



PENNSYLVANIA
ECONOMIC
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ASSOCIATION

2021 FALL CONFERENCE

Speaker Bios & Session Overviews

2021 PEDAFALL CONFERENCE - SPEAKER BIOS

Jason C. Barnes, CPA, MBA, MST, Partner, Baker Tilly US, LLP

Jason, a tax partner and one of his firm's tax leaders, has over 16 years of professional experience in accounting and taxation. Jason is a dynamic professional with broad expertise in federal, state, local and international tax compliance and planning services.

In terms of specific experience, Jason:

- Serves clients, including public, large private and international companies
- Provides tax minimization planning ideas for multinational companies
- Works collaboratively with the firm's engagement teams, focusing on identifying and implementing tax savings opportunities and strategies for his clients
- Provides income tax accounting services to public, large private and international companies, specifically related to ASC 740 and related financial statement disclosures
- Represents companies involved in transactions, mergers and acquisitions, specifically as it pertains to tax planning and income tax accounting matters
- Is a licensed CPA in Pennsylvania

Jason's industry involvement includes the American Institute of Certified Public Accountants and the Pennsylvania Institute of Certified Public Accountants. His education includes a Master of Business Administration and Bachelor of Science from DeSales University, a Master of Science in Taxation from Villanova University School of Law and the National Tax Education Program at the University of Illinois at Urbana-Champaign.

Dr. Victoria L. Bastecki-Perez, President, Montgomery County Community College

Dr. Victoria L. Bastecki-Perez became the sixth President of Montgomery County Community College in May 2020. As the leader of the institution, Dr. Bastecki-Perez relies on her decades-long career in academia to guide every aspect of student life, faculty involvement, community engagement, administrative efforts, and academic excellence that take place at the College and in the surrounding communities every day.

For nearly 25 years, Dr. Bastecki-Perez has dedicated herself to serving Montgomery County Community College. Today, she is focused on further solidifying the College's status as a premier community college by elevating all aspects of the student experience, increasing access and retention initiatives, and providing students with the tools, guidance, and resources they need to thrive in pursuit of their academic goals. She has a clear strategic vision for how to lead the College, an uncanny ability to unify the campus community, and a keen eye for improving the financial stability and sustainability of the organization.

Dr. Bastecki-Perez is a first-generation college graduate in her family. This experience has taught her the transformative impact a quality education can have on an individual's life and has greatly influenced her academic and leadership journey. Dr. Bastecki-Perez has since committed herself to expand academic equity and inclusiveness in the name of providing others with a similar life-altering opportunity.

As president, she is focused on elevating student success and equity. In her prior roles as Vice President of Academic Affairs and Provost, she worked diligently to enhance the academic enterprise through the creation of a five-year strategic plan for academic program development and delivery, including associate degrees, industry credentials, and certificates of completion that meet student transfer and employability needs.

As Chief Academic Officer, she broadened the Faculty Diversity Fellows Program to increase the number of fellows and to incorporate librarian and advisor roles in an effort to make the College's faculty even more reflective of the school's diverse student body. In doing so, she enriched the community with the energy and creativity that comes with diverse perspectives. This work also led to the College's recognition as one of the Most Promising Places to Work in Community Colleges for five consecutive years, a distinction that salutes community colleges that cultivate diverse, inclusive and supportive workplaces and learning environments.

Under Dr. Bastecki-Perez's leadership, the College also has earned the prestigious Achieving the Dream's Leader College of Distinction designation for its collective efforts in improving student outcomes and narrowing equity gaps. As part of the Middle States Commission on Higher Education (MSCHE), a non-governmental membership organization to promote educational excellence, she proudly participates as an Accreditation Liaison Officer to uphold high standards across accredited colleges.

Her close work with the Montco Family spans nearly 25 years, having served in three other capacities at the College in the roles of Associate Vice President of Academic Affairs (2006-2010), Dean of Health and Physical Education (2000-2006), and Director and Professor of Dental Hygiene (1996-2003) at the College. Before joining Montgomery County Community College, she was an award-winning faculty member and Senior Clinical Supervisor at the University of Pittsburgh, School of Dental Medicine for nine years.

Dr. Bastecki-Perez's accomplishments extend far beyond the College's campuses as a pillar of the broader Montgomery County and Pennsylvania academic community. She values the partnerships forged within Montgomery County to address broader educational needs and support services for residents and student. Currently, she serves as a member of the Pennsylvania Commission for Community Colleges Council of Presidents, the T.E.A.C.H. Early Childhood@PENNSYLVANIA Advisory Committee, as well as the Pennsylvania Higher Education Assessment Leaders council. Additionally, Dr. Bastecki-Perez serves on the boards of directors of MontcoWorks (formerly Montgomery County Workforce Investment Board) and the Collegiate Consortium for Workforce & Economic Development.

As an accomplished scholar, Dr. Bastecki-Perez completed the entirety of her own education within the commonwealth. She holds a CDA (1985) and RDH (1986) from the University of Pittsburgh, Dental Assisting and Oral Hygiene, and a B.S. (1987) in Education from Edinboro University of Pennsylvania. She began her graduate coursework in 1988 at Exeter College, Oxford University through the Edinboro-Oxford Experience study abroad program, before going on to earn an Ed.D. (1995) and M.Ed. (1990) in Instructional Design and Technology from the University of Pittsburgh. She was recognized as a Distinguished Alumna by Edinboro University in 2000 and by the University of Pittsburgh in 2010. Her insights and studies have been cited and published in a wide-array of professional journals, and she has conducted countless presentations throughout her career to the academic and scholarly communities on local and national stage. This educational journey has uniquely influenced and positioned Dr. Bastecki-Perez for the leadership role she holds today guiding the students and faculty of the College to successful academic outcomes.

Dr. Bastecki-Perez considers herself a life-long Pennsylvanian, and has resided in Montgomery County for nearly 20 years with her husband and daughter. In her spare time, Dr. Bastecki-Perez enjoys spending time with her extended family, including her two stepdaughters, traveling, swimming, and dancing with her husband.

Dr. Silas Chamberlin, VP, Economic & Community Development, York County Economic Alliance

Silas Chamberlin, PhD, is vice president of economic development at the York County Economic Alliance, a position in which he serves as executive director of both the Redevelopment Authority of the County of York and the York Business Improvement District Authority and oversees a variety of economic financing, business attraction, and workforce development initiatives throughout York County. Silas's team is leading creation of the Bloom

Empowerment Center and Bloom CDFI to expand access to capital and technical assistance for minority- and women-owned businesses in York County.

Silas previously served as CEO of Downtown Inc, executive director of the Schuylkill River National Heritage Area, and in regional leadership roles with the PA Department of Conservation & Natural Resources and the Delaware & Lehigh National Heritage Corridor. Silas holds a PhD in environmental history from Lehigh University and a certificate in commercial real estate development from Cornell University. He is an adjunct professor of urban revitalization at York College. Silas is immediate past chair of the Pennsylvania Humanities Council board of directors, a board member of the Pennsylvania Downtown Center, and currently serves as a Governor's appointee to Pennsylvania's Conservation & Natural Resource Advisory Council.

David L. Cohen, Senior Advisor, Comcast Corporation

David L. Cohen - is Senior Advisor to the CEO at Comcast Corporation. Effective January 1, 2020, David has announced a transition from his leadership role as Senior Executive Vice President where he led a broad portfolio of responsibilities that he helped to create and oversee since his arrival at the Company, including corporate communications, legal affairs, government and regulatory affairs, public affairs, corporate administration, corporate real estate and security, and community impact. David also served as the company's first Chief Diversity Officer. Before coming to Comcast in July of 2002, Mr. Cohen served as a partner in and Chairman of Ballard Spahr Andrews & Ingersoll, LLP, one of the 100 largest law firms in the country.

A native of New York, Mr. Cohen graduated from Swarthmore College in 1977 with a BA and with a JD from the University of Pennsylvania Law School summa cum laude in 1981. From January 1992 to April 1997, Mr. Cohen served as Chief of Staff to the Honorable Edward G. Rendell, the Mayor of the City of Philadelphia. As detailed in the book *A Prayer for the City*, written by Pulitzer-Prize winning author Buzz Bissinger, Mr. Cohen played a critical coordinating role in significant budgetary and financial issues, in economic development activities, in collective bargaining negotiations, and in a wide variety of other policy and operational issues relating to the city.

David serves as Chairman of the Trustees of the University of Pennsylvania and its Executive Committee. He also serves as a member of the Trustee Board and the Executive Committee of Penn Medicine. In addition, David serves on both the Board of Directors and the Executive Committee of the Greater Philadelphia Chamber of Commerce, and is a member of the Chamber's CEO Council for Growth. He is also Chair of the Philadelphia Theatre Company, is a member of the United States Semiquincentennial Commission and a member of its Executive Committee, Honorary Chair of Campus Philly, a member of the Kimmel Center President's Leadership Council, and is Chair of the 2026 FIFA World Cup Philadelphia Bid Committee. David also serves as Chair of the national board of City Year and its Executive Committee and Co-Chair of its Governance Committee. He also serves on the national board of the National Urban League and is Chair of its Audit Committee, and is Chair of the Corporate Advisory Board of UnidosUS. David is a member of the Board of Directors of FS Global Credit Opportunities Fund and serves as Chair of its Nominating and Corporate Governance Committee. Additionally, David serves on the Board of Directors of the PNC Financial Services Group, Inc. and PNC Bank, National Association, and is a member of the Audit Committee, the Personnel and Compensation Committee, and the Special Committee on Equity and Inclusion.

Mr. Cohen has received numerous awards for his civic and charitable activities, including the Americanism Award of the Anti-Defamation League (1993), the American Red Cross Citizen of the Year Award (1999), the National Cable Television Association, Vanguard Award for Leadership and Impact in the Cable Industry (2005), the President's Volunteer Service Award (2007), the MS Society Hope Award (2007), the Drexel University Business Leader of the Year Award (2008), the National Urban League of Philadelphia Business Leader of the Year Award (2008), The William Way Community Center Amicus in Res Award (2009), the William Penn Award from the Greater Philadelphia Chamber of Commerce (2012), Spirit of Asian American Award (2012), the Jewish National

Fund Tree of Life Award (2012), the Minority Media Telecommunications Council Digital Equality Award (2013), and the Minority Corporate Counsel Lifetime Achievement Award (2017); the 4-H Brand Champion Award (2018), Kappa Alpha Psi's "Distinguished Citizens Award" (2019), the American Horizon Award from the Media Institute (2020), and the President's Award from the National Urban League (2020), and has consistently been named to Black Enterprise magazine's list of top corporate diversity executives. Mr. Cohen also was awarded an Honorary Doctor of Laws degree from Drexel University in 1997; an Honorary Doctor of Laws degree from Rider University in 2010; an Honorary Doctor of Laws degree from Rowan University in 2017, and Honorary Doctor of Laws Degree from Rohrer College of Business in 2019.

David lives in Philadelphia with his wife.

Fermin Diaz Fulgencio, Jr., Entrepreneurship Facilitator, Hazleton LaunchBox

As a young entrepreneur, father, husband and professional. Fermin has worked for different organizations to better the socio-economic welfare of the area. He has been very fortunate to be surrounded by a large number of people of different ages and all walks of life.

These are some of the initiatives that he has undertaken in favor of the development of the community where he lives and in which he is immersed:

- Fermin created the course "How to draft in CAD software", taught at Hazleton Integration Project, and he created the course "How to obtain the Engineer's License in the United States: Validation of foreign titles of Engineering or Surveying", Udemy.
- He served on the organization "Latins United for the Development of Hazleton", occupying the position of general secretary.
- Fermín was one of the ideologists of the "Hispanic Business Association".
- Along with other community members, he founded the "Society of Hispanic Professionals of the Hazleton Area", of which Fermin was the Vice President.

Currently, he serves on the following boards:

- Downtown Alliance for Progress, Advisory Council of Penn State University - Hazleton, Penn State Extension, Community Care Hospital and have served in many others.

Fermin has been working with a group of people concerned about this community, proposing things that tend to improve the quality of life and develop the region.

Fermin is the Main Street coordinator of the Downtown Hazleton Alliance for progress and the entrepreneur instructor at Penn State University.

EDUCATION & CREDENTIALS: Bachelor's degree in Civil Engineering, Technological Institute of Santo Domingo; Master's degree in Construction Management, Technological Institute of Santo Domingo.

Julie Fitzpatrick, Executive Director, Pennsylvania Downtown Center

Julie has been with PDC since 2005 and was appointed as the Ex. Director in July 2019. She has been involved with a variety of projects in communities all over the commonwealth, including community visioning, developing regional downtown revitalization strategies, establishing tourism infrastructure plans, and developing business improvement district plans and other strategic planning activities. She also provides board and committee education and technical assistance to designated DCED Keystone Communities Main Street and Elm Street programs, as well as to communities that are non-designated. She has recently completed projects with PA Department of Conservation and

Natural Resources (DCNR) on the concept of Nature-Based Placemaking, and with the PA Historical and Museum Commission (PHMC) as a response to the pandemic, called Designing for Distance.

She has a Master of Science degree in Community and Regional Planning, a Bachelor of Arts degree in Art History and Anthropology from Temple University and has completed coursework in their landscape architecture program. She attributes her focus on people-centered service and the importance of building relationships to 18 years of small business management at a locally owned independent downtown pharmacy. Her previous non-profit experience includes volunteering with Mulberry Arts Studio, WITF-public TV and radio, the Historic Preservation Trust of Lancaster County, and the Susquehanna Waldorf School. She served on the board of the Susquehanna Sustainable Business Network (SSBN) for more than six years and is currently on the board for the Pennsylvania Urban & Community Forestry Council, as well as a member of the Pennsylvania Pedestrian & Pedacycle Advisory Committee. She serves her local community by volunteering with the Marietta Restoration Associates. Julie resides in a 220 year-old home along the Susquehanna River in Lancaster County and enjoys the trail and small town charm of Marietta.

Scott L. Frankenfield, CPA, Senior Manager, Baker Tilly US, LLP

Scott is a senior manager in Baker Tilly's manufacturing and distribution group and has been with the firm since 2008. With 14 years of public accounting experience, Scott provides service to clients in a variety of industries. He brings a comprehensive knowledge of United States federal and state tax laws, as well as general accounting concepts specifically related to taxes.

In terms of specific experience, Scott:

- Serves clients, large and small, in a variety of industries including manufacturing, distribution and technology
- Provides service to high-net-worth individual clients for personal income tax matters, including family planning and other
- Provides income tax accounting services to large corporate clients, specifically related to ASC 740 and related financial statement disclosures
- Assists clients with various transaction-related matters, including income tax accounting related to acquisitions
- S corporation accounting and related tax consequences
- Is a licensed CPA in Pennsylvania

Jason's industry involvement includes the American Institute of Certified Public Accountants (AICPA). His education includes a Bachelor of Arts in accounting from Moravian College.

Nina Gabbidon, PMP, RACP Program Manager, Tetra Tech

Tetra Tech's RACP team provides services on behalf of the Commonwealth, which includes conducting reviews of Application and Business Plans and providing construction monitoring services, to ensure programmatic compliance with RACP guidelines and requirements.

As the RACP Program Manager, Nina is the primary point of contact with the Office of the Budget, providing oversight and management of staff members, reviewing project financing to ensure compliance with the grant agreement, and ensuring grantees meet statutory and administrative requirements.

Before Tetra Tech, Nina was the Senior Compliance Analyst for Milligan & Company's RACP team. Nina's involvement in noteworthy RACP projects includes Philadelphia Museum's Art Core, Philadelphia Fashion District, Downingtown River Station, and York Academy Regional Charter School. Ms. Gabbidon earned a B.A. in Political Science and English at Rutgers University and is a PMI certified project manager.

Sylvie Gallier Howard, Founder & CEO, Equitable Cities Consulting, LLC

Sylvie Gallier Howard is Founder & CEO of Equitable Cities Consulting, a practice focused on expanding the field and impact of inclusive, equitable economic development. Sylvie Gallier Howard has extensive experience leading organizations and diverse teams in the non-profit, private and public sectors. In her most recent tenure as Acting Commerce Director and as a cabinet member of Philadelphia's City government, she spearheaded strategic planning and implementation processes for the City in areas of inclusive growth, workforce development, equitable entrepreneurship and economic recovery. Prior to joining government, Sylvie spent her career in the non-profit sector and running her own small business, where she provided guidance to non-profits and social enterprises working in areas such as education, social justice, economic development and immigration. Sylvie has also served as the Executive Director of two community-based non-profits in Philadelphia: The Northwest Fund and The Empowerment Group. At the Empowerment Group, Sylvie started Philadelphia's first bilingual Spanish-English entrepreneurship training program. She has a B.A. in International relations from Barnard College of Columbia University and an M.A. in Sociology from Facultad Latinoamericana de Ciencias Sociales (FLACSO) in Ecuador - a graduate school started by the United Nations Development Program to promote development in Latin America. Sylvie is fluent in Spanish and French.

Eric Goldstein, Executive Director, King of Prussia District

Eric Goldstein is the founding Executive Director of the King of Prussia District (KOP-BID), a private, not-for-profit organization that works with 441 commercial property owners to keep King of Prussia economically viable and vibrant.

Eric has led highly successful efforts to reposition King of Prussia as one of America's great Edge Cities. Since 2011, Eric has modernized outdated zoning codes, launched a commuter shuttle service, managed design and installation of over \$4M in landscape improvements, directed aggressive marketing efforts to keep King of Prussia top-of-mind, and conducted numerous tax policy and planning studies.

Eric's efforts have contributed significantly to the \$3B economic development boom King of Prussia experienced since 2010 and, as a result, Eric was named to the Philadelphia Business Journal's 2017 Power 100 list, cited as a "Change Agent," and was named the 2016 Best Visionary by Philadelphia Magazine.

Eric is a licensed Landscape Architect (NJ/PA) and Professional Planner (NJ) and serves on the Board of Directors, and is Chair of the Annual Awards Committee, for the International Downtown Association (IDA) in Washington, D.C.

Kenetha Hansen, Director, Economic Development & Financing, York County Economic Alliance

Kenetha Hansen, EDFP, currently serves as Director, Economic Development & Financing, for the York County Economic Alliance (YCEA). Prior to the founding of YCEA in 2012 through an affiliation between York County's chamber and economic development organizations, Ms. Hansen had served with the latter since 1989. Ms. Hansen brings 32 years of economic development finance and incentive program experience including local, state and federal matching loans, tax-exempt financing, grant administration, tax abatement and credit programs. Ms. Hansen leads YCEA's business financing, attraction, and expansion activities.

Ms. Hansen earned her B.A. from Dickinson College and has been recognized – by the National Development Council – as a Certified Economic Development Finance Professional. She currently serves on the PEDAs Board and Conference Committee.

Scott Higgins, Director of Sales, Valley Forge Tourism & Convention Board

Scott Higgins is a hospitality professional of more than 10 years and has the pleasure of being the Director of Sales for the Valley Forge Tourism and Convention Board. A graduate of East Stroudsburg University, his career has led him through several hotels and allowed him to develop a strong understanding for the hospitality industry. In his current

role, he oversees meeting sales efforts and works as a trusted advisor to those looking for a new and unique destination for their meetings and events. In his 4+ years with the organization, Higgins has worked with over 250 groups that have decided to make Montgomery County the home for their event. In 2020, he was named to Connect Corporate's 40 under 40 and has held numerous volunteer roles with industry associations such as Meeting Professional International, Philadelphia Area Chapter. Scott lives in Montgomery County with his wife, son and dog.

Kerry Kirkland, Deputy Secretary, Diversity, Inclusion & Small Business Opportunities, Pennsylvania Department of General Services

Mr. Kirkland serves as the senior public official to represent and advise Governor Tom Wolf's Administration and the Department on all matters related to the development of statewide policies and programs to substantially increase the participation of small diverse businesses (SDBs) and small businesses (SBs) in Commonwealth contracting and in Pennsylvania's overall economy.

Under his leadership, the Department of General Services (DGS) commissioned the first Commonwealth Disparity Study, purchased a state-of the art contract compliance data collection and tracking system, and implemented the Commonwealth's Small and Small Diverse Business development program.

He formally served as Associate Deputy Administrator and Regional Administrator, US Small Business Administration; Vice President, US Black Chamber of Commerce and Executive Director, Pennsylvania Democratic Party. Mr. Kirkland is the Co-Founder of the American Contract Compliance Association, the largest membership-based contract compliance training organization in the world. He is the founder of the African American Political and Leadership Roundtable.

Mr. Kirkland served with a four-member delegation from the United States to South Africa. While there, he facilitated equity management training and provided technical advice to members of President Nelson Mandela's leadership team.

Mr. Kirkland is the recipient of numerous distinguished awards including; the W.E.B. Dubois Award for Excellence, the Parren J. Mitchell Award for Outstanding Minority Business Development Service, the Arthur A. Fletcher Vanguard Award and the Pennsylvania Legislative Black Caucus Civil Rights Award.

He holds a Master's Degree in Human Services (MHS) from Lincoln University. He is a member of Omega Psi Phi Fraternity; Inc. Mr. Kirkland is an Honorably Discharged United States Air Force (Viet Nam) Veteran.

Patrick M. Miller, Executive Vice President, Altoona Blair County Development Corporation

Pat currently serves as the Executive Vice President of the Altoona-Blair County Development Corporation. In that capacity, Pat oversees most of the Corporation's development projects including business park development, building leases, brownfield redevelopment projects, transportation related improvements and infrastructure projects. Pat is the coordinator of the state designated City of Altoona/Logan Township Enterprise Zone, manages the County's Keystone Opportunity Zone program and serves as the in-house grant administrator and coordinator.

Pat is also the Executive Director of the Greater Altoona Economic Development Corporation which oversees many of the projects currently impacting downtown Altoona revitalization efforts including coordinating ABCD Corp. investment opportunities with downtown businesses and property owners, managing the GAEDC façade rehabilitation loan and mini-grant program, coordinating events and activities impacting public space downtown. Pat also serves as the Executive Director and manages the City of Altoona's Parking Authority.

Pat graduated in 1974 from Penn State University with a BS in Community Development, is married to Susan and has a son Trent who is senior at Penn State University majoring in community and economic development and is in the Penn State Blue Band and Pride of the Lion's men's basketball pep band. In his spare time Pat enjoys PSU football

& basketball games, Altoona Curve and Pittsburgh Pirate baseball games, biking the area's trail network and tries to play a few rounds of golf.

Ram Mohan, Chief Operating Officer, Afiliis

Ram Mohan is the Chief Operating Officer of Afiliis, the second largest internet domain name company in the world, which he successfully sold to the private equity firm Ethos Capital in December 2020.

After immigrating from India at age 22, Ram worked at Unisys Corporation and First Data Corporation before joining Philadelphia's first Internet startup firm Infonautics Corporation in 1995, eventually becoming their CTO and helping them list on the Nasdaq stock exchange in 1996. Ram was a founder of the technology behind TurnTide, an anti-spam company acquired by Symantec (a provider of internet security) in July 2004. He served on the Board of ICANN, the global non-profit that oversees the Internet, from 2008 to 2018. He currently serves on the Board of the World Affairs Council of Philadelphia and several startup companies.

A cybersecurity expert, he co-founded the Security and Stability Advisory Committee for the Internet, which provides advice on major threats to Internet infrastructure. He is an inventor on seventeen U.S. patents for his work in Internet technology. Ram was the recipient of the Philadelphia Business Journal's '40 Under 40' award, InfoWorld's 'Top 100 Technology Leaders' award, and a CIO100 honoree.

He completed his BS in Electrical Engineering and his MBA in India before working on his MS at Drexel and post-graduate coursework at Harvard.

Bret Perkins, Senior VP, External & Government Affairs, Comcast Corporation

Bret Perkins serves as Senior Vice President of External and Government Affairs for Comcast Corporation. In this role he is responsible for local government affairs, strategic partnerships with state and local intergovernmental associations, and national policy advocacy organizations.

Bret joined Comcast in 2001 and has managed local government affairs while the Company grew from operating in 2,500 communities to 6,000 communities. His responsibilities have included implementing the company's regulatory and legislative initiatives at the local level, managing relationships with state and local intergovernmental associations, developing political strategy, and grassroots communications.

Prior to joining Comcast, he served as Vice President of System Services and Assistant to the President at Mercy Health System in Pennsylvania and worked in legislative affairs at Keystone Mercy/AmeriHealth Mercy Health Plan and with the North Philadelphia Health System.

In 2008, Bret received the National Cable & Telecommunications Association's Vanguard Award for Young Leadership, one of the cable industry's highest honors for its next generation of leaders.

Bret is a member of the Board of Spring Garden Lending. He is a Trustee of Temple University and serves on the board of Temple University Health System. He is past Chair and a member of the Board of The Committee of Seventy, and a member of the boards of Visit Philadelphia, PIDC, New Deal Leaders, and American Council of Young Political Leaders.

He received a Bachelor of Business Administration from Temple University and resides in Philadelphia with his wife and two children.

Holli Reidlinger, RACP Administrator, Pennsylvania Office of the Budget

Holli Reidlinger is a Grant Administrator for the Redevelopment Assistance Capital Program (RACP), where she provides assistance to grant applicants during the pre-award and post-award submission process. Her duties include

assisting projects with preparing and submitting e-Applications, Applications & Business Plans, access to the FTP site, and assisting with general project & program inquiries. Holli has been a Commonwealth of Pennsylvania employee for almost 19 years and has worked with the Redevelopment Assistance Capital Program (RACP) since 2005. Until 2 years ago, Holli managed the facilitation section of the RACP program. Which was helping projects get from the grant agreement stage to where they submit for reimbursement (filling out the forms). Holli attended Millersville University where she earned a bachelor's degree in business administration with concentrations in accounting and finance. Holli currently resides in the Harrisburg area with her 2 children, where they enjoy the outdoors, play on several sports teams, and watching a good movie.

Samuel V. Rhoads, Executive VP & Senior VP, Financial Services, PIDC

Sam is Executive Vice President and Senior Vice President of Financial Services for PIDC, Philadelphia's public-private economic development corporation, where he has worked since 1995. In this capacity, Sam manages PIDC's Financial Services Group, and provides support to PIDC's President and PIDC's Real Estate and Navy Yard Groups on strategic initiatives.

Financial Services: PIDC's finance group delivers innovative loans, tax-exempt financing, and grants to Philadelphia-based businesses and non-profits ranging from the very large to the very small throughout all neighborhoods of the City. PIDC's primary focus is lending to small businesses and offers working capital sources for small, minority, women and disabled-owned firms. In addition, high-impact financing projects include development of fresh-food anchored shopping centers, community health centers, and creation of employment and delivery of goods and services to low-income neighborhoods. The Financial Services Group is responsible for all aspects of the financing process including client engagement, credit, and portfolio management.

The Navy Yard: The Navy Yard is a 1,200-acre dynamic urban development, offering the Philadelphia region a unique and centrally-located waterfront business campus committed to smart energy innovation and sustainability. The Navy Yard is home to more than 15,000 employees and 175 companies in the office, industrial/manufacturing, and research and development sectors, occupying 7 million square feet of real estate in a mix of historic buildings and new high-performance and LEED® certified construction.

Real Estate Services: PIDC manages a full range of real estate activity, including sales and acquisitions, real estate development, infrastructure development and operations, property management, planning, project management and leasing. Since its inception, PIDC has managed the City's industrial land inventory, acquiring, improving and selling more than 3,100 acres of land in 18 industrial parks throughout the city. PIDC's Real Estate Group also manages transactions on behalf of the City, and master planning of the lower Schuylkill River.

Prior to joining PIDC, Sam worked at the New Jersey Economic Development Authority to provide low cost financing for development of public school and local municipal facilities throughout New Jersey, and at the Shared Housing Resource Center in Philadelphia where he supported community groups in the delivery of affordable shared housing alternatives to low-income elderly in Philadelphia.

Sam volunteers on several Boards and committees, including Germantown Friends School Committee, The Wyck House, and The Wistar Institute. Past affiliations include the Thomas Scattergood Behavioral Health Foundation, the Philadelphia Urban Finance Corporation, Awbury Arboretum and Philadelphia Yearly Meeting's personnel committee

Sam has a BA from Stanford University and a Masters in Public Affairs and Urban and Regional Planning from Princeton University's School of Public and International Affairs.

Rachel Riley, Senior Director of Communications, Valley Forge Tourism & Convention Board

Rachel Riley is an award-winning multimedia storyteller and former journalist with more than 16 years of experience from writing to in front of and behind the camera in both news and tourism industries. Working closely with the senior executive team, she oversees communications, presentations, public relations, social media, government and regional relations, arts and culture, sales partnerships, board business, and Monty the Fox mascot. Rachel holds dozens of “Town Talks,” or presentation conversations with dozens of municipalities in Montco, launched the “Tourism Talks” panel, and is working on two promotional events to support restaurants and arts and culture venues in 2021: Crave Montco Month in July, and Arts Montco Week in September. An excellent spokesperson for the organization, she also helped launch Bike Montco and other videos, led the charge for both the #MontCoStrong t-shirt and Freedom from Hunger community fundraisers, which raised \$25k and more than 20k pounds of food. To date, she has earned more than 4,000 article placements for 613 million in exposure for the org. A member of the Public Relations Society of America, the Mid-Atlantic Tourism Public Relations Alliance, and the Philadelphia Public Relations Association, Rachel was named to the Philadelphia Business Journal’s 2021 40 Under 40, and one of PR News’ Top Women in PR 2019. Born and raised in Northeast Philadelphia, she holds a bachelor’s degree in English Literature from Holy Family University. Rachel lives in Montgomery County with her husband, their two sons, a cat, and a dog.

Mark Rohlfing, Vice President Operations, Almac Clinical Services

Mark Rohlfing is Vice President Operations at Almac Clinical Services in Souderton, PA, leading day-to-day site operations in clinical supply chain management, project services, manufacturing, packaging, and global logistics. As a member of the executive team, he works closely with Almac's entire global service organization to ensure superlative collaboration and optimal process development and control to meet and exceed customer standards.

Mark was previously Director of Quality at Almac and has 25 years of professional experience within GMP/GCP Operations, QA/QC, and Regulatory Compliance including positions at Almac, Cell Pathways Inc., and Teva Pharmaceuticals USA.

He holds a Bachelor of Science degree in Biology from Millersville University of Pennsylvania and earned his Master of Science degree in Biology from Villanova University. He is an ASQ Certified Manager of Quality/Organizational Excellence, ASQ Certified Quality Auditor, and ASQ Certified Six Sigma Green Belt. He is also a Senior Member of the American Society for Quality and a member of the Parenteral Drug Association.

James Sanders, Board Member, Montgomery County Redevelopment Authority

James Sanders is a leader and business professional with over 20 years of experience in banking, finance, and economic development. Currently, he serves as a Senior Vice President of Commercial Lending for Univest Bank. Prior to Univest Bank, James was Vice President of Commercial Lending at Customers Bank with responsibilities to grow the brand into the greater Philadelphia market. He also worked for other financial institutions such as, Cape Bank, Wachovia (now Wells Fargo), and Vanguard.

In 2008, James expanded his expertise and knowledge base to work for a public-private-partnership between The Enterprise Center (TEC) and the U.S. Department of Commerce, Minority Business Development Agency (MBDA). He began his tenure as director of business development and finished a senior director reporting directly to the President of The Enterprise Center. James established working relationships/partnerships with supplier diversity experts and procurement executives, small and medium-sized businesses, federal, state, local government agencies, and private sector corporation.

Currently, James is serving on the boards of directors at the Montgomery County Redevelopment Authority, The Enterprise Center, Fox School of Business Alumni Association, and the Montgomery County Community College Foundation Board.

James and his family reside in Glenside, Pa. He is a native Philadelphian where he graduated from Olney High School. He completed his undergraduate studies at Virginia State University, receiving a B.S. Economics. James also earned an Executive MBA from Temple University, Fox School of Business. James and his wife are parents of two young adults, a daughter-in-law, a granddaughter, and a dog.

Gary W. Smith, President & CEO, Chester County Economic Development Council

Gary W. Smith currently serves the Chester County Economic Development Council as President and CEO. He joined the Council in 1976 and pioneered award-winning programs of below market-rate financing, agricultural economic development, brownfields redevelopment, conduit funding for commercial construction, industry partnerships, urban revitalization and multi-agency collaboration. During his tenure CCEDC and its Industrial Development Authority Partners have financed over \$3 billion in economic development projects, created/retained hundreds of thousands of jobs, trained tens of thousands of people, and helped countless businesses accomplish their growth goals.

Throughout his forty-five year career, Mr. Smith has held many titles on many national economic development boards and agricultural agencies such as President, Vice President, Founding Director and Legislative Chairman. He received the Lifetime Achievement Award from the Council of Development Finance Agencies where he also served as President. In addition, he has been honored with many awards 2021 Power 100 by the Philadelphia Business Journal, the Chester County Boy Scout Distinguished Citizen, the Joseph G. Filoromo, Jr. Community Service Award, Harold Martin Business Leadership Award, the Crystal Ball Award and TMACC's Chairman's Award to name a few.

Mr. Smith holds a MA in Public Administration from West Chester University as well as his undergraduate degree from West Chester University.

Mr. Smith is a Chester County native who grew up on his family's dairy and continues to raise Polled Hereford cattle. Gary and his wife Vicky have two adult sons and is the proud grandfather of two grandsons and a granddaughter.

Marshall W. Snively, President, Lancaster City Alliance

Marshall W. Snively is President of the Lancaster City Alliance (LCA). Created as of July 1, 2013, LCA represents the consolidation of two non-profit organizations; the James Street Improvement District and the Lancaster Alliance, both dedicated to community and economic development for the City of Lancaster, Pennsylvania. With a focus of empowering neighborhoods and setting the stage for increased investment, LCA was charged with the development of Building On Strength, the City's 15 year economic development strategic plan. Implementation of that plan remains LCA's largest body of work. LCA also manages Lancaster's Downtown Investment District.

At the inception of LCA, Marshall was named Executive Vice President & COO until assuming the role of President in 2016.

Marshall joined the James Street Improvement District (JSID) as Vice President in May of 2007 and in 2012 assumed the role of Interim President. His areas of focus included leading economic development initiatives; coordinated marketing programs; and implementing a business retention, expansion and recruitment strategy for Downtown and Northwest Lancaster City.

He moved to Lancaster City from Downtown Baltimore, Maryland, where he lived and worked for over 15 years. Marshall's career has always revolved around the strengthening of urban communities, from both the non-profit and for-profit perspectives.

Marshall was Vice President of Economic Development and Planning at Downtown Partnership of Baltimore, a non-profit business improvement district. In his 10 years at the Partnership, he spearheaded the development and implementation of strategic plans for both business and economic development initiatives. These included the design of streetscape and public space improvements; and the management of a Downtown retail feasibility study and recruitment program. In this role he also directed the Partnership's economic development department, which was responsible for membership recruitment, the annual State of Downtown Report and leading the Partnership's business retention and attraction efforts.

Before his move to Lancaster, Marshall served as Special Projects Director for Struever Bros. Eccles & Rouse; a real estate development company focusing on restoring and strengthening existing urban communities through the redevelopment of historic properties and in-fill new construction.

Marshall graduated with a bachelor's degree in Architecture from the University of Maryland, College Park in 1993. While in Baltimore he served on the Board of the Baltimore Architecture Foundation where he chaired the Kid's-In-Design Committee for 3 years and served on many Boards and committees including the Executive Committee of the Urban Land Institute's Baltimore Chapter. In Lancaster, Marshall has served on Lancaster City Planning Commission, as well as the Boards of the Lancaster Parking Authority, the YMCA and Lancaster Office of Promotion. Marshall is currently serving on the Boards of Lancaster Equity, SACA (Spanish American Civic Association) Development, and Community Basics, Inc. He also plays regional leadership roles as the ULI Philadelphia Central PA Satellite Council Co-Chair and International Council of Shopping Centers (ICSC) Pennsylvania Alliance Public Sector Chair.

Lauren Swartz, President & CEO, World Affairs Council of Philadelphia

Lauren is the CEO of World Affairs Council of Philadelphia, a 70 year old nonprofit that connects Philadelphia to the world through world class speaker programs, training professionals in global fluency, curating educational international travel and providing world affairs education to over 2,500 youth annually. Previously, she was Deputy Commerce Director of International Business & Global Strategy for the City of Philadelphia. With a focus on attracting business, talent, investment and visitors from around the world to Philadelphia, she crafted the global strategy for the city. Lauren has extensive background in international trade and currently serves as the Honorary Consul of Sweden for Pennsylvania. She is a Board Member for Leadership Philadelphia; Women Against Abuse; Philadelphia Convention and Visitors Bureau and Global Philadelphia Association. She is a member of the Sunday Breakfast Club and the Forum of Executive Women. Lauren is an accomplished speaker at conferences and events around the world. Awards include "40 Under 40" Honoree in 2019 from the Philadelphia Business Journal and Temple University's Fox School of Business International Business Partner of the Year in 2016-2017. She speaks some Danish and Spanish and has traveled for work and pleasure to over 25 countries.

Megan Tomlinson, Director of Events, Membership & Services, Valley Forge Tourism & Convention Board

An award-winning and industry-leading experience creator, Megan Tomlinson, Director of Events, Membership and Services has been with the Valley Forge Tourism and Convention Board (VFTB) for the past seven years. In her role, she oversees more than 500 members, encourages partnership with the VFTCB, and connects businesses to each other to work together. Megan also works with groups hosting events in Montgomery County to network with VFTCB members and other businesses that will help make their event a success. Last but not least, she also passionately

coordinates all events for the Tourism Board, including the annual Tourism Rally & Montco Golf Classic, and the Annual Luncheon, which has grown to more than 500 attendees in the past four years.

Prior to joining the VFTCB, Megan spent three years at the Pennsylvania Convention Center in Philadelphia, working alongside the Philadelphia Convention and Visitors Bureau, and selling all market segments for the building. She also worked for 15 years, in the Valley Forge Casino Resort, selling the Convention Center and meeting room space, and hotel rooms to all groups.

A Montgomery County resident, Megan holds a Certified In Exhibition Management designation. An avid traveler, and foodie, she also serves on the Montco WorkForce Board, and volunteers for Today is a Good Day.

Jeremy Waldrup, President & CEO, Pittsburgh Downtown Partnership

Joining the Partnership in May 2011 as President and CEO, Mr. Waldrup is responsible for working with the Board of Directors, stakeholders and staff to create and implement a vision that ensures Downtown Pittsburgh remains a vibrant and innovative place to live, work and play.

Prior to joining the PDP, Mr. Waldrup worked to support economic development initiatives with the City of New York serving as Assistant Commissioner of District Development for the Department of Small Business Services. In this role Jeremy was responsible for the oversight and capacity building of the City's 64 Business Improvement Districts and investing in commercial revitalization projects through an annual grant making program to local economic development organizations.

Mr. Waldrup also worked in business support and community development having worked for the South Bronx Overall Economic Development Corporation and at Charlotte Center City Partners. Jeremy also worked in the private sector as a consultant for the downtown master plans of Schenectady, NY and his hometown of Asheville, NC. Mr. Waldrup received a Master's in Public Administration from the University of Colorado and a B.A. in Economics from the University of North Carolina at Charlotte.

Nancy Walsh, Owner & Founding Member, tbdNOW

Nancy Walsh is the owner/founding member of tbdNOW, a professional development, coaching, and project development LLC in Lansdale, PA. Her work is grounded in a strong belief in the power of the unique strengths, stories, and vulnerabilities of every individual and organization. Guided by this passion, Nancy harnesses the essence of each client to facilitate the practical pursuit of potential. She brings this empathy- and strength-focused approach to the development of individuals, teams, organizations and ideas.

Since launching tbdNOW in 2020, Nancy has led the Montgomery Bar Association ("MBA")'s award-winning diversity initiatives, including the launch of a fully online Summer 1L Diversity program in response to COVID-19 restrictions and the ground-breaking "We Need to Talk" series. She developed and moderated a panel discussion on the Asian-American experience, featuring Nydia Han; served as an organizer and featured speaker for the Pennsylvania Bar Association's Minority Bar Committee's Diversity Summit; and is a frequent presenter, facilitator and trainer for Montgomery County's Department of Health and Human Services, the Phillip Jaisohn Memorial Foundation, and other local non-profits and private clients.

Prior to launching tbdNOW, Nancy was the Director of Engagement, Leadership and Community outreach at the Montgomery Bar Association, where she led leadership and professional development, membership engagement, diversity, community outreach, and access to justice initiatives. The MBA honored her impactful diversity work with the Champion of Diversity award, and the Pennsylvania Legal Action Network awarded her the prestigious PLAN award for her access to justice work throughout Montgomery County. Nancy also developed and continues to run the

MBA's award-winning Leadership Academy, a year-long personal and professional development program for emerging leaders in the legal profession.

Nancy spent a decade as an adjunct professor at Arcadia University, where she taught and helped develop courses for their honors Leadership program, as well as courses in writing and expression. She received her B.A. in English and Theater from the University of Notre Dame, her M.A. in English from Villanova University, and her secondary education certification through the graduate program at Holy Family University. Nancy is happily married to her husband The Honorable Joseph Walsh with whom she has raised three kind and beautiful daughters, Shannon, Bridget and Maggie.

Dave Zellers, Jr., Director of Commerce, Montgomery County

Dave is responsible for leading Montgomery County's wide-ranging economic & workforce development efforts. On a daily basis his responsibilities include building partnerships and cultivating a shared, inclusive, and proactive vision for economic & workforce development all while promoting Montgomery County as the place to live, work, learn, and invest. Dave's professional experience includes projects focused on community revitalization, non-profit vision & mission development, regional strategic planning, economic development financing & incentives, economic & workforce development integration, and entrepreneurship. In the past year, Dave has served as a co-chair for the Montgomery County 2020 Census Complete Count Committee, the county's Homes for All Project on housing affordability, and is on both the Leadership Council and Governance Committee of the Philadelphia Global Identity Project. His career has included positions with the Pennsylvania Downtown Center, the Pennsylvania Department of Community and Economic Development, the Northwest Pennsylvania Regional Development & Planning Commission, and the Miami University of Ohio Center for Public Management and Regional Affairs.

2021 PEDA FALL CONFERENCE - SESSION OVERVIEWS

Agenda is subject to change

Pre-Conference Session - Navigating Business Structures & Tax Returns: A Roadmap for Economic Development Lenders

As the statewide association of economic development professionals, PEDA strives to provide finance-focused training opportunities. Many economic development finance professionals have honed their lending skills while on the job and through various economic development finance training options.

Form 1120. Form 1165. Schedule C. Schedule K. What do all of these mean? This session will aim to alleviate the perplexing task of navigating and understanding federal tax returns. Presenters will provide economic development lenders with key tactics to understand various business structures and correlation to federal tax returns. Session elements include:

- Basics of and differences between common types of business structures
- Legal and tax considerations different business structures
- Tax return basics (Forms and Schedules) for different types of business structures

Keynote Presentation: Coming Up for Air

Small business owner and leadership expert, Nancy Walsh, reflects on the experiences of starting a new business in the midst of a pandemic and coaching individuals and teams through the fear, frenzy and opportunities of 2020. She discusses the importance of connection, the problem-solving magic of appreciative inquiry, and the “twin super-powers of leadership” (self-awareness and empathy). As she does in all her talks, Nancy invites participants to share their questions and perspectives throughout the session.

Transformation of a Region: Urban & Suburban Philadelphia in the 21st Century

From the changing city skyline and the reimagining of the iconic Navy Yard to the growth of 21st century economic sectors and a boom in suburban development along with the evolution of the region’s educational institutions, Greater Philadelphia has experienced a multitude of changes over the past two decades. Not resting on its laurels, the region is poised for exciting new development and to be the world leader in emerging sciences as well as one of the most attractive places to live and invest in the nation. This session explores how the region got here and what’s next for the city and four counties that make up nearly two-fifths of the Commonwealth’s economic output.

Demystifying RACP - 101

Many industry professionals are aware of the Redevelopment Assistance Capital Program (RACP), the Commonwealth grant program administered by the Office of the Budget for the acquisition and construction of, among others, economic development projects. With RACP representing an important tool that can be paired with PIDA and other funding sources to bring job-creating projects to fruition, PEDA believes economic development professionals across the state should be familiar with this program. Recognizing that not every organization’s economic development staff has the same level of experience with the program, PEDA has developed this session’s content to include an introduction to the basics of the program (i.e., summary, eligible uses of funds, key players, etc.), an overview of the application process (i.e., Capital Budget Itemization Act, eRACP, award, application and business plan, etc.) and compliance requirements and time for Q&A.

Hot Topic Session

In an effort to bring you the timeliest topics, this session has been left open to accommodate a hot topic. Once selected, information will be available on PEDDA's website.

Greater Philadelphia on the World Stage

With 95% of the world's population outside and over 85% of global economic growth outside of the USA, our state stands to benefit greatly from international engagement. Pennsylvania's ability to attract and leverage foreign capital, exceptional talent, bring job-creating businesses and host world class events is critical to maximizing economic growth and prosperity at home. This panel will present four private sector perspectives with Pennsylvania roots. Learn how international companies have grown here: Why and how did they choose PA? Does the local talent pool meet their needs? Hear from a local company that benefitted as a result of foreign capital. How did they access it, and what was the local impact of that international investment? Hear a first-person account of an immigrant who chose our region to build a career, family and company. What were the challenges and why did they stay here? Lastly, gain a better understanding of why hosting big, international events impacts our economy and community in real time and for the future.

Hot Topic Session

In an effort to bring you the most timely topics, this session has been left open to accommodate a hot topic. Once determined, information regarding the selected session will be available on PEDDA's website.

The Role of EDOs in Fostering Diversity, Equity & Inclusiveness

Being an active participant to bring about change in your community – how an economic development organization can work to create a more diverse, equitable and inclusive culture:

- Is your board reflective and representative of your community? Do you provide a platform for all community members? Does everyone have an opportunity to have a seat at the table?
- Do your MBE/person-of-color-owned businesses have access to fair and equitable working capital and contracts? Do you provide educational support and technical assistance around social entrepreneurship? Do you provide opportunities for networking or peer-to-peer support?
- Do you provide education, technical assistance, or funding to start-ups and/or support at other businesses' life stages?
- Are your neighborhoods equitable for all?
- Do you partner with other organizations to expand any of these services?

This session will offer suggestions to create a more lasting and meaningful impact in your community. Hear from leaders from various communities and organizations on how they are bringing about more equitable change in their own community.

The Role of Improvement Districts in Economic Development

Throughout the world, business improvement districts (BIDs), and related placemaking organizations, work each day to provide their stakeholders with coordinated strategies designed to drive economic development activity in their respective communities. This session showcases various successful strategies employed by BIDs from large urban centers to smaller Main Street villages.

Adventures in Economic Development Partnerships

Our work is not just defined by what we do, but how we collaborate together. Having the right partners makes all the difference. Over the past four years, from creating the County's first ever economic development marketing initiative to responding to the COVID-19 pandemic, the Montgomery County Commerce Department and the Valley Forge Tourism & Convention Board have developed a partnership that continues to take Montgomery County in new directions, and propel the county and its communities forward in exciting, never before imagined ways. For this final session of the conference, learn about and be inspired by this most unique of marriages.