

University of San Diego's  
**Ninth Annual Nonprofit Governance Symposium**



CONFERENCE PROGRAM

# The Kaleidoscope of Governance Governance as Leadership

FRIDAY – SATURDAY, JANUARY 11 – 12, 2013  
JOAN B. KROC INSTITUTE FOR PEACE & JUSTICE, UNIVERSITY OF SAN DIEGO



### Keynote Speaker

SATURDAY - LARRY ENGLISH

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# GENERATIVE GOVERNANCE

AN IN-DEPTH LOOK AT "THE JUICE OF GOVERNANCE"

## Schedule for Friday, January 11, 2013

- 8:00 - 8:30 Registration, Breakfast, and Visiting
- 8:30 - 8:45 Welcome and Introductions  
Pat Libby, Clinical Professor and Director, Institute for Nonprofit Education and Research, University of San Diego
- 8:45 - 10:00 Presentation of Seventh Annual Kaleidoscope Award for Exceptional Governance™ and Panel Presentation  
  
Dr. Mary McDonald, Assistant Professor, University of San Diego and Chair of the Award Committee
- 10:15 - 11:30 Concurrent seminars
- 11:45 - 1:00 Lunch and Keynote Conversation  
*Connecting the Dots: Using a Fiduciary, Generative and Strategic Approach to Move San Diego's Philanthropy Forward*  
  
The latest USD Caster Center research studies on San Diego's nonprofit and philanthropic sector indicate increased public confidence, increased demand for services, and limited philanthropic resources. Join Caster Family Center for Nonprofit and Philanthropic Research Director, Dr. Laura Deitrick; Marjory Kaplan, President and CEO, Miriam and Jerome Katzin Presidential Chair, Jewish Community Foundation of San Diego; Marion Paul, Executive Director, San Diego Social Venture Partners; and Tom Karlo, General Manager, KPBS for some fresh analysis and ideas to address the problems facing our community. Together we will connect the dots and create something new.
- 1:15 - 2:45 Concurrent seminars
- 3:00 - 4:00 Mini-Lecture series
- 4:00 Reception honoring the Kaleidoscope Award winners

## Friday's Seminars

Each seminar is designed to be interactive and conversational. Seminars are 1.5 hours long and will be offered twice during the day. Seminars are limited to 25 participants. Each seminar has been created with a specific audience in mind. The following reference key has been designed to help participants determine which seminars they may wish to attend:

### Category

- I** Introductory information for a new or first-time board member
- E** Experienced board members are encouraged to attend
- A** All conference participants are encouraged to attend

### Lens

- G** Generative
- S** Strategic
- F** Fiduciary

### 1. What is Generative Governance: Cracking the Code & Making it Real® A/G

Generative Governance (GG) offers a powerful way to renew and grow, yet implementing it can be a challenge. How do you start? Where do you focus? What does it look and feel like when you've got it right? This seminar helps you crack the GG Code and offers tangible ways to implement it in your organization.

*Liz Shear, Consultant, USD Faculty and USD Nonprofit Governance Symposium Director and Eric Klein, Principal, Dharma Consulting*

### 2. Leading the Way: The Difference between Governance and Management A/G

Though the primary responsibility of a board is governance, members often find themselves slipping 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.

*Elsa Romero, CPA, Principal, AKT, LLP and Vice President of Finance and Revenue Enhancement San Diego State Alumni Association and Andrew Maffia, ACPA, Audit Manager, AKT, LLP and North Coast Hospice Board Member*

### 3. Creating Generative Board Cultures A/G

This seminar features words of wisdom from organizational leaders who have successfully created trust, confidence and deeper levels of board leadership. Share ideas about how to build respectful, highly productive board cultures and learn the steps to engage board and staff in promoting positive change.

*Marjory Kaplan, President and CEO, Miriam and Jerome Katzin Presidential Chair, Jewish Community Foundation of San Diego and John Ohanian, CEO, 211 San Diego*

### 4. Advancing Board Excellence: Broadening the Generative Experience E/G

Today's boards cannot be passive. They must extend beyond organizational oversight, engaging at deeper levels that help guide the organization through increasingly turbulent times. This seminar will provide new approaches for boards, how they can change their levels of engagement and move to a higher level of excellence.

*Paul Van Dolah, President, Van Dolah & Associates and USD faculty*

### 5. Governing Frameworks: Seeing Your Organization through Fiduciary, Strategic and Generative Lenses A/G

Good governance involves knowing the right questions to achieve excellent outcomes. This interactive seminar will not only deepen your knowledge of governance by providing a 360-degree lens with which to view it, and equip you to address short and long-term strategies.

*Janine Mason, Executive Director, Fieldstone Foundation and Program Officer Consultant, Weingart Foundation and Lina Park, Membership Director, Pacific Arts Movement (Pac-Arts)*

### 6. Governance Lessons from the Girl Scouts of San Diego-Imperial County Council, the 2012 Kaleidoscope Award Winner A/G

Learn how this venerable 100 year old organization has evolved its board to become a 25 member team capable of shepherding a spot-on response to the needs of local girls (32,000 this year alone)! Join us for a conversation about the elements of partnership, strategy, and principled decision-making.

*Jo Dee Jacob, Girls Scouts CEO; Katie Sullivan, Board Chair; Rick Brooks, Board Executive; Hollyce Phillips, Board Member; Deanna Martin Mackey, Board Development Chair; Dr. Mary McDonald, USD faculty and Chair USD Kaleidoscope Award Committee*

### 7. More Governance Lessons from the Field A/G

San Diego Youth Symphony and Conservatory and United Through Reading have developed outstanding governance practices; they are both past USD Kaleidoscope Award Winners; both were finalists for the national BoardSource 2012 Prudential Leadership Award for Exceptional Nonprofit Board Governance. Youth Symphony was awarded the grand prize. Learn about their continued success in governance.

*Robert Gaan, San Diego Youth Symphony and Conservancy Board President; Dalouge Smith, President/ CEO San Diego Youth Symphony and Conservancy; RADM Fran Holian USN (ret), Board Chair, United Through Reading; Sally Ann Zoll, CEO, United Through Reading; facilitated by Donald Stump, North County Lifeline and USD Kaleidoscope Award Committee member.*

### 8. Board NEXT: Bridging the Gap Between Emerging Leaders and Board Service A/G/S

We know that a diverse set of perspectives, including age, is critical to every board's success. This session will examine the perceived barriers to engaging emerging leaders in nonprofit board service and how to overcome them. Current leaders will leave knowing how to recruit young professionals and utilize them effectively. Emerging leaders will understand how to identify the right board service for them, and what local resources are available to support their efforts.

*Efrem Bycer, Vice President, Momentum, LLC*

### 9. From the Masters: Building a Competitive Advantage, One Board Member at a Time A/G

A successful nonprofit maximizes the skills, talents and connections of its board members to find mission success and meet the organization's financial bottom line year after year. Join some of San Diego's senior fundraising executives as they share best practices that help board members take their organizations to the next level.

*Mary Ruth Carleton, Vice President for University Relations and Development, SDSU and CEO of The Campanile Foundation; Todd R. Schultz, Director of Development, The Old Globe; Shelly Stuart, Vice President of Development, San Diego Humane Society; Mark Stuart, Chief Development and Membership*

Officer, San Diego Zoo Global and President, Foundation of the Zoological Society of San Diego; Bill Littlejohn, CEO Sharp HealthCare Foundation and Senior Vice President of Sharp HealthCare; Timothy O'Malley, PhD, Vice President for

University Relations, University of San Diego; Joe Watkins, Vice President of External Relations, Point Loma Nazarene University; Carole Fish, CFRE, Principal, Fish and Lewis Consulting and USD faculty

## Mini-Lecture Series

The mini-lecture series, delivered principally by USD faculty members, returns again this year. Each mini-lecture is suitable for all attendees and is only offered once. Choosing which lecture to attend is the hard part! We encourage teams to split up and share the knowledge gained with one another.

### 1. Advocacy as Strategy A/S

We look around our communities and see so many things we want to change. But how? What are the most effective strategies nonprofit leaders can use to make legislative change at the city, county or state level? This mini-lecture provides an easy-to-use 10-step framework that will make an advocate out of anyone.

*Pat Libby, Clinical Professor, Director, Institute for Nonprofit Education and Research, USD School of Leadership and Education Sciences*

### 2. Diversity—It's Not What You Think A/G/S

Diversity is important for organizational health, yet many of us can't explain why. Learn why diversity is essential to create thriving organizations and how to foster diversity in your nonprofit.

*Elizabeth Castillo, Associate Director, Institute for Nonprofit Education and Research, USD; Colleen Krause, Program Director, International Rescue Committee; Janedra Sykes, Organizational Consultant*

### 3. Legacy Building: Planting the Seeds to Build Your Endowment E/F

The Chronicle of Philanthropy informs us that the generational transfer of wealth to charities will require strategies that are different than traditional fundraising. Using insights gained from Harvard, Yale and Princeton's successful multi-billion dollar campaigns, we will explore what it takes to build a successful endowment.

*Ann Campbell, Executive Director of Marketing and Development, San Diego Opera*

### 4. The Power of Case: What Promise Are You Making with the Community? A/G

Learn how to explain why your cause is important enough to fund, what you want to accomplish, and what your commitment is to getting the work done. Join in a stimulating conversation about your commitment, your promise, your case and how to make it real.

*Carole Fish, CFRE, Principal, Fish and Lewis Consulting and USD faculty*

### 5. The Kaleidoscope of Governance G/S/F and A

The Kaleidoscope of Governance creates stronger, innovative, successful organizations. That's why it's the theme of our conference. Like a kaleidoscope, exceptional nonprofit governance unites and transforms bits of information into coherent patterns through a three-lensed structure (fiduciary, strategic and generative) that remains constant even when the viewer or the landscape changes. Delve deeper into this concept, and leave with a new metaphor and an extensive understanding of effective governance.

*Liz Shear, Consultant, USD faculty and USD Nonprofit Governance Symposium Director*

### 6. Servant Leadership in the Boardroom G/A

The Servant Leadership movement began in 1970. Started by AT&T's Robert Greenleaf, its core foundation includes fulfilling the public trust, focusing on what matters, finding the right questions to ask and defining service as work to the community. Join Rancho Santa Fe Community Foundation's board chair and executive director as they share their journey to exemplify these values and build an even stronger board.

*Neil C. Hokanson, Chairman, Rancho Santa Fe Community Foundation Board of Directors and Christina Wilson, Executive Director and USD faculty*

### 7. Building Financial Sustainability A/S

While many nonprofits focus solely on grants and individual donors for their financial viability, more and more are looking to earned income strategies as a third leg of support. While often lucrative and valuable, these strategies are not without risk. We will explore real earned income trials and tribulations experienced in the field. This is your opportunity to understand the concept of earned income strategies and how they may be applied in your organization.

*Paul Van Dolah, President, Van Dolah & Associates and USD faculty*

### 8. Better Marketing for a Better Bottom Line S/F and A

Why is marketing the first to go when nonprofits need to make cuts? Why can't organizations see the benefit of marketing to their bottom lines? Because they're doing it wrong! This session will provide a crash-course on all things marketing: from identifying which market to target, to how to find them, and what to say when you do. We will also explore how board members can and should get involved.

*Deirdre Maloney, President, Momentum, LLC*

### 9. The Power of Questions A/G

Questions can be a powerful tool for improving the quality of communication among groups. By attending this session you will learn how to use questions as a way to increase trust, enhance mutual understanding, and shift relationships with your fellow board members to the generative level.

*Zachary Green, USD faculty*

### 10. Nonprofits and Civil Society A/G

Join a panel discussion of USD doctoral students to learn how civil society relates to the nonprofit sector. Explore why civil society matters and what your board can do to help strengthen it.

*Dr. Mary McDonald, USD faculty, with panel of USD doctoral students from the School of Leadership and Education Sciences*

# STRATEGIC AND FIDUCIARY GOVERNANCE

THE FOUNDATION OF EVERY EXCELLENT NONPROFIT

## Schedule for Saturday, January 12, 2013

- 8:00 - 8:30 Registration, Breakfast, and Visiting
- 8:30 - 8:45 Welcome and Introductions  
Ruth Westreich, Co-Chair, USD's Institute for Nonprofit Education and Research Advisory Board and President, The Westreich Foundation
- 8:45 - 10:00 Nonprofit capacity building in plain English: town-gown at its best! Join Pat Libby, Director of USD's Nonprofit Institute; San Diego Chargers Outside Linebacker, Larry English — founder of the Larry English L.E.A.D. Foundation; Susan English, Larry's mother and CEO of the Foundation; Grace Chaidez, Assistant Director of the Foundation and Fernando Sanudo, Chief Executive Officer, Vista Community Clinic for a fascinating conversation and discussion about how to effectively use university resources to build the capacity of a nonprofit organization.
- 10:15 - 11:45 Concurrent seminars
- 12:00 - 1:00 Lunch with Connecting Conversations
- 1:15 - 2:45 Concurrent seminars

# Saturday's Seminars

Each seminar is designed to be interactive and conversational. Seminars are 1.5 hours long and will be offered twice during the day. Please note: The first two seminars listed are two-part 3-hour seminars, beginning in the morning and ending in the afternoon. Seminars are limited to 25 participants.

Each seminar has been created with a specific audience in mind. The following reference key has been designed to help participants determine which seminars they may wish to attend:

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## Fiduciary Governance

### 1. Governing Policies and You **A/F**

The board of directors is responsible for creating policy well beyond those that are legally required (Whistleblower and Document Retention and Destruction). Comprehensive governing policies free you up to attend to emerging issues, set clear expectations, prevent unnecessary conflict and keep boundaries clear. Find out how to establish and use these types of policies.

*Elaine Lewis, Executive Director for Developmental Services Continuum, Research Assistant, USD Caster Family Center for Nonprofit and Philanthropic Research, and USD faculty*

### 2. Evaluating Revenue Streams — The “Unrelated Business Income” Question **E/F**

This seminar addresses the importance of Board fiscal governance policies with an emphasis on evaluating revenue streams for possible unrelated business income (UBIT), which comes with its own set of rules that could impact the tax exempt status of your organization. Get the scoop on how to identify UBIT and how to manage it.

*Patricia Jo Mayer, Senior Manager, Tax, MOSS ADAMS, LLP*

### 3. Board Revitalization, Reengagement and Development: What Should Your Board Know? **A/F**

This seminar will address issues and answer questions about the revitalization, reengagement, and continuous growth demanded of board members. It will emphasize the significant issues facing board development and retention efforts, and provide tips to engage board members despite their limited resources and exposure to fiduciary liability.

*Mike Lichtenberger, Shareholder and Nonprofit Practice Leader at Mayer Hoffman McCann P.C.*

### 4. Beginner's Mind: Creating the Three-Lens Approach from the Very Start **F/G/S and I**

This seminar covers governance basics but with a twist. We will discuss the unique opportunities and challenges young organizations face, how to recruit and maintain a capable and diverse board of directors, and how a new organization can use the Governance as Leadership framework from its inception. Along the way we will provide practical tools that encourage generative and strategic discussion in board meetings and use real life examples of how organizational challenges can produce growth and deepen meaning.

*Alberto Cortes, Executive Director, Mama's Kitchen*

## Strategic Governance

### 5. 10 Steps to Social Media Governance: Where Community, Compliance, and Creativity Merge **A/S**

Social media is about community and creativity. For nonprofits, it is also about compliance. Numerous legal issues arise when nonprofits use social media to engage with clients, raise funds, and tell their story. Good governance is essential, but as a new field with limited best practices, extends beyond traditional management techniques. What's a board member to do? This seminar will present 10 simple steps you can follow to ensure that your social media governance is generative, strategic, and effective.

*Jennifer A. Jones, Research Assistant, USD Caster Family Center for Nonprofit and Philanthropic Research*

### 6. Stakeholders: Governance at the Boundary **A/S**

Every nonprofit has stakeholders: people who live in your neighborhood, people who use your services, people who fund you, and more. Learn about effective ways to identify your stakeholders, get to know them and engage them in your work. It is governance beyond the usual boundaries, both being true to your mission and gaining support. This session will explore how Casa Cornelia Law Center experienced this type of governance.

*Jessica Robinson, Executive Director, Consensus Organizing Center SDSU School of Social Work and USD faculty; Allison Bechill, Director of Development, Casa Cornelia Law Center*

### 7. Systems Thinking — Fulfilling Dreams through Meaningful Process **A/S**

John Maxwell writes, “Processes do matter — we overstate the event and underestimate the process.” Systems and strategic thinking are critical to organizational success. Their outcome is not the completion of an academic exercise, but greater resolve. Learn about the differences between systems and strategic thinking, and how to apply them to your organization for greater success.

*Ron Mitchell, CPA, Lead Audit Partner, AKT, LLP, President, Mira Costa College Foundation, and Board Member, San Diego Medical Society Foundation; Shannon Gonzalez, CPA, AKT, LLP*

### 8. The Great Paradox: The Board and its Fundraising Role **A/S**

It's one of the worst-kept secrets around, and yet it's very common. While most everyone agrees that the board needs to play some kind of role in supporting the bottom line, the harsh truth is that most board members don't enjoy fundraising or are even good at it. How do you use the passion of board members to raise money for the organization? How can staff and board members work together for better results and be more comfortable with fundraising discussions? This session will cover it all.

*Deirdre Maloney, President, Momentum, LLC*

### 9. Organizational Showcases **F/S/A**

USD's Nonprofit Leadership and Management Masters Program provides an opportunity for extensive student work in the community. Others can learn about exemplary projects when they are published for public use in our online Best Practices Library. Come hear about two such endeavors: the creation of an effective board manual for WiLD Coast, and the development of an audit handbook for San Diego Center for Children. You'll also learn how your organization can utilize the library to advance your cause.

*WiLD Coast project: Serge Dedina, PhD, WiLD Coast Executive Director; Kea Spurrier, San Diego Zoological Society and USD NLMP student; Justin Schaberg, San Diego Grantmakers Member Services Associate and USD NLMP student*

*San Diego Center for Children project: Diana Landis, CPA, San Diego Center for Children CFO and USD NLMP student; Lisa Andaleon, Project Manager Corporate Development, Life Technologies and USD NLMP student, Project Manager Corporate Development Life Technologies and student; and Liz Shear, facilitator*

## Faculty Biographies

**Lisa Andaleon** is a finance and business administration expert, specializing in the nonprofit sector. For twelve years she served as Manager of Technology Transfer at the Sanford-Burnham Medical Research Institute and was responsible for all of the accounting, financial planning and analysis, contract compliance, alliance management, commercial grants, and licensing for their business development office. Lisa served as Treasurer on the Board of Culture Shock Dance Troupe, and is currently on the San Diego Center for Children's Board Finance Committee. She is also actively involved in several volunteer committees at Self-Realization Fellowship Church. She is a second year student in USD's master's degree program in nonprofit leadership and management, and has a BA in math and economics from Claremont McKenna College.

**Allison Bechill, MA**, is the Director of Development at Casa Cornelia Law Center, a nonprofit law firm that provides free legal services to victims of human and civil rights violations. Prior to entering the nonprofit sector Allison worked locally in corporate philanthropy and as a magazine writer and editor in London and New York City. A graduate of the University of San Diego's Nonprofit Leadership and Management master's program, she also holds a bachelor's degree in comparative literature from Hamilton College for whom she serves as a representative for Southern California applicants. Allison previously served as a board member for the San Diego Council on Literacy and the Juvenile Court Book Club.

**Rick Brooks, MBA, CFA, CFP**, is Vice President of Blankinship & Foster, LLC. and board member of the Girl Scouts of San Diego, where he chairs its Investment Committee. Rick has been helping clients with their financial affairs since 1996 following six years as an officer in the U.S. Navy. Rick is a past president of the CFA Society of San Diego and served on its Board of Directors in various capacities from 2001-2009. He is a member of the Financial Planning Association, the National Association of Personal Financial Advisers, the CFA Institute, and the Estate Planning Council of San Diego. Rick is also a contributing columnist for *The Presidio Sentinel*, a community newspaper serving the Mission Hills, Loma Portal and Point Loma neighborhoods. Rick earned his BA in political science in 1989 from Duke University.

**Efrem Bycer** is the Vice President of Momentum, LLC where he developed BoardNEXT as an initiative to connect young professionals with nonprofit board service. His nonprofit experience includes working with a variety of nonprofits, from small start-ups to century-old legacy institutions. He has also worked extensively with local governments in Syracuse, New Orleans, New York and San Diego. A recognized expert in governance and board development, Efrem is YNPN's national advisor for its efforts to engage emerging leaders in nonprofit board service. He is listed nationally as a "30 under 30" to follow on Twitter for nonprofit advocacy efforts. Locally, Efrem is on the board of YNPN San Diego and serves on the Head Start Policy Council with Neighborhood House Association.

**Ann Spira Campbell** is Executive Director of Marketing and Development at the San Diego Opera. Ann has more than thirty years of experience in the field of resource development, marketing and administration. For the past thirty years, Spira Campbell has held various posts at San Diego Opera, one of the top eight Opera companies in America. For her first fourteen years with the company,

she served as the Director of Development, overseeing all development efforts including the Annual Fund, Endowment, and long term capital needs. In 1997, Spira Campbell was promoted to the Opera's post of Director of Strategic Planning and Special Projects — overseeing both the marketing and development departments as well as the Opera's \$90 million five year strategic plan. A native of Milwaukee, Spira Campbell attended Indiana University School of Music as a Voice Performance Major in Opera and pursued graduate coursework in Communications at the University of Wisconsin — Madison. Ann has served on various boards, advisory boards and committees, including: Board Member of The World Trade Center San Diego, Congregation Beth Israel, The San Diego Youth Symphony Orchestra and The California Playwright's Project; and Advisory Board Member of Scripps Memorial Hospital La Jolla.

**Mary Ruth Carleton, MA**, is SDSU's Vice President for University Relations and Development and CEO of the Campanile Foundation, the university's philanthropic board. Ruth also heads SDSU's government and community relations, marketing and communications, public affairs and alumni relations. Ruth's early career includes 17 years as a TV news anchor and reporter during which she worked for major broadcast networks and traveled extensively overseas. Ruth is affiliated with the Council for Advancement and Support of Education, the National Council for Planned Giving and the Association of Fundraising Professionals from where she holds the designation of Certified Fundraising Professional.

**Elizabeth Castillo, MA**, is the Associate Director for the USD Institute for Nonprofit Education and Research. She has more than 20 years of nonprofit fundraising experience, securing more than \$27 million for cultural organizations, schools, community health clinics, and government agencies in Southern California. Elizabeth holds a master's degree in nonprofit leadership and management from the University of San Diego. She is currently enrolled in the PhD Program in Leadership Studies specializing in nonprofits and philanthropy. Her research interests include organizational learning, governance, and collaboration in nonprofit agencies.

**Grace Chaidez** joined the Larry English L.E.A.D. Foundation as Assistant Director in September 2011 where she is working to build the capacity of the organization to better serve at risk youth in San Diego and Chicago. Prior to joining the foundation, she dedicated herself to developing and managing programs at Reality Changers — a well-regarded San Diego-based nonprofit helping at risk youth prepare for higher education. Grace is also a board member of the Kiwanis Club of San Diego. Grace was awarded her master's degree in nonprofit leadership and management from the University of San Diego in August 2012; she holds an undergraduate degree from UCSD.

**Alberto Cortés, MBA**, has served as Executive Director of Mama's Kitchen for over 10 years. Mama's Kitchen is a volunteer-driven organization that responds to the nutritional needs of men, women and children affected by HIV/AIDS or cancer throughout San Diego County. Additionally, Alberto has served as Board President for McAlister Institute, and as board member of The Association of Nutrition Services Agencies, a national membership organization. He is an active member of the Gay, Lesbian, Bisexual and Transgender Community Leadership Council and serves on the advisory board of USD's Institute for Nonprofit Education and Research. Alberto

has twenty-two years of experience in planning, implementation, management, governance, and evaluation of human services programs, and as many years of board service for nonprofit social services and arts organizations. He holds a master's degree in business from San Diego State University.

**Serge Dedina, PhD**, is the Co-founder and Executive Director of WiLDCOAST. He is the driving force behind the organization's numerous accomplishments, which earned him the 2009 San Diego Zoological Society's Conservation Medal as well as the California Coastal Commission's "Coastal Hero" Award. In 2003, he received the Surf Industry's Environmental Award in recognition of his role in helping defeat the Mexican government's Nautical Ladder mega-marina plan. Before co-founding WiLDCOAST, Serge was the former founding director of The Nature Conservancy's Baja California program as well as the Sea of Cortez program. Serge received a PhD in geography from the University of Texas at Austin, a MS in geography from the University of Wisconsin-Madison, and a BA in political science from the University of California, San Diego. He is the author of two books: *Saving the Gray Whale*, a book based on the three years he lived in the gray whale lagoons of Baja California, and *Wild Sea: Eco-Wars and Surf Stories from the Coast of the Californias*, published in early 2011.

**\*Laura Deitrick, PhD**, serves as the Director for the Caster Family Center for Nonprofit and Philanthropic Research at the University of San Diego. She has been a nonprofit executive director, board member, management consultant, and researcher on major nonprofit trends. Her research has led to important reports on nonprofit ethics, nonprofits and public education, nonprofit human resource practices, executive transition, the economics of San Diego's nonprofit sector, nonprofit confidence, and regional grantmaking. In her role as Director of the Caster Center, Laura oversees the work of 6 doctoral students and other affiliated faculty. She is a faculty member in USD's Nonprofit Leadership and Management master's program where she teaches nonprofit research methods, program design, and evaluation and also serves as an adjunct faculty member at the University of California San Diego, where she teaches a graduate course in nonprofit management in the School of International Relations and Pacific Studies.

**Larry English** is the founder and chair of the Larry English L.E.A.D. Foundation—leading education to athletes for their dreams. Larry is also the San Diego Chargers' outside linebacker with whom he has been associated since 2009. He has a long and superb athletic and academic history embodying the true meaning of a student-athlete beginning at Marrion Academy, Illinois and continuing through his graduation at Northern Illinois University where he won numerous regional and national awards for both sports and scholarship. Recognizing the importance of academics in his preparation for success, Larry and his mother, Susan, launched the foundation in 2010 with hopes of spreading this message to youth in Chicago and San Diego and to his fans worldwide.

**Susan English** is founder, president and CEO of the Larry English L.E.A.D. Foundation. Susan is a former corporate sales representative, community advocate and philanthropist whose accomplishments span the arenas of sales, education, entrepreneurial ventures and humanitarian causes. In 2010, after 30 years of success in the private sector, she decided to lead her son's philanthropic efforts providing vision, support, overall direction and board development

to the foundation. Among her many achievements, she has brokered partnerships with SDSU, KPBS Public Broadcasting, Palomar Pomerado Health, the California Chapter of the American Lung Association, the San Diego Sports Commission, and Jimmy Johnson Chevrolet. Susan has a profound interest in community development, community initiatives and community service. She also has volunteered with GSA, BSA and National Big Sisters. Susan holds a bachelor of science degree in liberal arts from Southern Illinois University.

**\*Carole M. Fish, ME**, has spent more than 26 years in the nonprofit sector. After receiving a master's in education at the University of San Diego, she began a career that has spanned several organizations including the American Cancer Society, Scripps Green Hospital, Scripps Hospitals, Children's Hospital and Health Center and Jacobs Center for Neighborhood Innovation. She has also served as a development consultant for more than 13 years and is President of Fish and Lewis Consulting. Carole specializes in nonprofit strengthening, strategic planning, campaign and fundraising planning, feasibility studies, case for support, organizational branding, leadership development and nonprofit coaching. Carole was recently awarded the Outstanding Development Professional Award by the Association of Fundraising Professionals.

**Ron Lee Forster** is Board Secretary of WiLDCOAST. He has extensive product management experience at Hewlett Packard, including analysis and research of target markets. Additionally, he has led international business planning processes and marketing campaigns.

**Robert Gaan, CFP, PFP**, has served as the Chair of the Board of Directors for the San Diego Youth Symphony and Conservatory since 2011. Rob joined the SDYS board in 2005 and served as Treasurer for five years prior to becoming Chair. As Chair, he is leading the Board of Directors' effort to "make music education accessible and affordable to all children in San Diego county." Rob is a Managing Director at Christopher Weil & Company, Inc. a local firm where he is one of one of its four Investor-Manager-Advisors. Rob earned a BA in economics from University of California, Los Angeles in 1984.

**Shannon Gonzalez, CPA** has over 15 years accounting experience. She has worked in AKT's public sector niche for 6 years and has developed an expertise in nonprofit accounting and audit services, including voluntary health and welfare organizations, foundations, religious organizations and governmental agencies. Shannon also specializes in developing best practices and process improvements related to an organization's internal controls and accounting procedures. Shannon holds a bachelor of arts degree, Magna cum laude, from University of California San Diego and a professional certificate in accounting from University of California San Diego Extension. Shannon is a licensed Certified Public Accountant in the state of California and is a member of the AICPA and California Society of CPAs. AKT is a co-sponsor of this event.

**\*Zachary Green, PhD**, is a visiting professor in USD's Department of Leadership Studies. Zachary also works as a coach and consultant to organizations ranging from local nonprofit advocacy groups serving marginalized populations to multinational institutions focused on global development. For more than a decade his coaching has been primarily with top leaders and high potential managers globally though the World Bank. His teaching and research focuses on group behavior, human development, identity, dialogue, and negotiations.

\* denotes USD Institute for Nonprofit Education and Research faculty

## Faculty Biographies

Increasingly Zachary’s work in the Department as an Associate Director of the Leadership Institute attends to issues of mindfulness, consciousness, reflective practice, and social justice action.

**Fran Holian, RADF (Royal Australian Defense Force), US Navy RET, MBA**, is Chair of United through Reading. He is a 1968 graduate of the US Naval Academy, where he was a Surface Warfare Officer throughout his 28-year naval career, commanding three ships prior to being selected for Flag Officer in 1991. Fran holds a master’s in business administration (financial management) from the Naval Post Graduate School. One of his favorite assignments was as the “Navy Mayor” of San Diego. After retiring from the Navy in 1996, Fran became a Vice President/General Manager for Northrop Grumman Corporation.

**Neil G. Hokanson, CFP, MBA**, is president of the Rancho Santa Fe Foundation board of directors and president of Hokanson Associates, an investment advisory firm based in Solana Beach. HCM manages investment portfolios and provides financial counseling to pension plans, nonprofit organizations and high net worth individuals. During his career, Neil has been named as one of Bloomberg’s and Worth Magazine’s Top Wealth Managers and has served on the boards of Charles Schwab and U.S. Community Savings Bank. He has also been extensively involved in community work, serving on the San Elijo Lagoon Conservancy President’s Council, Quall Botanical Gardens board of trustees, Community Resource Center board of directors and the Olivenhain Town Council.

**Jo Dee Jacob** has been President/CEO of Girl Scouts of San Diego since 2001 after she retired as Captain from a 27-year career in the U.S. Navy. Her last tour of duty was commanding officer of the naval station in Guam. During her tenure, Girl Scouts has been named Nonprofit Organization of the Year by *San Diego Magazine*, received a Better Business Bureau Torch Award for Marketplace Ethics, USD’s Kaleidoscope Award for Exceptional Governance and the Friends of Balboa Park Millennium Award. *San Diego Business Journal* named Jo Dee Most Admired CEO and she also received a Nonprofit Leadership Fellowship to Harvard Business School. She holds degrees from Stanford and Pepperdine Universities and serves as President of the San Diego Rotary.

**Jennifer A. Jones, MA**, a Research Assistant at the USD Caster Family Center for Nonprofit and Philanthropic Research, has been active in the nonprofit field in San Diego for more than a decade, working and volunteering for organizations with annual budgets ranging from less than \$100K to more than \$31M. She holds a bachelor’s degree in global economics from UC Santa Cruz, a master’s in nonprofit leadership and management from the University of San Diego, and is pursuing her PhD at USD in Leadership Studies, specializing in nonprofits and philanthropy. Jennifer speaks four languages and has worked with nonprofits in Brazil, the Dominican Republic, Haiti, Peru, and throughout San Diego. She has served on the board of the San Diego Human Dignity Foundation, the third largest LGBT focused community foundation in the United States. Jennifer has also won numerous awards including: Award of Distinction from the Institute for Nonprofit Education and Research (2008) and the Dee Warfare Kutch Volunteer Administrator’s Award (2007). Jennifer’s nonprofit resource blog can be found at [www.jenniferamandajones.com](http://www.jenniferamandajones.com).

**Marjory Kaplan** is President and Chief Executive Officer and Miriam and Jerome Katzin Presidential Chair at the Jewish Community Foundation of San Diego, where she has served since 1994. She has transformed a relatively small organization into a philanthropic leader, regionally and nationally. During her tenure more than \$700 million in grants have been awarded for education, healthcare, the arts and social services in both the Jewish and general community. Under Marjory’s entrepreneurial leadership, the Foundation has developed innovative programs – particularly in the area of endowment building and youth philanthropy – that have become national models. The Jewish Community Foundation of San Diego is a co-sponsor of the event.

**Tom Karlo** has been KPBS’ general manager since February 2009. His career at KPBS began in 1973 as a part time assistant while attending San Diego State University. Prior to becoming general manager, he served as associate general manager for more than a decade. For the past 35 years, Tom has spent many of his fall weekends as a cameraman for NFL Films. He has filmed 13 Super Bowls and received a National Emmy for Sports Cinematography. Tom spends much of his time representing KPBS in the community, and serves on the boards of the California Public Television, Public TV Major Market Group, PBS National Datacast, Inc., Pacific Mountain Network, Pacific Southwest Chapter MS Society, and SDSU Alumni Association. He is also a member of San Diego Downtown Rotary.

**Eric Klein**, President of Dharma Consulting, is a leading voice in the movement to bring greater spirit, meaning, and authenticity to the workplace. His transformative message and practical approach have helped leaders create organizations where values and purpose fuel productivity, accountability, and collaboration. His clients include: AT&T, Hewlett Packard, Southern California Edison, NCR Corporation, Qualcomm, General Dynamics, Department of the Navy, IBM, Computer Sciences Corporation, Kaiser Permanente, Citrus Valley Health Partners, St. Joseph’s Health Center and San Diego Children’s Hospital. Eric’s book, *You are the Leader You’ve Been Waiting For: Enjoying High Performance and High Fulfillment at Work* won a 2008 Nautilus Book Award as a world-changing book promoting positive social change and responsible leadership.

**Colleen Krause** brings more than seventeen years of experience in education, nonprofit administration, and refugee programming. Recognized as an International Rescue Committee National Field Expert, she has provided technical assistance to refugee programs throughout the United States. She has served on the San Diego Women’s Foundation Board of Directors since 2009. She is currently earning her master’s degree in nonprofit leadership and management at the University of San Diego.

**Diana Landis, CPA**, is the Chief Financial Officer for San Diego Center for Children. She began her career with Deloitte and Touche gaining more than 30 years experience in accounting, mergers/acquisitions, divestitures, risk management, treasury, Sarbanes-Oxley compliance, and other business operations. Four years ago Diana joined the executive staff of the San Diego Center for Children as the director of finance. The Center is a 125-year-old nonprofit organization-serving child with severe emotional, behavioral, and mental challenges. As a foster parent herself, Diana is passionate about meeting the needs of all children and creating opportunities for them to become healthy adults. She is a graduate of San Diego State University with a BS degree in accounting and is currently enrolled in

the University of San Diego’s Nonprofit Leadership and Management master’s degree program.

\***Elaine Lewis, MA**, has worked with nonprofit organizations for 41 years. She has been the executive director for Developmental Services Continuum, Inc. (DSC) for the past 17 years. DSC supports individuals with developmental disabilities in licensed homes, in their own homes and where they work. Elaine received her bachelor of science degree in psychology from San Diego State University and a master’s degree in nonprofit leadership and management from the University of San Diego. She is currently a USD faculty member teaching Risk Management and is a USD doctoral student in Leadership Studies specializing in nonprofits and philanthropy.

\***Pat Libby**, Clinical Professor, is a pracademic – someone who seamlessly traverses the ivory tower of academia and the spinning-plates-on-sticks reality of running and managing nonprofit and philanthropic organizations. She directs the Institute for Nonprofit Education and Research at the University of San Diego, which comprises a master’s program, research center, doctoral specialization and extensive community education programs focused on nonprofits and philanthropy. In creating the Institute, Pat realized a vision for an academic center that would interweave theory with applied learning. Since the Institute’s inception a decade ago, students have completed more than 700 consulting projects for nonprofits and foundations using this pedagogy. A Boston native, Pat has served as a senior executive, board member, and consultant to innumerable nonprofit organizations and foundations since 1978. Her book, *The Lobbying Strategy Handbook*, (Sage Publications, 2012) is an engaging “how-to” guide for nonprofit practitioners who are seeking a simple blueprint for learning how to take part in the legislative process. She has additionally taught nonprofit management at the Massachusetts Institute of Technology, the University of California San Diego, and at San Diego State University. She holds an undergraduate degree in Sociology from Tufts University and a graduate degree in urban planning from MIT.

**Mike Lichtenberger, CPA**, is a Shareholder of Mayer Hoffman McCann P.C. and a Managing Director at CBIZ MHM, LLC. He has been with the firm since 1991 and focuses on several different industries. Mike is a former chair of the MHM review of financial statements, internal controls, and business consulting for public & private companies, employee benefit plans and nonprofit organizations. Mike is a CPA in California. He has a bachelor of arts degree in Accounting from the University of Northern Iowa. He is a member of the American Institute of Certified Public Accountants. Mike is on the Audit and Investment Committees of Arc San Diego and on the Board of Directors of Arc Foundation. Mayer Hoffman McCann P.C./ CBIZ MHM, LLC. is a co-sponsor of the event.

**Bill Littlejohn** is the Chief Executive Officer of the Sharp HealthCare Foundation and Senior Vice President of Sharp HealthCare. In addition, he provides fundraising counsel to the Grossmont Hospital Foundation, Coronado Hospital Foundation and all of Sharp’s entities. Prior to joining Sharp HealthCare, Bill worked for 10 years with the Greenwood Company, a professional fundraising firm. He has managed fundraising projects for healthcare systems all over the United States, including Sutter Health in Northern California, Alegent Health in Nebraska and Iowa, Intermountain Health Care in Utah, Memorial Health Services in Southern California, Providence

Health System in the western United States and Hawaii Pacific Health. Bill is a 1980 graduate of the University of Virginia with a bachelor of arts in economics. Bill is chair of the board of directors of Santa Fe Christian Schools.

\***Mary McDonald, PhD**, joined the USD School of Leadership and Education Sciences faculty in September 2008. She was previously the director of the Community Research Institute (CRI) at the Dorothy A. Johnson Center for Philanthropy and Nonprofit Leadership at Grand Valley State University in Grand Rapids, MI. In that capacity Mary was regularly involved with both community-based and university-based research in philanthropy and the nonprofit sector. Her most recent research, “International Philanthropic and Nonprofit Studies Education — Creating Sustainable Social Change,” was presented at the International Society for Third-Sector Research Conference in Barcelona, Spain in 2012.

**Deanna Martin Mackey** is a Girl Scouts of San Diego board member and president of its board development committee following a six-year stint as president of the strategic planning committee. She also serves as a Brownie Troop Leader for 26 girls in 3rd grade. Deanna is the KPBS Station Manager, serving as COO of all KPBS media operations and its 160 employees. Prior to becoming the station manager, she spent 10 years as the Associate General Manager for Marketing, Education and New Media. In the fall of 2010 Deanna was named one of five “Women who Move the City” by *San Diego Magazine* in recognition of her 20-year career at KPBS and her ongoing volunteer work for the Girl Scouts. She earned her bachelor of arts from San Diego State University with a double major in journalism and political science.

**Andy Maffia, CPA**, Senior Manager, AKT serves as one of the lead auditors for the nonprofit group. Andy has provided audit, consulting, and tax services to variety of nonprofit organizations for the past nine years. He currently sits on the North County Hospice board of directors, where he serves as the audit committee co-chair and is a member of the finance committee. His earlier public accounting work includes working for another top 100 accounting firm in northern California, where he focused on audits and consulting engagements. Andy graduated from California Polytechnic State University, San Luis Obispo with a degree in finance and accounting. He is a member of the California Society of Certified Public Accountants and the American Institute of Certified Public Accountants. AKT is one of the top 100 firms in the U.S. with offices in San Diego, Portland, Salem and Alaska. AKT is a co-sponsor of this event.

**Deidre Maloney** helps organizations meet their missions through better business, and helps their leaders sleep better at night. She does it through her work as a published author, national speaker, and proud president of Momentum, LLC. Through presentations and corporate trainings, as well as customized services like strategic planning, board development, and marketing services, Deidre helps organizations meet and exceed their goals. She gained much of her experience through her role of executive director of a multi-million dollar nonprofit and by serving on numerous boards. Her writings and articles have appeared in a number of print publications and her blog on leadership is a hit. Her new book, *Tough Truths: The 10 Leadership Lessons We Don’t Talk About* was released in October 2012.

**Janine Mason, MA**, is the executive director of the Fieldstone Foundation and a program officer at the Weingart Foundation. She

## Faculty Biographies

joined Fieldstone in 1988 and has served as its leader since 1999. In this role she is responsible for the overall management of the Foundation's giving program and leadership training programs in Orange and San Diego Counties. Janine received her undergraduate degree in psychology from the University of San Diego. She holds a master's degree in nonprofit leadership and management from USD. Janine is a 2006 graduate of the Executive Program for Philanthropy Leaders from the Graduate School of Business at Stanford University. Janine is a member of USD's Nonprofit Leadership and Management Program Advisory Board, serving as co-chair beginning in 2013. Throughout her career, she has also served on various boards in the San Diego community, including San Diego Grantmakers, Cathedral Catholic High School Endowment Committee, San Diego Blood Bank Foundation, Harmonium, The Children's Initiative, the National Society of Fundraising Executives, and the BIA Cares Foundation.

**Patricia Jo Mayer, CPA** received her BS degree in business administration and accounting, at San Diego State University in 1983. She is a Senior Tax Manager for Moss Adams, LLP, where she specializes in tax and related tax planning with emphasis in not-for-profit organizations and private foundations. Patty is Moss Adams' Southern California regional nonprofit tax expert and quality control tax reviewer for nonprofit audit reports. Patricia serves on Moss Adams' Not-for-Profit Tax Committee. Patricia is a member of the California Society of Certified Public Accountants and the American Institute of Certified Public Accountants. She is on the Finance Committee for the San Diego Grantmakers, and is a member of the Professional Advisory committee for the San Diego Foundation. Moss Adams, LLP, is a co-sponsor of this event.

**Ron Mitchell, CPA**, Lead Audit Partner AKT, specializes in nonprofit, health care and agriculture organizations. Over his expansive professional career, Ron has written and spoken on various governance issues affecting nonprofits. Ron's community involvement includes board membership at San Diego Medical Society Foundation and President of the Mira Costa College Foundation. He is also a member of the American Institute of Certified Public Accountants, the Healthcare Financial Management Association and the California Society of Certified Public Accountants. AKT is a co-sponsor of this event.

**Tim O'Malley, PhD**, is USD's Vice President for University Relations. He has spent over 36 years in education as instructor, administrator, and advocate. Tim began his career in 1973 as an English teacher at the high school and community college levels, first in Nebraska and then in California. He has served on numerous boards and committees in the non-profit sector, including those for the Council for Advancement and Support of Education; CASE District VII and District VIII; Burn Institute of San Diego; Forest Grove Chamber of Commerce; St. Anthony's Catholic Church; Home Health & Hospice of Southeastern Washington; Washington County Hospice Foundation; the WSU Foundation; Pullman Memorial Hospital; St. Mary's School Foundation; and Valley Catholic High School. Tim earned his bachelor of arts degree in English from the University of Portland, a master of arts degree in English from California State University East Bay, and a PhD in educational policy and management from the University of Oregon.

**John Ohanian, CPA**, is CEO of 211 San Diego. Under his team's leadership, 211 San Diego has gone from helping 100,000 clients per year to more than 400,000, receiving numerous awards including

County of San Diego's Public Health Champion Award, San Diego's Best Places to Work and Computerworld's 2010 Information Technology Laureate Award. He is a University of San Diego graduate who earned his CPA while working at KPMG Peat Marwick in San Diego. Previous to his appointment as CEO of 211 San Diego, John worked at the Alzheimer's Association – San Diego/Imperial Chapter, serving as the vice president of finance, operations and planned giving. John is a member of the California Alliance of Information and Referral Services and the Community Health Improvement Partners Board of Directors. He is a past member of the Vistage program, a graduate of the Fieldstone Foundation Executive Leaders Group, LEAD San Diego and the Harvard Business School Executive Leadership Program. He sits on the 211 US Committee, the 211 California Leadership Team, the YMCA Board of Directors and USD's Institute for Nonprofit Education and Research Advisory Board.

**Lina Park, MA**, is the membership director of Pacific Arts Movement (Pac-Arts), formerly known as the San Diego Asian Film Foundation. She brings more than 15 years of experience in both communications and development. Lina oversees and manages the membership program, which includes broadening individual and corporate memberships, major gifts initiatives, special events and database management. Lina holds a bachelor of arts degree in English from Emory University in Atlanta, Georgia and is an alumna of USD's Nonprofit Leadership and Management master's degree program.

**Marion Paul** is an experienced policy analyst and a nonprofit professional. Before joining San Diego Social Venture Partners, Marion most recently served as Equinox Center's first Executive Director, a nonprofit founded by San Diego Social Venture Partners to ensure that San Diego maintains its exceptional quality of life as its population expands. Marion has an extensive policy background, serving as Senior Policy Analyst in the Colorado Governor's Office, Executive Director of Jobs for Colorado's Future, and as Public Affairs Manager at the Denver Metro Chamber of Commerce. Her background includes work on planning the Denver International Airport, developing regional cooperation, and assessing the cumulative impacts of multiple large projects in the Denver region. Marion is a graduate of LEAD San Diego, a former Board Member of the San Diego Social Venture Partners and former Member of the San Diego Women's Foundation. Marion holds a BA in political science and a BS in geology from the University of Illinois.

**Hollyce J. Phillips** brings more than 20 years experience in the world of television and communications to her philanthropic work in the San Diego community. She has served on the board of Girl Scouts San Diego since 2007. She is immediate past chair of its Board Development Committee, is currently leading the Strategic Planning Committee, and has served on the Executive Committee. Other community work includes serving on The San Diego Foundation's Board of Governors and its Executive and Strategic Planning Committees. Based in Carlsbad, Hollyce is also a founder and the immediate past chair of the Carlsbad Charitable Foundation. She is a member of the San Diego Women's Foundation, has served as a member of The San Diego Foundation's North County Coastal Civic Alliance and been honored by The North County Philanthropy Council as a Volunteer of the Year. She holds a BA from Stanford University and did master's work at the University of Minnesota Graduate School of Journalism.

**Nancy Rix, CPA**, is San Diego Children's Center audit committee chair and a managing partner in Dickerson Rix & Company, LLC, a full service CPA firm located in Rancho Bernardo. She has over 25 years of experience in advisory and assurance services, having served both multi-national and small to midsize enterprises. Nancy began her career with Arthur Young and transitioned to Bank of America as a technical analyst, responsible for dealings with the Financial Accounting Standards Board. She was a Senior Manager and then Director with Ernst and Young, LLP and PriceWaterhouse Coopers, LLP, respectively, in their Chicago based specialty transaction services groups. In 2002 Nancy moved to San Diego to start the assurance services practice of Dickerson Rix & Company, LLP. She is a CPA with an MBA in finance from the University of Chicago. She is an active member of the AICPA & California Society of CPAs and is licensed in California and Massachusetts.

**\*Jessica Robinson, MSW**, is the Executive Director of the Consensus Organizing Center at SDSU where she is also is a lecturer in the School of Social Work. In addition to her work at SDSU, Jessica is a faculty member of the University of San Diego's nonprofit leadership and management master's program. Jessica was trained in Consensus Organizing by Michael Eichler, creator of the model, and chosen by him to spearhead the work of his organizing center. She has more than 12 years experience in administration, program development, and grant writing for programs involving at risk and underserved populations. Jessica is best known for her work with foster youth and, specifically, for her role in developing and operating a specialized high school graduation and post-secondary education program for foster youth. A San Diego native, Mrs. Robinson earned both her bachelor's degree in social work and master's in administrative social work from San Diego State University.

**Elsa Romero, CPA**, an Audit Partner at AKT, leads the public sector and nonprofit group. AKT is one of the top 100 firms in the U.S. with offices in San Diego, Portland, Salem and Alaska. Elsa provides consulting and tax services to a variety of clients from small to medium size business, specializing in a variety of nonprofit organizations including Unrelated Business Income Tax (UBI) issues. Her early public accounting experience included providing auditing services to a variety of nonprofit agencies performing audits as required by OMB A-133 and a variety of federal and state programs, such as audits of California Department of Education-Child Development, Nutrition and Adult Basic Education Programs. Elsa graduated from San Diego State University with a BS degree in business administration with an emphasis in accounting. She is Vice President of Finance and Revenue Enhancement of SDSU Alumni Association, a member of the California Society of Certified Public Accountants and the American Institute of Certified Public Accountants and is bilingual in English/Spanish. AKT is a co-sponsor of this event.

**\*Fernando Sañudo, MPH**, is the Chief Executive Officer of Vista Community Clinic. He has worked at the Clinic since 1988, formerly serving as Clinic Administrator and Director of the Health Promotion Center. He holds a BA in biology from UC San Diego and a master's degree in public health from San Diego State University. He teaches program design and evaluation at the USD's Nonprofit Leadership and Management graduate program.

**Justin Schaberg** is Member Services Associate for San Diego Grantmakers. Prior to moving to San Diego he worked for the Open

Society Institute — Baltimore as a Program Associate for the Criminal and Juvenile Justice and the Education and Youth Development programs. Justin's practical experience has been underscored with academic training in nonprofit management from the Institute for Policy Studies at Johns Hopkins University. He is continuing his studies in the University of San Diego's nonprofit leadership and management master's degree program. Prior to working at OSI, Justin was a volunteer English teacher in Hungary and worked in the IT department at a cancer research center in Seattle, Washington. He holds a degree in central and east european studies from the University of Colorado.

**Todd R. Schultz**, Director of Development at The Old Globe, attended Kansas State University in Manhattan, where he received a BA in mass communication and modern languages, specializing in advertising and German. He also attended Justus-Liebig University in Giessen, Germany, studying German literature and music history and theory. In 1989, Todd joined the staff of The Atlanta Opera, where he served as Director of Marketing and Public Relations through 1994. In December of that year, he became Director of Marketing and Public Relations at the San Diego Opera and in 2001 moved to the Los Angeles Opera as Director of Sales and Marketing, where in just three years he increased record attendance for a single production by 31%. In 2004, Todd joined the staff of The Old Globe as Director of Development. He has served as a member of the OPERA America Committee for Public Awareness and has consulted in marketing and strategic planning for opera companies in the United States and Germany.

**\*Liz Shear, MA**, has been an active member of the San Diego community since 1969. She has served as a volunteer, longtime executive director of San Diego Youth and Community Services, interim executive director, community facilitator, educator, and board and public commission member nationally and locally. From 1970-1995, Liz's work supported systems for empowering youth, strengthening families and developing communities with a focus on services for runaway, homeless and foster youth. For the past 17 years Liz has consulted and been a thinking partner on key organizational issues in the voluntary sector and the music business. Her specialties are systems design and development, governance, board leadership development, collaborative leadership, resource development, organizational development, conflict resolution and organizational coaching. Liz is the originator and director of the USD Governance Symposium.

**Dalouge Smith** has been President and CEO of the San Diego Youth Symphony and Conservatory since 2005. At SDYS he has overseen development of the organization's vision to "make music education accessible and affordable for all students in San Diego County." In pursuit of this vision, Dalouge has transformed SDYS from solely a program provider into a catalyst for restoring and strengthening music education in schools. Along with using its flagship orchestras and ensembles in pursuit of this goal, in 2010 SDYS launched its first community music program designed to build support for school music through measurement, partnerships, community awareness, and community action. He is highly regarded as an arts advocacy leader who also serves as Vice President of California Arts Advocates and Vice President of Balboa Park Cultural Partnership. He served as the Chairman of the San Diego Regional Arts and Culture Coalition for

eight years, until 2010. Dalouge is also a guest editorialist on the arts for the San Diego Union Tribune, the author of the arts advocacy blog “Dog Days” at the national website artsjournal.com and is a regular speaker on the community impact of the arts at local events as well as state and national conferences. He received the 1<sup>st</sup> Annual Herbert G. Klein Visionary Award for Exemplary Leadership from LEAD San Diego and was also named one of San Diego Metropolitan Magazine’s 2006 “40 Under 40” young leaders. Dalouge earned his bachelor of arts in world arts and cultures from UCLA and worked as a child actor in professional regional theatre productions through high school.

**Kea Spurrier** is the associate development director at the Zoological Society of San Diego. She manages a team of individual gift officers who solicit major and planned gifts for the Zoological Society of San Diego’s comprehensive capital campaign. Kea and her team help generate support for the San Diego Zoo, San Diego Zoo Safari Park, and the conservation efforts of the San Diego Zoo Institute for Conservation Research. Prior to joining the Zoo in 2002, Kea worked for almost a decade in higher education at the University of California, San Diego in Development and Alumni Relations. Kea is pursuing her master’s in nonprofit leadership and management at the University of San Diego with an expected graduation date in 2013.

**Mark Stuart, MS**, is Chief Development and Membership Officer at the San Diego Zoo Global and President of the Foundation of the Zoological Society of San Diego, where he leads a staff of 60 for the Zoological Society of San Diego’s Development and Membership Department. San Diego Zoo Global is in the early stages of its first-ever comprehensive campaign (raised through April 2011: \$175 million; goal through December 2015: approximately \$350 million). In addition, he spearheaded the formation of the Foundation of the Zoological Society of San Diego in 2006 and serves as its founding president. Mark received a master of science in educational administration from Western Maryland College and a bachelor of arts from Albion College. Mark is a member of the Rotary Club of San Diego. He speaks frequently at Council for the Advancement and Support of Education (CASE) conferences on topics such as major gifts strategies, volunteer engagement, and donor communications.

**Shelly Stuart, CFRE, CSPG, CAWA**, Vice President of Endowments, San Diego Humane Society, oversees the fundraising and development, public relations and marketing, and education and community outreach divisions of the organization. She also served as the Capital Campaign Director for the Humane Society’s \$10 million capital campaign to build its new campus. During the 14 years that Shelly has lead the San Diego Humane Society’s development efforts, the organization has received more than \$130 million dollars in contributed income. She is a member of the planning committee for the Society of Animal Welfare Administrators annual Management Conference, and a member of the AFP Senior Initiative Team in San Diego. Shelly also holds the professional designation of Certified Specialist in Planned Giving.

**\*Donald E. Stump, MA**, brings over 25 years of experience with nonprofit organizations that serve youth and families in San Diego County and Boston, Massachusetts. Since he was appointed Executive Director in 2007, his accomplishments at Lifeline include leading the organization through a strategic planning and re-branding process and expanding sources of support to the organization. Don continues to serve as an instructor at the University of San Diego in

their nonprofit leadership and management master’s degree program and advisor on the Nonprofit Governance Symposium committee. Don holds a bachelor of arts in psychology and anthropology from Texas Tech University and a master of arts in counseling psychology from Boston College. He also holds a postgraduate certificate in chemical dependency treatment from Boston University. He is a graduate of Stanford University’s Executive Program in Nonprofit Leadership, LEAD San Diego, the Fieldstone Foundation Executive Leadership Program, and is an active volunteer with various community organizations.

**Katie Sullivan** is Girl Scouts of San Diego chair of the board of directors. In 2007, she led the successful \$5.5M capital campaign, resulting in a transformation of the Balboa Park headquarters property, as well as the mountain camps. She has been actively involved in the volunteer community of San Diego for the past 25 years and served as a Girl Scout leader and service team member from 1985-2007. Her library affiliations currently include Vice Chair of the Board of Directors of the San Diego Public Library Foundation and member and former chair of the City of San Diego, Board of Library Commissioners. She is founding member of the Hidden Valley House Auxiliary, a women’s shelter of the Center for Community Solutions. She has been honored by the San Diego Public Library as Volunteer of the Year and by the community of Scripps Ranch as their Citizen of the Year. Girl Scouts San Diego has conferred upon her their highest honor, the Puento de Oro Annual Award.

**Janendra Sykes, MA**, is the principal of Sykes and Associates, a consulting firm serving nonprofits with an emphasis on capacity building, fund development and grant writing. She serves small and medium size multi-service agencies that are experiencing rapid growth and serve at-risk youth, veterans and those living with AIDS/HIV. In addition to government and for-profit positions, her professional experience includes over 15 years of experience in the nonprofit sector: administration, grant/contract lifecycle management, program design and implementation. Her positions have ranged from front line staff to primary grant writer to executive director. She is an alumna of USD’s Nonprofit Leadership and Management master’s program.

**\*Paul Van Dolah** is the principal of Van Dolah & Associates, which specializes in serving nonprofit community organizations, medical groups and health care organizations. His areas of expertise are strategic planning and organizational development. Prior to establishing Van Dolah & Associates, Paul served as Executive Vice President and Chief Operating Officer at San Diego Children’s Hospital and Health Center from 1988 through 2003. Paul has over twenty-five years in senior leadership positions in hospitals across the United States.

**Joe Watkins, PhD**, is Vice President of External Relations for Point Loma Nazarene University, where he leads a group of outstanding colleagues who are responsible for sustaining the future of the university through current and future revenue generation, development of charitable giving, strong brand development, community service and presence, alumni relations, legal and legislative oversight for the university as well as development of new revenue generation through external programs. The External Relations group generates nearly \$100 million annually for the university. As a member of the faculty of the Fermanian School of

Business he teaches courses in Management and Business Leadership. Currently Joe serves on the San Diego Opera Board, Board of Directors for the Charter School of San Diego, the Point Loma Nazarene University Foundation Board of Directors and is a member of Downtown Rotary.

**Ruth Westreich** is President of The Westreich Foundation and Co-Chair of USD’s Institute for Nonprofit Education and Research Advisory Board. She brings over thirty years experience as a creative marketing communications director and strategic marketing director in both the corporate and nonprofit sectors. She also currently serves on the board of directors of San Diego Grantmakers and Scripps Institute. Ruth works hands on with battered and abused women and children, children at risk, mentoring programs and literacy. She is the visionary responsible for the creation of the highly acclaimed new business book, *The Art of Original Thinking — The Making of a Thought Leader* written by award winning author, Jan Phillips, which won the Editor’s Choice Award from Allbooks Review. Her website is: [www.westreichfoundation.org](http://www.westreichfoundation.org).

**\*Christy Wilson, MA**, has served as the executive director of the Rancho Santa Fe Foundation since 1997. At the head of this growing organization, she is charged with leading the development function, overseeing more than 250 component funds and creating philanthropic and leadership opportunities in the San Diego County region. Christy is a member of several professional organizations

including the Association of Fundraising Professionals (AFP), North County Philanthropy Council, and the national Partnership for Philanthropic Planning. She is an Advisory Board member for the Institute for Nonprofit Education and Research at USD. As a Board Member of San Diego Grantmakers, she serves as Board Liaison for the Strategic Communications Committee. She is a member of ARCS (Achievement Rewards for College Scientists) and the Rancho Santa Fe Rotary Club. Christy holds a BS from the University of California, Davis, a lifetime teaching credential in the State of California and a MA from the University of San Diego. Rancho Santa Fe Foundation is a co-sponsor of this event.

**Sally Ann Zoll, EdD**, is CEO of United Through Reading. As their multifaceted leader, Sally serves as the chief guardian and spokesperson for the vision and mission, builds and sustains relationships with stakeholders and partners, and leads the UTR programs, finances, and internal team. In her distinguished career, Sally’s values for education are always evident. She has a doctorate in educational leadership and management, a master’s degree in special education from the University of San Diego and a BA in elementary education from Purdue University. From her first position as an elementary school teacher to her present leadership role, Sally has integrated her knowledge of education and educational technology with her talents for building and leading organizations of all sizes in the public, private and nonprofit sectors.





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**Upcoming Events :**

**Prospective Student and Alumni Mixer**

*Naval Training Center — 2508 Historic Decatur Rd. in the Hoffman Community Room*

Join Nonprofit Leadership and Management alumni to learn more about the master’s degree program. Enjoy good company and snacks as you hear firsthand from former students about the curriculum, what life is like as a graduate student, and what types of career benefits you can expect — 84% of our graduates have received promotions or new jobs after graduation!

**School of Leadership and Education Sciences Spring Open House 2013**

*Mother Rosalie Hill Hall*

Join the School of Leadership and Education Sciences for its Spring Open House. Meet program faculty, alumni, students, and staff; tour our state-of-the art, 80,000 square-foot building; and learn about our outstanding graduate programs in Counseling, Leadership Studies, Learning and Teaching, and Marital and Family Therapy. View a full listing of our graduate credential, master’s and doctoral programs.

Please note that the PhD in Leadership Studies, the MA in Leadership Studies, and the MA in Higher Education Leadership will not be included in this event because the application period will have closed for those programs.

**Please mark your calendars for the 10th Annual Nonprofit Governance Symposium.**

Please visit us at [www.sandiego.edu/nonprofit/symposium](http://www.sandiego.edu/nonprofit/symposium) for symposium presentations.

Thursday, January 24, 2013

Saturday, February 2, 2013

January 10 – 11, 2014

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