as they share their vision on the values of partnership and the future of integrated health care.

Panelists:

- **Ken Daniel**, President and CEO, United Homes Church
- **Adriene Iverson**, President, Transforming Age+
- **Rick Marshall**, President and CEO, Genacross Lutheran Services

- **Samuel Sipes, President & CEO, Lutheran Services Florida** (moderator)

12:20 – 12:30 p.m.

Morning Wrap-up

12:30 – 1:30 p.m.

Networking Lunch

Stockton A & B

1:45 – 3:00 p.m.

Catalyst Roundtables

- **What Does It Look Like When Social Care and Health Care Collaborate to Strengthen Families?**
Lagoon Room
- **Public-Private Partnerships to Advance Housing Security**
Ballroom 1

3:00 – 3:15 p.m.

Break

Conference Room Lobby

3:15 – 4:15 p.m.

Medicaid and the Shifting Federal Health Policy Landscape

Ballroom Room 1 & 2

- **Mark McClellan, MD, PhD**, Director and Robert J. Margolis, M.D., Professor of Business, Medicine and Policy at the Margolis Institute for Health Policy at Duke University
- **Rodney Whitlock, PhD**, Vice President, McDermott+

4:15– 4:30 p.m.

Devotion and Wrap-up

Ballroom Room 1 & 2

- **Pastor Mark Huber**, Sanctuary Church

4:30– 5:00 p.m.

Walking Alongside, Together

Ballroom Patio

This small group discussion, led by Pastor Mark Huber and Renada Johnson, will focus on redefining organizational leadership for today as we work to balance decision making and understanding. Join

with your peers to share your insights, challenges, and strategies.

6:00 – 6:30 p.m.

First-Time Attendee Welcome Reception

West Lawn (Outdoor Lawn)

Lagoon Room (Inside, Weather Dependent)

Sponsored by [Portico Benefit Services](#) and [Mission Investment Fund](#).

6:30 – 7:00 p.m.

Open Reception for All

West Lawn (Outdoor Lawn)

Lagoon Room (In case of inclement weather)

Sponsored by [Portico Benefit Services](#) and [Mission Investment Fund](#).

7:00 – 9:00 p.m.

Group Dinner

Stockton A & B

Join us for dinner and conversation with your peers as we share time together and welcome CEOs new to the network.

Tuesday, January 28, 2025

7:30 – 8:30 a.m.

Breakfast

Conference Center Lobby

7:30 – 8:30 a.m.

Breakfast for the Disability Network CEOs

Tarpon Room

8:30 – 8:45 a.m.

Devotion

Ballroom 1 & 2

- **Pastor Mark Huber**, Sanctuary Church

8:45 – 10:30 a.m.

Crafting Future from Uncertainty: Scenario Planning in Dynamic Environments

Ballroom 1 & 2

Scenario planning is more than an analytical exercise—it's a *process* that provides leadership with valuable experiential inputs. Explore the power of the two-phase approach: divergent thinking and action and priority-setting. You'll leave with tangible actions and takeaways to share with your team and Board.

- **Matt Ranen**, Principal, Matt Ranen Consulting; Program Director for the Strategy Executives Council at The Conference Board; Lecturer, Northwestern Kellogg School of Business

10:30 – 11:00 a.m.

Break

Conference Center Lobby

11:00 – 11:55 a.m.

Sector in Motion

Ballroom 1 & 2

Crafting Future from Uncertainty (cont.): Wrap-up and Reflections

- **Matt Ranen**

Noon – 1:30 p.m.

Annual Membership Meeting & Leadership Awards Luncheon

Stockton A & B

Sponsored by [Lutheran Church Extension Fund](#).

1:45 – 3:00 p.m.

Catalyst Roundtables

- **The Forgotten Middle: How Are Policy Makers, Payers, and Providers Preparing for this Surge?**
Ballroom 1
- **Building a Future-Ready Workforce**
Lagoon Room

3:00 – 3:15 p.m.

Break

Conference Center Lobby

3:15 – 4:00 p.m.

Catalyzing Insights: Ron Hetrick, Lightcast

Ballroom 1 & 2

In the next 10 years, the U.S. will face the largest labor shortage it has ever seen, forcing health and human service agencies to pivot to fill their workforce. Leading workforce economist Ron Hetrick will describe how Baby Boomer retirements, plummeting childbirth rates, and historically low labor force participation will result in a deficit of 6 million workers by 2032.

- **Ron Hetrick**, Senior Labor Economist and VP of Staffing Product, Lightcast
- **Stephanie Chedid**, President and CEO, Luther Manor (moderator)

4:00 – 4:15 p.m.

Wrap-up and Devotion

- **Pastor Mark Huber**, Sanctuary Church

4:15 – 4:45 p.m.

Walking Alongside, Together

Patio

This small group discussion, led by Pastor Mark Huber and Renada Johnson, will focus on redefining organizational leadership for today as we work to balance decision making and understanding. Join with your peers to share your insights, challenges, and strategies.

4:15 – 5:15 p.m.

Public Policy Committee Meeting (by invitation only)

Tarpon Room

4:30 – 5:00 p.m.

One-on-One Walks

New and experienced CEOs are matched together to discuss issues, share ideas and foster relationships.

5:00 – 6:30 p.m.

Portico Networking Reception

Portico Benefit Services invites you to enjoy refreshments and conversation with friends and colleagues.

6:30 p.m.

7:00 pm.

Optional Networking Dinner

Golf Club Dining Room

Meet for a casual dinner and a chance to connect with friends old and new (participants cover their own meal costs). There will be two seatings: one at 6:30 and one at 7:00 pm. Please check your email for confirmation information. We will meet in the lobby at 6:15 pm (for 6:30 reservation) and at 6:45 pm (for 7:00 pm reservation) to walk over as a group, or plan to meet us there.

Wednesday, January 29, 2025

7:30 – 8:30 a.m.

Breakfast

Conference Center Lobby

8:30 – 8:45 a.m.

Devotion

Ballroom 1 & 2

- **Pastor Mark Huber**, Sanctuary Church

8:45 – 10:00 a.m.

Artificial Intelligence: Old News, New News or No News . . . What Does It Mean and What Could It Mean?

Ballroom 1 & 2

You can't miss this session: three leading industry experts share the ways AI is changing our work and our expectations in big and small ways. From using predictive analytics to provide better patient care to streamlining operations to workforce efficiencies, AI can be transformative, but there are also consequences to consider. Join us in exploring the pitfalls and opportunities as this game-changing technology barrels forward, and how nonprofit sector leaders must work to establish responsible and equitable guardrails.

- **Caitlin Augustin**, Vice President of Products and Programs, DataKind
- **Nathan Chappell**, Senior Vice President of DonorSearch AI
- **Nabiha Syed**, Executive Director, Mozilla Foundation, Dedicated to Harnessing AI for Social Good
- **Adriene Iverson**, President, Elder Care Alliance

10:15 – 10:30 a.m.

Break

10:30 a.m. – 11:45 a.m.

Artificial Intelligence: Old News, New News or No News . . . What Does It Mean and What Could It Mean? Cont.

Closing Benediction

Noon – 1:30 p.m.

Closing Lunch

Stockton A/B

Join us for an informal lunch as the CEO Summit draws to a close with a discussion of participant-driven topics. Boxed lunches will be provided.

- **Alesia Frerichs**, President and CEO, Lutheran Services in America

1:30 – 3:30 p.m.

New Americans Cohort Meeting

Silver Sand Dollar Room