

University of San Diego's
Twelfth Annual Nonprofit Governance Symposium

Exceptional Governance Days

FRIDAY – SATURDAY, JANUARY 8 – 9, 2016
KALEIDOSCOPE OF GOVERNANCE TOUR – THURSDAY, JANUARY 7, 2016

JOAN B. KROC INSTITUTE FOR PEACE & JUSTICE, UNIVERSITY OF SAN DIEGO



Finance
Duty
Positive Culture
Trust
Advocacy

Partnership
Leadership

Loyalty
Strategic
Impact
Care

Teambuilding
Board of Your Dreams
Human Resources

High Performing Board
Collaboration

Governance as Leadership

USD Nonprofit Governance Symposium

Commons Generative

USB Sponsor



Mayer
Hoffman
McCann P.C.
An Independent CPA Firm

Friday Lunch



Signature Sponsors



Lead Sponsors



Supporting Sponsors



Friday Only



Thursday

January 7, 2016



8 a.m. – 12 p.m.

The Kaleidoscope of Governance Tour

Join Liz Shear, USD Governance Symposium Director, on The Kaleidoscope of Governance Tour. See governance as leadership at work, as we visit two extraordinary Kaleidoscope for Exceptional Governance Award winners, Voices for Children and Ocean Discovery Institute, for an in-depth conversation with their board and staff leadership.

Ocean Discovery Institute: Kurt Gering, Chair; Genette McGowan, Vice Chair; Chic Dohoney, Treasurer; Scott Pearson, Board Member; Shara Fisler, Executive Director

Voices for Children: David Bialis, Chair; Rochelle Bold, Esq., Past Chair; Dick Pfister, CAIA Board Member; Jill Skrezyna, Board Member; Haeyoung Kong Tang, Board Member; Sharon M. Lawrence, Esq., President/CEO

When we look for the Kaleidoscope for Exceptional Governance Award winners, we are looking for sound boards who take excellent care of their fiduciary assets and much more. Not only do they have a palpable sense of community and personal engagement, but they are willing and able to make sense of complicated situations and act from a broad perspective of what is best for the organization and the community. They are open, they learn from their mistakes and use the lessons to improve their work. When you meet with them, you can see and feel their pride, passion and teamwork.

Size, age and prestige are irrelevant; it is the quality of work that matters.

Exceptional governance is always a work in process. If you are proud of your board's track record at oversight, foresight and/or insight and have an exceptional governance story to tell, we encourage you to submit your organization for consideration.



- 8 a.m. Registration, breakfast, and networking
- 8:30 a.m. Welcome | **Dean Nick Ladany**, USD School of Leadership and Education Sciences
- 8:45 a.m. Symposium Orientation: **Laura Deitrick**, PhD, Director, USD Nonprofit Institute and **Liz Shear**, MA, Shear Directions, Director, USD Governance Symposium
- 8:55 a.m. **Exceptional Governance Days**
- 10:15 a.m. Break
- 10:25 – 11:55 a.m. Workshops: Choose from the following workshops.

FIRST FLOOR

Room E

Inside the 2015 Kaleidoscope For Exceptional Governance Award Winner Board: Kids Included Together (KIT)

Torrie Dunlap, Chief Executive Officer, Scott Tritt, Immediate Past President, Kelly Alhadeff-Black, 1st Vice President, Joseph Hoey, Secretary/Governance Chair, with Edith A. Glassey, MA, CFRE, Associate Executive Director, Center for Community Solutions and Janine Mason, MA, Executive Director, Fieldstone Foundation

Spend some time with the leadership of Kids Included Together and learn how they have created a dynamic board-staff partnership that has led to high-engagement, exponential growth and exceptional governance to support a thriving organization. They will share the tools and techniques they use to stay connected as busy professionals; the architecture, routines and culture that undergird their work and the lessons they have learned along the way.

Room F

Overhead Myths: Laura J. Roos, Business Assurance Partner, Moss Adams LLP and guests

Under-investing in administrative overhead often leads to poor performance by nonprofits. Unfortunately, many grantors/funders support organizations with lower overhead ratios and nonprofits contribute to the “overhead myth” by highlighting financial ratios as their core accomplishment. In this session we will discuss strategies to communicate with funders the costs of running your organization, how organizations have subsequently improved programmatic work after investing in administration, and how to evaluate grantees.

Room G

New Laws Affecting Nonprofits: Brian Yacker, JD/CPA, Founder and President, YHA Advisors

This presentation will provide valuable updates and summaries regarding new laws, rules, regulations and other guidance affecting all different types of exempt organizations. Additionally, current trends in the exempt organization sector will also be addressed, with a particular focus upon best practice and good governance of exempt organizations.

SECOND FLOOR

Room H

Maximizing Human Resources in Your Organization: The Board’s Role: Marjory Kaplan, CEO, San Diego Jewish Community Foundation

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 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 success of the organization.

Room 217

The Magic of Dialogue and Inquiry: Zachary Green, PhD, USD faculty and consultant

Dialogue and inquiry are conversational methods that enhance organizational effectiveness. Experience and learn conversational practices that promote effective governance. Learn how you can make the most of your practice by using the latest organizational tools.



Friday
 January 8, 2016

Friday

January 8, 2016



Room 220A

The Continuum of Strategic Alliances: *Paul Van Dolah, Van Dolah and Associates*

Strategic alliances can be the most logical move for organizations to make in these times of increasingly restricted resources and pressures to increase the overall impact and effectiveness within the broader community. Alliances are not without peril however. Before starting down the road to an alliance it is wise to be well informed of the keys to making them work. This workshop will help you better understand the forms that strategic alliances can take, the keys to success and lessons learned from the field.

Room 218

Financial Literacy: *Mike Lichtenberger, CBIZ, Andy Maffia, Senior Manager, AKT LLP, and Stacey Bergman, Shareholder, YHA Advisors*

The complexity of nonprofit financial management and reporting continues to deepen. Our panel will help you to know what financial information to ask for, as well as how to read and understand it. We will also explore what financial policies and practices you need to have in place and what legal responsibilities you have.

Room 219

Is Your Board Ready To Diversify? *Jena Olson, Community Promotions Manager, Mainly Mozart*

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 recruitment. You will walk away with an inclusivity assessment tool along with concrete steps to become more inclusive.

Room I

The Insider’s Guide to Succession Planning and Executive Search: *Pat Libby, MA, Pat Libby Consulting, Jane A. Rheinheimer, Esq., Principal, Rheinheimer, Smigliani, Drake APC and USD faculty, and Susie Sides, Trustee, San Diego Center for Children*

According to a recent survey conducted by the search firm, Nonprofit HR, two out of three nonprofits operate without a succession plan. This may be because many board and staff are confused about the key elements of a succession plan and how to advance the idea of establishing one without offending the current CEO. This workshop will lead you through a process for creating both an emergency and non-emergency succession plan and help you understand how to conduct an executive search process when the time comes.

12:10 – 1:00 p.m.

Lunch

1:00 p.m.

Break

1:10 – 2:40 p.m.

Plenary Session

KIPJ Theatre

Leadership Lessons from the Field: Join our master fundraisers, members of the San Diego Philanthropy Group, as they explore their journey thus far and how they see the culture of philanthropy evolving in San Diego. Panelists include:

- **Mary Ruth Carleton**, Vice President for University Relations, San Diego State University
- **Anne Farrell**, Chief Philanthropy Officer, Voices for Children
- **Doug Hanses**, Director of Development, La Jolla Playhouse
- **Steve Jennings**, Executive Director, Rady Children’s Hospital Foundation and Senior Vice President, Rady Children’s Hospital
- **Bill Littlejohn**, CEO and Senior Vice President, Sharp HealthCare Foundation
- **Tim O’Malley**, Vice President for University Relations, University of San Diego
- **Todd Schultz**, Vice President for Institutional Advancement, San Diego Symphony
- **Mark Stuart**, Foundation President, San Diego Zoo Global
- **Joe Watkins**, Vice President for External Relations, Point Loma Nazarene University

2:40 p.m.

Break

2:50 – 4:20 p.m.

Workshops: Choose from the following workshops.

FIRST FLOOR

Room E

Thinking and Acting Strategically Inside the Boardroom: *Paul Van Dolah, Van Dolah and Associates*

Today's environment is too dynamic for boards not to engage in ongoing strategic thinking. Boards are increasingly seeing the need to find and develop unique opportunities to create value and truly understand the organization's value proposition to the community. In this seminar you will gain insights into how strategic thinking informs strategic planning, understand the keys to advancing strategic thinking in the boardroom, building leadership's strategic thinking skills, capacity, and breaking past the barriers to strategic thinking in the board room.

Room F

Financial Literacy: *Mike Lichtenberger, CBIZ, Andy Maffia, Senior Manager, AKT LLP, and Stacey Bergman, Shareholder, YHA Advisors*

The complexity of nonprofit financial management and reporting continues to deepen. Our panel will help you to know what financial information to ask for, and how to read and understand it. We will also explore what financial polices and practices you need to have in place and what legal responsibilities you have.

Room G

New Laws Affecting Nonprofits: *Brian Yacker, JD/CPA, Founder and President, YHA Advisors*

This presentation will provide valuable updates and summaries regarding new laws, rules, regulations and other guidance affecting all different types of exempt organizations. Additionally, current trends in the exempt organization sector will also be addressed, with a particular focus upon best practice and good governance of exempt organizations.

SECOND FLOOR

Room 220A

Exceptional Partnerships: How the Board Chair and CEO Manage and Staff a Board: *Kathy Purdon, Board President, Francis Parker School and Kevin Yaley, MA, MEd, Head, Francis Parker School*

"Constructive Partnership" is one of the BoardSource "12 Principles that Power Exceptional Boards." What defines such a partnership, how do you develop such a relationship and how do you make it work day to day? Join two exceptional partners for a wide-ranging conversation that will give you a blueprint for success.

Room 217

When Groupthink Happens: How Boards Can Manage Agreement and Make Good Decisions: *Laura Deitrick, PhD, Director, USD Nonprofit Institute and USD faculty*

The board dynamic can be a tricky one that sometimes includes conflict and tension. To keep the peace, board members can find themselves engaging in groupthink, avoiding uncomfortable dialogue, or signing off on decisions that are not best for the organization. The board role is too important to let this happen. Using Jerry Harvey's simulation, "The Abilene Paradox," this seminar addresses the dangers of groupthink and provides strategies on how to avoid and overcome them.



Friday
January 8, 2016

Friday

January 8, 2016



Room H

The Insider's Guide to Succession Planning and Executive Search: *Pat Libby, MA, Pat Libby Consulting, Jane A. Rheinheimer, Esq., Principal, Rheinheimer, Smigliani, Drake APC and USD faculty, and Susie Sides, Trustee, San Diego Center for Children*

According to a recent survey conducted by the search firm, Nonprofit HR, two out of three nonprofits operate without a succession plan. This may be because many board and staff are confused about the key elements of a succession plan and how to advance the idea of establishing one without offending the current CEO. This workshop will lead you through a process for creating both an emergency and non-emergency succession plan and help you understand how to conduct an executive search process when the time comes.

Room I

The Super-Important Board Role: How to be an Excellent Organizational Ambassador: *Deidre Maloney, President, Momentum LLC*

As a passionate, committed leader, you get it. You know why your organization matters, and you intimately understand why it needs support to do even greater things. That's why you're one of the most important ambassadors that there is. How can boards use the unique and extraordinary work of their nonprofit to fulfill the role of excellent ambassador and find new levels of support — all while feeling energetic and at ease themselves? How can staff support their board members in doing this effectively? This session will cover it all.

Room 218

The Kaleidoscope of Governance: Exploring a New Governance Framework: *Liz Shear, MA, Shear Directions, Director, USD Nonprofit Governance Symposium and USD faculty*

Did you ever wonder how the Kaleidoscope of Governance got its name? Or why using the governance as leadership framework creates exceptional boards? Or even what this framework is all about? Join me as we demystify and explore the structure of governance, and what the combination of using three lenses (oversight, foresight and insight) does to produce exceptional governance.

Room 219

Preparing Your Board for Big Fundraising: *Renee C. Harrell-Fitzgerald, MA, CFRE, RCH Nonprofit Consulting*

Let's face it: most board members don't like asking for money. Who can blame them? It is an uncomfortable thing to do. With this in mind, this workshop will explore how you can effectively engage each of your board members in fundraising at their comfort level — from everyday fundraising to embarking on large-scale major gifts fundraising efforts like a capital campaign. Learn the key strategies to position your board for success with BIG fundraising.



8 a.m. Registration, breakfast, and networking

8:30 a.m. Welcome | **Tony Hsu** and **Janine Mason**, Nonprofit Institute Advisory Board Chairs

8:40 – 9:55 a.m. Keynote

Stand For Your Mission: The Power of Board Advocacy — You Are the Voice Your Mission Needs

Board Source, Champion Foundation and our very own San Diego Youth Symphony and Conservatory will explore how to unleash the full potential of nonprofits to advance their missions through advocacy.

- **Sonya Champion**, Co-Founder and Trustee, Champion Foundation
- **Vernetta Walker**, Vice President, Programs and Chief Governance Officer, BoardSource
- **Dalouge Smith**, President and CEO, San Diego Youth Symphony and Conservatory
- **Ernie Smith**, Vice Chair of Governance, San Diego Youth Symphony and Conservatory Board of Directors

9:55 a.m. Break

10:05 – 11:25 a.m. Workshops: Choose from the following workshops.

FIRST FLOOR

Room E

Building an Exceptional Board From the Start: Alberto Cortes, MBA, Executive Director, Mama’s Kitchen and USD Nonprofit Institute Advisory Board Member

Together, we will explore the characteristics that constitute an exceptional board, their responsibilities, such as fundraising and public relations, how to get and keep great board members, and what systems and processes you need to put in place to undergird their work. We will provide an open forum for your issues and for you to share your knowledge. THIS IS PART ONE OF A THREE-HOUR WORKSHOP FOR BEGINNERS ONLY.

Room F

Measuring and Communicating Outcomes and Impact: Mary Jo Schumann, PhD, Director, USD Caster Family Center for Nonprofit and Philanthropic Research, Kim Hunt, MA, Doctoral Research Assistant, USD Caster Family Center for Nonprofit and Philanthropic Research, Sean Mahoney, Executive Director, zero8hundred, and Becky Sanford, Lead Navigator, zero8hundred

How do we measure the effectiveness of our programs? How can we demonstrate to funders that our program is worthwhile? What’s working in our program and what’s not working? How can we make our program better? What’s the difference between formative, summative, process, and outcomes evaluation? What is a logic model? What is needed for a high-quality program evaluation? How can we afford to collect and analyze information about our programs? How can we effectively communicate program evaluation findings to various stakeholders? Now that we have program evaluation data, what do we do with it? How can we get our board focused on measurement and communications?

If you’ve ever asked any of these questions, join us as we walk you through the “non-sugar-coated nitty-gritty” of how process and outcome evaluation was built into zero8hundred, a San Diego-based program that proactively links transitioning military families to a broad range of resources and opportunities in the community and helps them successfully transition to civilian life. The panel will discuss successes and challenges of both process and outcomes measurement from the perspectives of nonprofit program provider, board member, program evaluator, and funder — each of whom has their own lens, perceptions, and reality.



Saturday
January 9, 2016

Saturday

January 9, 2016

Room G

What Every Board Member Should Know About Charitable and Planned Giving: *Linda Spuck, CTFA VP/Trust Officer, The Private Bank at Union Bank and Jenny Hill Bratt, Esq., DLA Piper*

Navigating the landscape of charitable and planned giving can be confusing and overwhelming for board members. The purpose of this presentation is to provide board members with an overview of techniques that will benefit their organization and benefit their organization's donors. This presentation will provide board members with issue spotting tools to introduce potential donors to mutually beneficial gifting strategies as well as guidance to board members of organizations already benefiting from charitable and planned giving techniques.

SECOND FLOOR

Room 220A

Audited Financial Statements vs. Form 990 — How and Why They are Different: *Laura J. Roos, Business Assurance Partner, Moss Adams LLP and Patricia Jo Meyer, Senior Tax Manager, Moss Adams LLP*

Do the audited financial statements and Form 990 tell a consistent story about your organization? Why don't your tax return and financial statements match? Join us for this session as we compare and contrast:

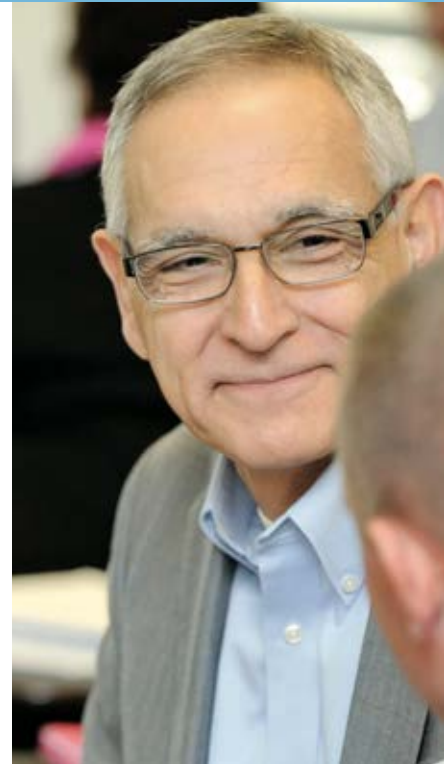
- Reporting of expenses, overhead, shared costs
- Treatment of income and change in net assets
- Agency and fiscal sponsorship
- Assets with variance power
- In-kind contributions
- Fundraising events

Room 217

Understanding Your Fiduciary Duties: *Ron Mitchell, CPA, Lead Audit Partner, AKT and Elsa Romero, CPA Partner, AKT LLP*

Serving on a nonprofit board means much more than just showing up for monthly or quarterly meetings. Directors of nonprofit boards have certain legal obligations and fiduciary responsibilities which involve understanding the duties of oversight over a nonprofit's assets, operations, and finances. Boards are required to make careful, good-faith decisions in the best interest of the organization consistent with its mission and independent of undue influence from any party or from financial interest. This seminar will not only help you understand the general obligations of serving on a board, but will help you be an effective board member by utilizing the highest and best use of your talents.





Room 218

Socially Responsible Investing: Jason Baron, MBA, Head Portfolio Manager for Social Investments, U.S. Trust

Is your organization's mission carried through to your operations and investment philosophy? Listen to a discussion on how investors and nonprofit organizations are investing their assets via the "principle of shared value". Jason Baron, head portfolio manager for social investments with U.S. Trust, 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.

Room 219

Engaging Your Community in Strategic Visioning: The Reverend Meg Decker, Trinity Episcopal Church, Escondido, Vice President, Interfaith Community Services Board of Directors and Greg Anglea, MA, Executive Director, Interfaith Community Services

Board and executive leadership from Interfaith Community Services will present how they created and implemented an inclusive goal-setting process to not only better understand the vision of their community, but to also better secure the support of that community toward those goals. Lessons learned are relevant for anyone considering or in the midst of strategic planning, as well as for organizations with diverse and multifaceted stakeholder groups, because the process Interfaith will present brought a unique approach to both engaging and hearing the voices from the many communities they serve and embody.

Room H

Mighty Marketing: Creating Strategies that (Really!) Make a Difference: Deidre Maloney, President, Momentum LLC

Frustrated with the whole nonprofit marketing scene? Does it feel like your time and effort is going to waste? Do you wonder what the whole point of marketing really is? Well you're about to find out! This energizing crash-course on all things marketing will help your organization find new marketing strategies that get goals met. We'll cover the nonprofit brand, how to identify and find your market, and how to write messages that get others to act. We'll also discuss how board members can effectively get involved in all of this. How's that for a good use of your time?

Room I

Stand for Your Mission: Sonya Campion, Co-Founder and Trustee, Campion Foundation, Vernetta Walker, Vice President, Programs and Chief Governance Officer, BoardSource, Dalouge Smith, President and CEO, San Diego Youth Symphony and Conservatory, Ernie Smith, Vice Chair of Governance, San Diego Youth Symphony and Conservatory Board of Directors

11:25 a.m.

Break

11:35 a.m. – 1:05 p.m.

Workshops: Choose from the following workshops.

FIRST FLOOR

Room E

Building an Exceptional Board From the Start: Alberto Cortes, MBA, Executive Director, Mama's Kitchen, and USD Nonprofit Institute Advisory Board Member

Together, we will explore the characteristics that constitute an exceptional board, their responsibilities, such as fundraising and public relations, how to get and keep great board members, and what systems and processes you need to put in place to undergird their work. We will provide an open forum for your issues and for you to share your knowledge. THIS IS PART TWO OF A THREE-HOUR WORKSHOP FOR BEGINNERS ONLY.

Saturday
January 9, 2016

Saturday

January 9, 2016



Room G

What Every Board Member Should Know About Charitable and Planned Giving: *Linda Spuck, CTFA VP/Trust Officer, The Private Bank and Jenny Hill Bratt, Esq., DLA Piper*

Navigating the landscape of charitable and planned giving can be confusing and overwhelming for board members. The purpose of this presentation is to provide board members with an overview of techniques that will benefit their organization and their organization's donors. This presentation will provide board members with issue spotting tools to introduce potential donors to mutually beneficial gifting strategies as well as guidance to board members of organizations already benefiting from charitable and planned giving techniques.

Room F

What Every Board Member Needs to Know about Community Collaboration: *Don Stump, Executive Director, North County Lifeline*

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.

SECOND FLOOR

Room H

Approaches to Donor Engagement for Campaigns: The Feasibility Study and More: *Carole A. Fish, MEd, CFRE, Principal, FISH+LEWIS Consulting, USD faculty and Richard Tollefson, President, The Phoenix Philanthropy Group*

You're getting ready for a campaign and the Board, CEO or Campaign Committee needs to decide whether to take the big step and conduct a feasibility study. Do you really need a study? Is it a waste of time or will a carefully planned feasibility study fast track your campaign? Is a traditional feasibility study what's really needed, or should you take a more expansive look to market research, a positioning study, and related data analytics and wealth screening? Are there other marketing tools that you can use to engage donors and learn what they think about your "pitch" before the campaign begins? Join in an exciting discussion about feasibility studies and other donor marketing tools that, when done well, can be worth their weight in gold.

Room I

Engaging Your Community in Strategic Visioning: *The Reverend Meg Decker, Trinity Episcopal Church, Escondido, Vice President, Interfaith Community Services Board of Directors, and Greg Anglea, MA, Executive Director, Interfaith Community Services*

Board and executive leadership from Interfaith Community Services will present how they created and implemented an inclusive goal-setting process to not only better understand the vision of their community, but to also better secure the support of that community toward those goals. Lessons learned are relevant for anyone considering or in the midst of strategic planning, as well as for organizations with diverse and multifaceted stakeholder groups, because the process Interfaith will present brought a unique approach to both engaging and hearing the voices from the many communities they serve and embody.

Room 220A

Understanding Your Fiduciary Duties: *Ron Mitchell, CPA, Lead Audit Partner, AKT and Elsa Romero, CPA, Partner, AKT LLP*

Serving on a nonprofit board means much more than just showing up for monthly or quarterly meetings. Directors of nonprofit boards have certain legal obligations and fiduciary responsibilities, which involve understanding the duties of oversight over a nonprofit's assets, operations, and finances. Boards are required to make careful, good-faith decisions in the best interest of the organization consistent with its mission and independent of undue influence from any party or from financial interest. This seminar will not only help you understand the general obligations of serving on a board, but will help you be an effective board member by utilizing the highest and best use of your talents.



Room 217

Building the Board of Your Dreams: A Comprehensive Approach to Board Development: *Liz Shear, MA, Shear Directions, Director of USD Governance Symposium and USD faculty*

How to get and keep good board members is a perennial problem for most nonprofits. Why? Most organizations don't realize that they need a clear and supportive board structure, an ongoing and systematic process for recruitment, a pipeline for identifying and trying out potential members, a method for continuous board education, engagement, retention and an appreciation processes.

In short, boards need a year-round board development system. Join me as we build the board of your dreams!

Room 218

Socially Responsible Investing: *Jason Baron, MBA, Head Portfolio Manager for Social Investments, U.S. Trust*

Is your organization's mission carried through to your operations and investment philosophy? Listen to a discussion on how investors and nonprofit organizations are investing their assets via the "principle of shared value". Jason Baron, head portfolio manager for social investments with U.S. Trust, 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.

Room 219

Always Look on the Bright Side of Life: Positive Culture for Board Performance and Retention: *Patti Saraniero, EdD, Moxie Research and USD faculty*

Presenter will share highlights from research and case studies that will provide tools and resources for building a positive culture in a board. Participants will also dialogue with others to further explore this topic.

1:15 – 2:10 p.m.

Lunch

2:20 – 3:20 p.m.

Plenary Session

KIPJ Theatre

The Next Chapter: Chapter Two of San Diego Opera's Journey in a New Age:

The Opera is back and growing stronger every day. Hear about how our Opera's transformation is progressing from their board president and other key board and staff. Learn what has worked and how you can use these lessons in your own organizations.

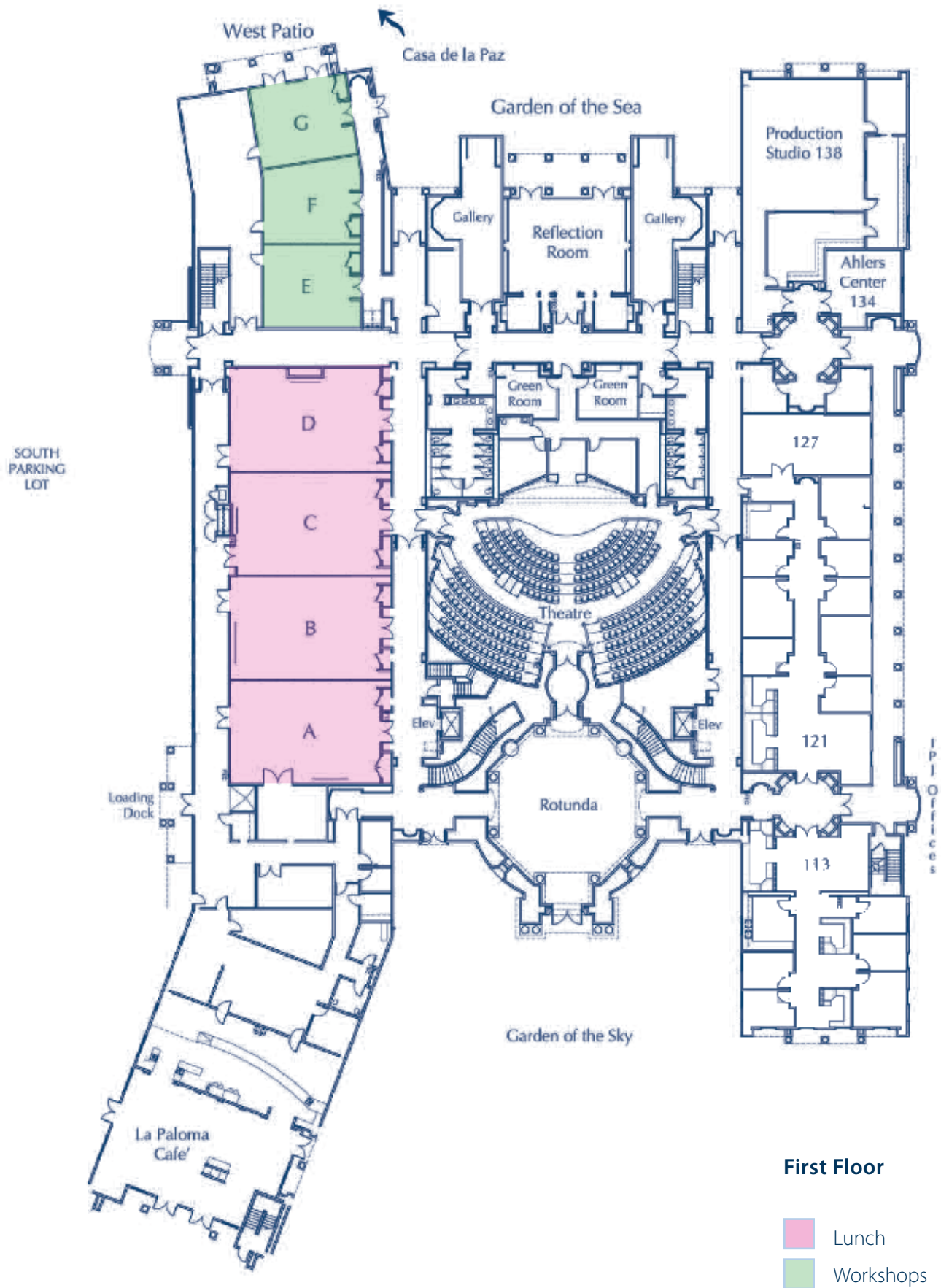
- *Carol Lazier, Board President*
- *David Bennett, General Director*
- *Linda Spuck, Chair, Development Committee and moderator*

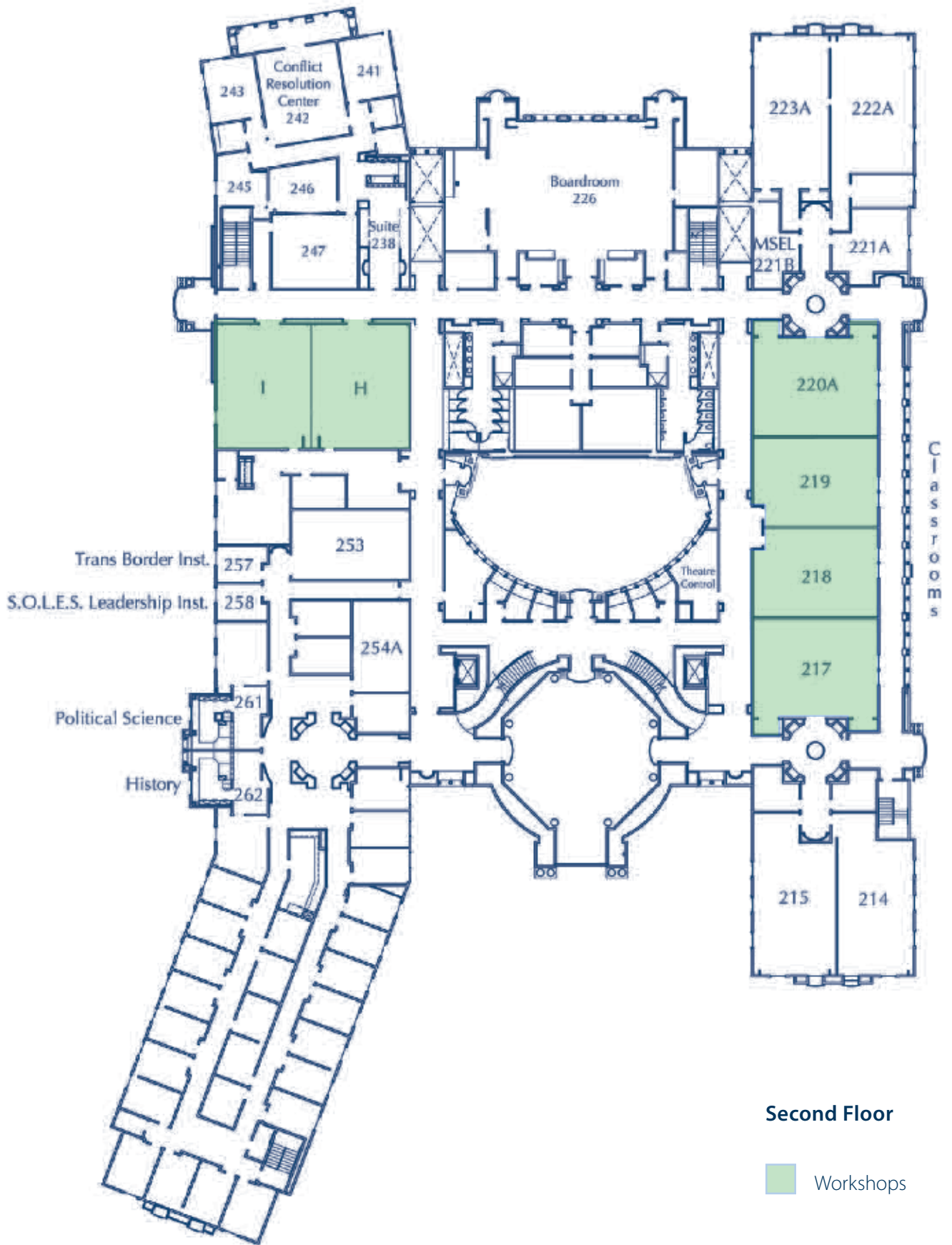
3:20 p.m.

Adjourn

Saturday
January 9, 2016

Map of Joan B Kroc Institute for Peace & Justice





Second Floor

Workshops

About the Institute for Nonprofit Education and Research

The Institute for Nonprofit Education and Research educates leaders and advances best practices in the nonprofit and philanthropic community through academic excellence, applied learning, and research that examines issues of strategic importance to the sector. The Institute for Nonprofit Education and Research is part of the University of San Diego's Department of Leadership Studies within the School of Education and Leadership Sciences.



MA in Nonprofit Leadership and Management

The Nonprofit Leadership and Management Program is designed for nonprofit and philanthropy professionals who are asking:

- How do I discover who I am as a leader?
- How can my nonprofit collaborate with others for greater impact?
- How do I measure and maximize success?
- How do I remain innovative?

The program is designed for individuals who want to be part of an intentional learning community of practitioners and scholars who are embedded in the field. It offers an integrated course of study that melds proven leadership theory with contemporary management models, strategies, and tools designed to teach professionals how to create and manage high-performance organizations.

The curriculum is focused on applied learning, which facilitates the transfer of knowledge from theory to practice. Each semester students produce organizational audits, governance documents, development plans, legislative campaigns, design research-based programs and evaluation models, and create community-organizing campaigns (among other products). In the process students learn how to be technically proficient and politically savvy in bringing best practices to nonprofit organizations and philanthropies. Many of these products are housed in a free online library of best practice resources.

Through:

- Scholarship. We educate the best to be the best
- Service. We provide hands on assistance to nonprofits and philanthropies
- Solutions. We drive innovation through consulting and research

PhD in Leadership Studies with a Specialization in Nonprofit/Philanthropic Leadership and Management

The specialization is intended for students with interest and experience in any of the three sectors (private, public, nonprofit), but with a special interest in Nonprofit and Philanthropic Studies. Its emphasis is on developing a student's ability to engage in what Aristotle referred to as practical reasoning (i.e., reasoning that focuses on making decisions about the best course of action to pursue in particular situations by attending to empirical evidence and value issues and the relationship between values and empirical understanding). The program also is interdisciplinary; it introduces students to theoretical constructs from a wide variety of social science and humanities disciplines and encourages students to use these constructs in the course of deciding what courses of action to take in policy making and practice.

The Caster Family Center for Nonprofit Philanthropic Research

The Caster Family Center is part of the Institute for Nonprofit Education and Research at the University of San Diego. The mission of the Caster Center is to provide research, evaluation, and consulting services that build the leadership and strategic- and evaluative-thinking capacity of local nonprofits as well as to be the leading source of information, data, and research on the local nonprofit sector. Among its services, the Caster Family Center:

- Offers access to and analysis of various types of nonprofit data
- Conducts studies and research on the sector
- Analyzes funding, public policy, and environmental trends affecting the nonprofit sector
- Provides program evaluation, needs assessments, and research services to nonprofit organizations on a fee-for-service basis
- Maintains databases on San Diego County's 9,000+ public charities as well as private and community foundations

Nonprofit Management Certificate

The eight-course Nonprofit Management Certificate will help you develop the management skills you need to successfully lead a nonprofit organization. Each course is designed to build critical and practical skills for nonprofit management. Students gain an understanding of the nonprofit sector and develop skills to advance their organization's mission, increase its effectiveness, and secure broader community support.

Experienced and new nonprofit sector employees, professionals transitioning to the nonprofit sector, a current or prospective board member, or potential or veteran volunteers will benefit from this research-based program of study.

UNIVERSITY OF SAN DIEGO

Kaleidoscope for Exceptional Governance Award

On its 10th anniversary, the University of San Diego Nonprofit 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)

Thank you

Thank you to our Participating Sponsor



Thank you to our Promotional Sponsors



Governance and leadership are inexorably linked. Governance is a legally constituted group of people who together advance, guide and oversee an organization on behalf of the community and for the common good. Leadership is the act of facilitating a group of people who together solve complex problems and create a common approach to the future. In the case of governance, the best leaders practice oversight, foresight and insight. They know their governance role, thus work in partnership with key staff. They are passionate, engaged and synergistic. They add great value to the cause.



UPCOMING EVENTS

SOLES Open House

January 23, 2016, 9:30 a.m. – 12:30 p.m.

University of San Diego
Mother Rosalie Hill Hall

Registration: solesadmissions@sandiego.edu

Join us for the SOLES Spring Open House to meet current students, alumni and faculty and learn more about our outstanding graduate programs, including the MA in Nonprofit Leadership and Management. This event will include an overview of the School of Leadership and Education Sciences, program-specific breakout sessions and a financial assistance overview session.



For more information, please visit: www.sandiego.edu/nonprofit