



"What Can I Do?"

13th Annual
NONPROFIT GOVERNANCE SYMPOSIUM

**Governing well is one of
the most profound ways
to help our communities.**

*When you're down and out and your friends are gone
When the holidays are here and you're all alone
How can I help you?
If you're hungry and homeless and need a hand,
I can pick you up, I can understand
How can I help you?
No, it doesn't matter what time of year
Just call on me and I'll be here
It could be December or the Fourth of July
Don't worry about a thing, 'cause I'll be standing by
What can I do?
Tell me, what can I do?
To help you, my friend
All I'm asking, is what can I do?*

- The Blind Boys of Alabama,
William Bell, Chris Goldsmith

2017 SYMPOSIUM
SIGNATURE
SPONSOR



Join us January 12-14, 2017,
to find out how we can grow exceptional nonprofit and
philanthropic boards, engage our communities,
and use *"What Can I Do?"* to support our work.

LEAD SPONSORS



"What can I do?" is the latest in a long series of uplifting songs from the Grammy Award winning gospel group, The Blind Boys of Alabama and their producer Chris Goldsmith. It originally appeared on their 2014 album *"Talkin' Christmas"* (with Taj Mahal singing along). The song implores people to become more involved in helping a friend, a group or a community in any way they can.

Governing well is one of the most profound ways to help our communities.

And when it's exceptional, it has the biggest reach of all.

The Blind Boys of Alabama and their co-writers want to be part of a movement that catalyzes more people. To this end, they gift us this anthem to use in our work here and across the country.

USB SPONSOR



Thanks to David W. Jewell, Photographer



Kaleidoscope of Governance Tour

THURSDAY, JANUARY 12

Liz Shear, USD Nonprofit Symposium Director, facilitates the third annual Kaleidoscope Tour to learn from four Kaleidoscope Award winners and get a bird's eye view of what makes exceptional boards tick. This year, we visit Ocean Discovery Institute and Voices for Children in the morning and San Diego Youth Symphony and Conservancy and Kids Included Together in the afternoon.

Kaleidoscope for Exceptional Governance Award

The University of San Diego Nonprofit and Philanthropic Institute's Kaleidoscope for Exceptional Governance Award Committee recognizes and appreciates the fine work of past Kaleidoscope Award for Exceptional Governance winners.

Like a kaleidoscope, the work of nonprofit governance is intricate, varied, and involves viewing the organization through a variety of lenses. Exceptional governance requires precision, imagination, principled and adept decision-making. Its practitioners are dedicated volunteers who contribute valuable services to our community.

Casa de Amparo (2007)

Home of Guiding Hands (2007)

San Diego Jewish Community Foundation (2007)

Chicano Federation of San Diego, Inc. (2008)

San Diego Jewish Academy (2009)

Volunteers of America of Southwest California (2009)

United Through Reading (2010)

San Diego Youth Symphony and Conservatory (2011)

Girl Scouts San Diego (2012)

Francis Parker School (2013)

Ocean Discovery Institute (2014)

Voices for Children (2014)

Kids Included Together (2015)



FRIDAY SCHEDULE:

How can I help you?

8:30 am **Welcome: Dean Nicholas Ladany, School of Leadership and Education Sciences, USD**

A Special Honor to Pat Libby: Dean Ladany and Emily Young, PhD, Executive Director, Nonprofit and Philanthropic Institute, USD

8:40 am **“What Can I Do?” Chris Goldsmith, President Belly Up Entertainment and the Blind Boys of Alabama**

8:45 am **Presentation of the 2017 Kaleidoscope Award for Exceptional Governance and plenary session**
Janine Mason, MA, Executive Director, Fieldstone Foundation and Co-Chair, Nonprofit and Philanthropic Institute

10:15 am Break

10:25 am **Seminars and Workshops**

11:55 am Break

12:10 pm **Lunch**

1:10 pm **Introduction: Anna E. Diaz, CFP, Private Client Advisor, U.S. Trust**

1:15 pm **Keynote: Putting your Money Where Your Mission Is Jackie VanderBrug, Managing Director Investment Strategist, Global Wealth & Investment Management and U.S. Trust, Bank of America Private Wealth Management**

Is your organization's mission carried through to your operations and investment philosophy? Hear how investors and nonprofit organizations are increasing their assets via the "principle of shared value." Jackie VanderBrug will speak to how socially innovative investing strategies are changing the way nonprofits manage their financial assets and how such approaches can be accretive to the organization's mission, performance and fundraising.

2:40 pm Break

3:00 pm **Seminars and Workshops**

4:30 pm **Adjournment**



JANUARY 13, 2017

Maximize the Human Resources in Your Organization - The Board's Role

Marjory Kaplan, Consultant, Nonprofit Management and Governance and Traci Serrano, Director of Donor Services and Human Resources Manager, Jewish Community Foundation San Diego

Enlightened, effective boards ensure that the organization's staff is effectively managed, compensated and rewarded. In this session, Marjory Kaplan will share the many positive ways that the Jewish Community Foundation board supported her efforts to build a positive workplace culture where highly qualified, motivated and values-driven staff members contribute mightily to the organization.

ROOM I

What's Love Got to Do with it? Love and Leadership in the Third Sector

Zachary Green, PhD, Professor of Practice, USD Leadership Studies

We often shy away from using the word "love" to characterize the quality of our engagement with the communities we serve. Yet as one quotation from Martin Luther King suggests, "Without love, there is no reason to know anyone, for love will in the end connect us to our neighbors, our children and our hearts." Using this thinking as inspiration, this experiential and interactive workshop will consider different definitions of love. Participants will be invited to explore implications for integrating an orientation towards love into their nonprofit work. Particular attention will be given to inviting participants to create their own "love constellation" and consider the nature and meaning of placing love into greater professional practice.

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Speak Out: Enhancing the Board's Presentation Prowess

Deirdre Maloney, President, Momentum LLC

As a board strengthens itself from within, it must also prepare for another critical role: inspiring those on the outside. There are dozens of opportunities for board members to rally the community around their nonprofit by presenting to groups of all types and sizes. How can board members present meaningful, energizing information at any kind of gathering...without those speaking jitters? How can they even find those opportunities in the first place? And how can board and staff leaders help their boards get out there and spread the word most effectively? This session will cover it all.

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Find the Right People

Christy Wilson, Executive Director Rancho Santa Fe Foundation; Member USD Nonprofit and Philanthropic Institute Advisory Board

Board recruitment and selection is absolutely critical to a nonprofit's effectiveness and functionality, yet far too often the process is left up to chance. The right board member depends on your nonprofit board's style, governance model, characteristics, current needs, and place in the organizational life cycle. This seminar will help you create your ideal board by identifying and integrating each factor into a meaningful recruitment process.

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Build an Effective Governance Team

Paul Van Dolah, Van Dolah and Associates

Boards that are committed to achieving results know that it is not a simple process and it requires building trust and a willingness to engage in meaningful dialogue, commit to decisions, and hold each other accountable. In this seminar you will get practical ideas for how to work your board through these phases and get your board on course to achieving higher results on behalf of your organization.

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Put Your Bylaws to Good Use

Crystal Trull, MA, Principal, CT Consulting

When you hear the term "bylaws" do your eyes glaze over? Do you start to fret remembering the last time you tried to read your nonprofit's bylaws, but gave up after the first paragraph? Do you even know where your bylaws are? We de-mystify bylaws in an interactive and fun environment. At the end of the session you will better understand how this critical document can support an organization's mission, help board meetings operate more efficiently, and identify any potential pitfalls.

220A

Be Transparent: How to Report Financials to Different Audiences

Brian Yacker, JD, MBA, Founder and President, YH Advisors

We focus on best practices in presenting the financial statements (whether audited, reviewed, compiled, or just internal) and Form 990 for an exempt organization to various different "audiences" such as the organization's Finance Committee, the organization's Board of Directors, regulators (such as the Internal Revenue Service or California Attorney General) and the public (including prospective donors).

ROOM F



Optimize the CEO's and Board Leader's Role in Fundraising

Carole Fish, President, FISH+LEWIS Consulting, and Richard Tollefson, President and Founder, The Phoenix Philanthropy Group with Sharon Lawrence, President and CEO, Voices for Children; Martha Gilmer, CEO, San Diego Symphony; Steve Snyder, PhD, CEO, Reuben H. Fleet Science Center; Jack McGrory, Board Chair, Campanile Foundation, SDSU; Berit Durler, Board Member, San Diego Zoo Global; Maureen King, Board Member, Mingei International Museum; and Lynelle Lynch, Board Member, La Jolla Playhouse

ROOM H

What are the critical roles nonprofit CEOs and Board leaders play in optimizing an organization's fundraising? How do they impact key fundraising success factors such as governance and accountability, visioning and strategic planning, fundraising and accountability? How do they best encourage, empower, and partner with fundraising staff, engage in direct prospect and donor engagement, and lead by example through their own contributions? Join us for an interactive dialogue with some of San Diego's leading nonprofit CEOs and Board leaders.

Leverage Leadership Transitions

Kathryn R. Martin, Interim Leader, Transition Strategy Specialist, and Executive Coach

ROOM G

More than launching a search and making a hire, learn how to prepare for and leverage the time of transition. This is a time for increased board leadership, and it's essential to understand the predictable dynamics and risks of transition. Discuss ways to create unparalleled opportunities for momentum and stakeholder engagement by shifting the normal transition mindset of "keeping the day-to-day tasks going until the new Executive Director is in place," to boldly increasing revenue, organizational pride, community presence, confidence and excitement about your Next Chapter (which also generates candidate interest and eventual on-boarding)!

Annual Housekeeping and Compliance Concerns

Mike Lichtenberger, Managing Director, CBIZ MHM; Bob Gellman, Managing Director, CBIZ MHM; Heather Hernandez, Senior Manager, CBIZ MHM; and Jonathan A. Grissom, Partner, Henderson Caverly Pum & Charney LLP

ROOM E

Policies, bylaws and housekeeping matter. The Office of the Attorney General, the Department of State, and the IRS are putting more and more regulations that impact the nonprofit sector into effect. This panel of audit, tax and legal specialists will lead a very practical discussion, highlighting things your organization can - and should - be doing to prepare for and meet its annual housekeeping requirements.

FRIDAY SEMINARS AND WORKSHOPS *From 3:00 pm - 4:30 pm*

Stay on Track: Common Errors on Financials and How to Fix Them

Stacey Bergman, Shareholder, YH Advisors

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Financial statements are critical management and marketing tools in the not-for-profit sector. We will discuss the most common not-for-profit financial statement shortcomings. From the face of the financials to the disclosures and everything in between, join us as we identify the core issues noted within our sector with regards to financial reporting. Additionally, we will illustrate ways in which exempt organizations can easily identify and further mitigate the risk of misreporting.

Practice Governance as Leadership

Evan Holland, MA, and Paul Hudson, JD, Hudson and Holland Advisors, LLC

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Exceptional governance involves knowing the right questions to achieve excellent outcomes. We will help you identify what those questions are for your organization. You will deepen knowledge of governance by providing a 360-degree lens with which to view it, and gain new tools to address short and long-term strategies.

Embrace Diversity

Jena Olson, MA, Development Director, ARTS: A Reason to Survive and Anjanette Maraya-Ramey, MA, CNP, Senior Manager of Arts and Culture Funding Programs, The City of San Diego Commission for Arts and Culture

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The benefits of diversity to a nonprofit board are tremendous, and many nonprofits understand this. A simple Google search for "how to diversify a nonprofit board" has over 515,000 results. Yet, according to the 2012 Nonprofit Governance Index, the diversity of nonprofit boards hasn't changed much in the past 20 years. Why? Because diversifying your board is about much more than populating your team with a few different faces. It takes careful preparation, commitment, and strategic recruitment. You will walk away with an inclusivity assessment tool and with concrete steps to become more inclusive.

Incorporate Strategy: A Missing Component In Nonprofit Governance

Lyn Corbett, MA, President, The Pivotal Group Consultants Inc.

While nonprofit boards are responsible for strategy, there are no set guidelines as to how they should fulfill this role. We will explore ways in which boards, directors and their committees can think strategically and identify ways to incorporate strategy into the very fiber of their governance structure. We will also discuss an area that is at the heart of board effectiveness; strategic planning and the types of behaviors that either support or destroy good work.

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Build an Effective Governance Team

Paul Van Dolah, Van Dolah and Associates

Boards that are committed to achieving results know that it is not a simple process and that it requires building trust and a willingness to engage in meaningful dialogue, commit to decisions, and hold each other accountable. In this seminar, you will get practical ideas for how to move your board through these phases and get your board on course to achieving higher results on behalf of your organization.

220A

Reimagine Your Board to Unlock Radical Transformation: Lessons From the Field

Pat Libby, MA, Pat Libby Consulting; Geraldine Evans, MA, PHP, Board Member, Dreams for Change; Teresa Smith, PhD, CEO, Dreams for Change; Linde Hotchkiss, Board Chair, Junior Achievement of San Diego County; Marla Brayshay Black, President and CEO, Junior Achievement of San Diego County; and Javier Guerrero, Executive Director, San Diego Children's Discovery Museum

Do you ever feel as if your nonprofit staff is giving more to the board than the board is giving to the organization? If that's the case, come learn how to "reimagine your board"©. The process of reimagining your board starts with an examination of governance documents and ends with board leaders who are eagerly and actively engaged with your nonprofit. We will "get inside" the process for reimagining your board and share the stories of three successful efforts.

ROOM I

The Internet of Things – Smart Devices, Not So Smart Technology

Kevin Villanueva, Director and IT Infrastructure and Security Practice Leader, IT Auditing and Consulting Group

Today's news is full of cybersecurity issues. Weekly we hear horror stories about hacking, identity theft, and "secure passwords" compromised. While many high-profile breaches involve large corporations, all organizations are at risk, often with fewer resources to mitigate cybersecurity threats. Do you know how to minimize the risk of data security attacks? We will discuss how these breaches happen, how to protect yourself, and what to do if you are compromised. You will better understand the Internet of Things (IoT), its vulnerabilities, how IoT devices are changing how business is conducted, their benefits and their security weaknesses. You will know how to protect your information assets in spite of having IoT devices in your environment.

ROOM G

Volunteer Leadership: The Good, The Bad And The Ugly

Renee Herrell-Fitzgerald, MA, Fitz Nonprofit Consulting; Jay Hill, CEO, The Library Foundation; and guests

Let's face it: fundraising is both a stretch and a stress for most board members. And, often, it can bring out our worst or our best. Come learn how to engage volunteers in a leadership role to effectively fundraise, fulfill their role as a board member, engage their networks in support of your cause, and have a good time.

ROOM F

Do Your Homework: How to Use Research to Develop Excellent Programs

Laura Deitrick, PhD, Associate Director, Nonprofit and Philanthropic Institute and Nonprofit and Leadership Management Program

Boards are charged with ensuring their nonprofits provide quality programs and services, thus, good program design is imperative. However, effective programs aren't built out of thin air. Nor should programs be designed in heated quick-turn-around responses to interesting new grant opportunities. Instead, good program design should be an ongoing organizational practice that rests on a foundation of research. With this in mind, workshop participants will learn how to draw from different bodies of research such as personal experience, community needs assessments, demographics, and academic studies to design fundable programs with measurable outcomes and impact.

ROOM H

Protect Your Organization from Fraud

Andy Maffia, CPA, Partner and Bobby LaCour CPA, Senior Manager, AKT, LLP

Protecting and safeguarding assets of your organization is one of the primary fiduciary responsibilities of the board. Is your organization protected? Are you vulnerable to fraud? During this session we'll discuss real-world fraud cases to learn how simple controls can help prevent big problems.

ROOM E



SATURDAY SCHEDULE

“What Can’t Not Do?”

How we can help to improve our communities

8:30 am **Welcome: *Emily Young*, PhD, Executive Director, Nonprofit and Philanthropic Institute, University of San Diego**

8:40 am **Introduction: *Richard Tollefson*, President, Phoenix Philanthropy Group**

8:45 am **Keynote: *Paul Shoemaker*, author of *Can’t Not Do?* and founder, Social Venture Partners International**

Did you ever wonder what you just can’t not do to help change the world? *Can’t Not Do* discusses how to find like-minded people to support your cause.

9:45 am Break

9:55 am **Seminars and Workshops**

11:25 am Break

11:35 am **Seminars and Workshops**

1:05 pm Break

1:15 pm **Lunch**

2:15 pm Break

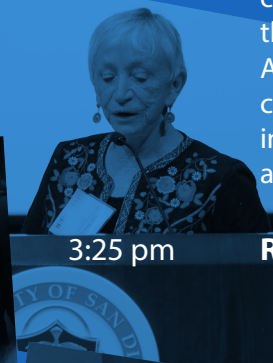
2:25 pm **Plenary: *Change the World, One Warrior at a Time***

***Hernan Luis y Prado*, Founder and Executive Director, Workshops for Warriors and White House Champion of Change Award winner**

How to combine great individual service with real social change is what our sector aspires to. Hernan Luis y Prado offers us inspirational and practical lessons about how to do it.

After 15 years of active military duty, Hernan returned to civilian life with a new mission: to return veterans successfully to civilian life with great manufacturing jobs and to help revitalize the dying U.S.A. manufacturing sector. The result is phenomenal. After 8 years and 16 major awards, all graduates are earning comfortable middle class wages and a preeminent pipeline into the manufacturing sector is in place. Our vets are flourishing and our manufacturing economy is growing!

3:25 pm **Reflections and Adjournalment**



SATURDAY

JANUARY 14, 2017

SATURDAY IN DEPTH WORKSHOPS *From 9:55 am - 1:05 pm*

Do it Right from the Get-Go: Three-hour workshops for new, small organizations or those who want a refresher course.

Board Development for Nonprofits (3 hours)

Alberto Cortes, MBA, Executive Director, Mama's Kitchen and Member, Nonprofit and Philanthropic Institute Advisory Board, USD

We will cover governance basics, but with a twist. We will discuss the unique opportunities and challenges all organizations face: how to recruit and maintain a capable and diverse board of directors, and how all organizations can use the "governance as leadership" framework immediately. Along the way, we will provide practical tools that encourage strategic and generative approaches in board meetings and use real life examples of how organizational challenges can produce growth, wisdom and deeper meaning.

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Fundraising for New/Small Organizations (3 hours)

Jacqueline Rossow, Jacqueline Rossow Consulting

For small or newly formed nonprofits, the difference between flourishing and floundering often depends on the ability to attract funding. In this hands-on workshop, you'll discover specific steps and best practices to establish consistent and productive fundraising efforts, without overwhelming your schedule and staff. Learn why and how to develop strong individual relationships - the key to attracting major philanthropic gifts - based on T.H.I.N.K. life-principles adapted for philanthropy. You will take away great examples successfully using these principles and tools to develop relationships that build recurring and growing sources of funding.

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Legal Compliance Considerations (3 hours)

Mary Tovella Dowling, Esq., Associate Attorney, For Purpose Law Group

Worried about getting in hot water with the IRS, Franchise Tax Board or Attorney General for failure to meet annual compliance requirements? Here, you will learn how to protect your precious tax exempt status, how to avoid using valuable resources on legal fees and how to reduce the overall legal risks and liabilities you commonly face. We will explore staff, volunteer and independent contractor employment issues, why you need internal policies and insurance coverage including common provisions that should be included in every contract, as well as, licensing and permitting requirements.

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SATURDAY WORKSHOPS AND SEMINARS *From 9:55 am - 11:25 am*

Ancillary Exemptions and Compliance Considerations

Nikki Semanchik, Esq., For Purpose Law

Many 501(c)(3) tax-exempt organizations are unaware of the additional tax implications their organization may face after obtaining exemption from income tax. For example, certain California nonprofits are able to obtain an exemption from payment of property tax through the welfare exemption. The welfare exemption process can be a trap for the unwary as many nonprofits that were able to obtain exemption under 501(c)(3) find they do not meet the strict requirements set forth by the Board of Equalization. This presentation will examine the welfare exemption requirements and application process, as well as discuss the levying of sales and use tax on nonprofit organizations in California.

220A

Faith in Action: Finding a Place Where Religion & Nonprofits Create Stronger Communities Together

The Reverend Meg Decker, Vice President, Interfaith Community Services Board of Directors; Greg Anglea, Executive Director, Interfaith Community Services; and Mary Ferro, Faith Liaison, Interfaith Community Services

Interfaith Community Services raises \$3.5M per year, and utilizes more than 1,800 individual and group volunteers to support their safety net services for North San Diego County. Almost all of these resources ultimately emanate from Interfaith's 364 diverse member faith communities, from Anglican to Zen Buddhist. Hear how we develop relationships with faith communities, mobilize their resources to support mission, and do our best to keep everyone happy in the process!

ROOM G

Leadership Development in Your Organizations, Causes and Movements Discussion

led by Megan Thomas, Senior Director of Collaborative Philanthropy, San Diego Grantmakers. Panelists include: Dwayne Crenshaw, RISE San Diego; Franco Garcia, Environmental Health Coalition; Trinh Le, Leadership Development Director, Center for Policy Initiatives; Michal Tyra, Founder, The Manifesto Project and Director of Client and Community Engagement, The Phoenix Philanthropy Group

An in-depth conversation about the leadership development landscape in San Diego and a comparison analysis with other cities including Phoenix, Arizona. There will also be a discussion on the various leadership pathways available to your staff and constituencies. Why is leadership development important? How can we be more intentional about leadership development in the work that we do and with the communities that we work in?

ROOM F



What Every Board Member Needs to Know About Community Collaboration

Don Stump, MA, Executive Director, North County Lifeline

ROOM I

Over the last 25 years, collaboration has become a buzz word for the myriad of ways organizations work together to collectively advance their individual missions and do work that no one organization can do alone. But the work occurs mostly beneath the board's radar screen. Join one of San Diego's most experienced collaborative leaders as he shares the ins-and-outs of cross-organizational work and teaches you everything you need to know to foster and monitor this work.

Social Enterprise: Silver Bullet or Can of Worms?

Crystal Trull, MA, Principal, CT Consulting

ROOM E

Social enterprise and social innovation are popular topics of discussion in today's marketplace. More and more, private businesses are promoting social issues as a means to positively contribute to our world and funders are encouraging nonprofit organizations to become more innovative. Yet, for decades, nonprofits have been the original social innovators providing goods and services in creative and meaningful ways. All nonprofit leaders need to know what social enterprise means for their organization as well as its risks, benefits and opportunities. Join us!

Use Your 990s to Inform and Educate Your Stakeholders

Patricia Jo Mayer, Director, Moss Adams, LLP and Jane Coleman, Manager, Moss Adams, LLP

ROOM H

Establishing and maintaining strong lines of communication with stakeholders are important for today's not-for-profit organizations. Stakeholders are individuals who have a vested interest in your organization. Educating your stakeholders about the organization and its structure, plans, funding, activities and outcomes using transparency on the 990 can help your organization convey messages and expand its reach. It also gives stakeholders the opportunity to contribute to the overall success and prosperity of the organization.

SATURDAY SEMINARS AND WORKSHOPS *From 11:35 am - 1:05 pm*

12 Practices Driving Philanthropy Today and Into the Future

Nancy Jamison, President and CEO, San Diego Grantmakers

ROOM H

Leading and governing a nonprofit is so much harder than most people realize. Achieving the greatest impact possible - whether you are donor or doer - requires a balance between passion and analysis, patience and urgency, innovation and measurement, relationships and strategy, and collaboration and activist leadership. Nancy Jamison has had a chance to observe philanthropy in action from the funder perspective during her tenure at San Diego Grantmakers. She will share some thoughts and stories about how current and future philanthropic trends, practices and opportunities can provide food for thought for nonprofit volunteer and professional leaders as they design the best ways to make a difference in our community.

Maximize Estate Gifts – Understanding Your Organization's Rights and Responsibilities

Linda P. Spuck, CTFA, Vice President/Trust Officer, Union Bank and Jenny Hill Bratt, Esq., DLA Piper

ROOM E

Congratulations! You're the beneficiary of a planned gift. Now what? Do you have the right to request information? How long should you expect to wait before the gift arrives? Learn more about your rights and responsibilities as a charitable beneficiary, including the right to decline a gift, demand more information, or challenge the actions of a Trustee in order to maximize the gift and honor your donor's legacy.

Changing Minds & Lives with Data

Anahid Brakke, Executive Director, San Diego Hunger Coalition

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If the title of this workshop seems far-fetched, this session is for you! Nonprofits have access to a lot of data, but very little time to put it to good use. Discover how to communicate your data, research, accomplishments and lessons learned in a way that gets positive attention and advances your mission. Come learn how to reach a broader audience and build support for your cause.

Leading the Way: The Difference Between Governance and Management

Elsa Romero, CPA, Partner, AKT, LLP

ROOM F

Though the primary responsibility of the board is governance, members often find themselves dipping into a management role. This seminar clarifies essential governance functions, roles and structures, and provides tips on how to maximize the board's leadership role.

Next Generation Board Leaders on the Move: A Case Study of Karen Organization of San Diego

Ashley Rodriguez, MA, Chair, Young Nonprofit Professionals Network and Development Coordinator, Center on Policy Initiatives with Andrew Rae, MA, Chair, Karen Organization of San Diego and Teaching Artist, The Museum School; Carolyn Smyth, Board Secretary, KOSD and Executive Director, Impact Young Adults; and Nao Kabshima, Executive Director, KOSD

How can your organization gain new donors, new ideas, and committed board members? Engaging young professionals is a great way to diversify your board, inspire innovation and implement best practices. We will explore the huge value that young professionals can bring to board service and include best practices for recruitment and retention. We will feature a panel discussion of young professionals currently serving on nonprofit boards and organizational leaders that intentionally develop intergenerational board leadership.

ROOM G

Diversity, Equity and Inclusion and Green Access: Lofty Goal or Within Reach?

Emily Young, PhD, Executive Director, Nonprofit and Philanthropic Institute, USD; Marisa Aurora Quiroz, MA, Senior Program Officer, Environmental Conservation, International Community Foundation; Monte Jones, Executive Director and CEO, BAME CDC; Ben McCue, MA, Executive Director, Outdoor Outreach; and Myrian Solis Coronel, MA, National Partnership Manager, REI

Our region has become more diverse – in fact, we are now home to a majority-minority population. Likewise, income inequality is on the rise; but we know that regions are more resilient and economically vibrant when prosperity is more broadly shared among residents. With this in mind, many nonprofit boards are grappling with how to become more diverse and inclusive, and ensure greater access to economic opportunity and well-being. Yet many find it difficult to translate their goals into on-the-ground reality. Here, philanthropic and nonprofit leaders will share insights and lessons learned from their successful work with community-based efforts that increase green space in park-poor neighborhoods. The session is designed to engage you in meaningful dialogue and reflection and to learn how to use these tools to support your own work.

ROOM I

Who is on Your Finance Team? And Who Should Be?

Leonard Sonnenberg, CPA, Sonnenberg and Company; and Carol Stachwick, CPA, Carol Stachwick, A Professional Accountancy Corporation

As nonprofits go through their life-cycle, their fiscal governance needs change. The responsibilities grow and the job titles change. This is true for both finance staff and board members. Join us as we review the changing needs for your finance team from start up to major player. We'll start with a Fiscal Self-Assessment exercise to identify strengths and weaknesses. Then we'll evaluate the role of the key executive, your bookkeeper, accountant, controller, CFO, Treasurer, and various Board committees. In addition, we will review the relationship between finance staff, board members, and the independent CPA firm providing audit, review, or tax services. With a better understanding of the finance roles, it will be easier to know what you and your professional team can do to help your organization.

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How to Use "What Can I Do?" To Engage Your Community

Chris Goldsmith, President, Belly Up Entertainment and Grammy Award Winning Executive Producer; and Liz Shear, MA, USD Nonprofit Governance Symposium Director, USD NLMP faculty and consultant

"What Can I Do?" is the latest in a long series of uplifting songs from the Grammy Award winning gospel group, The Blind Boys of Alabama and their producer Chris Goldsmith. It originally appeared on their 2014 album "Talkin' Christmas" with Taj Mahal singing along. The song implores people to become more involved in helping a friend, a group or a community in any way they can. The Blind Boys and their co-writers want to be part of a movement that catalyzes more people to action. Join Chris and Liz to explore how you can use this song to gain more support for your cause.

214

Faith in Action: Finding a Place Where Religion & Nonprofits Create Stronger Communities Together

Greg Anglea, Executive Director, Interfaith Community Services

Interfaith Community Services raises \$3.5M per year, and utilizes more than 1,800 individual and group volunteers to support their safety net services for North San Diego County. Almost all of these resources ultimately emanate from Interfaith's 364 diverse member faith communities, from Anglican to Zen Buddhist. Hear how we develop relationships with faith communities, mobilize their resources to support mission, and do our best to keep everyone happy in the process!

220A



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