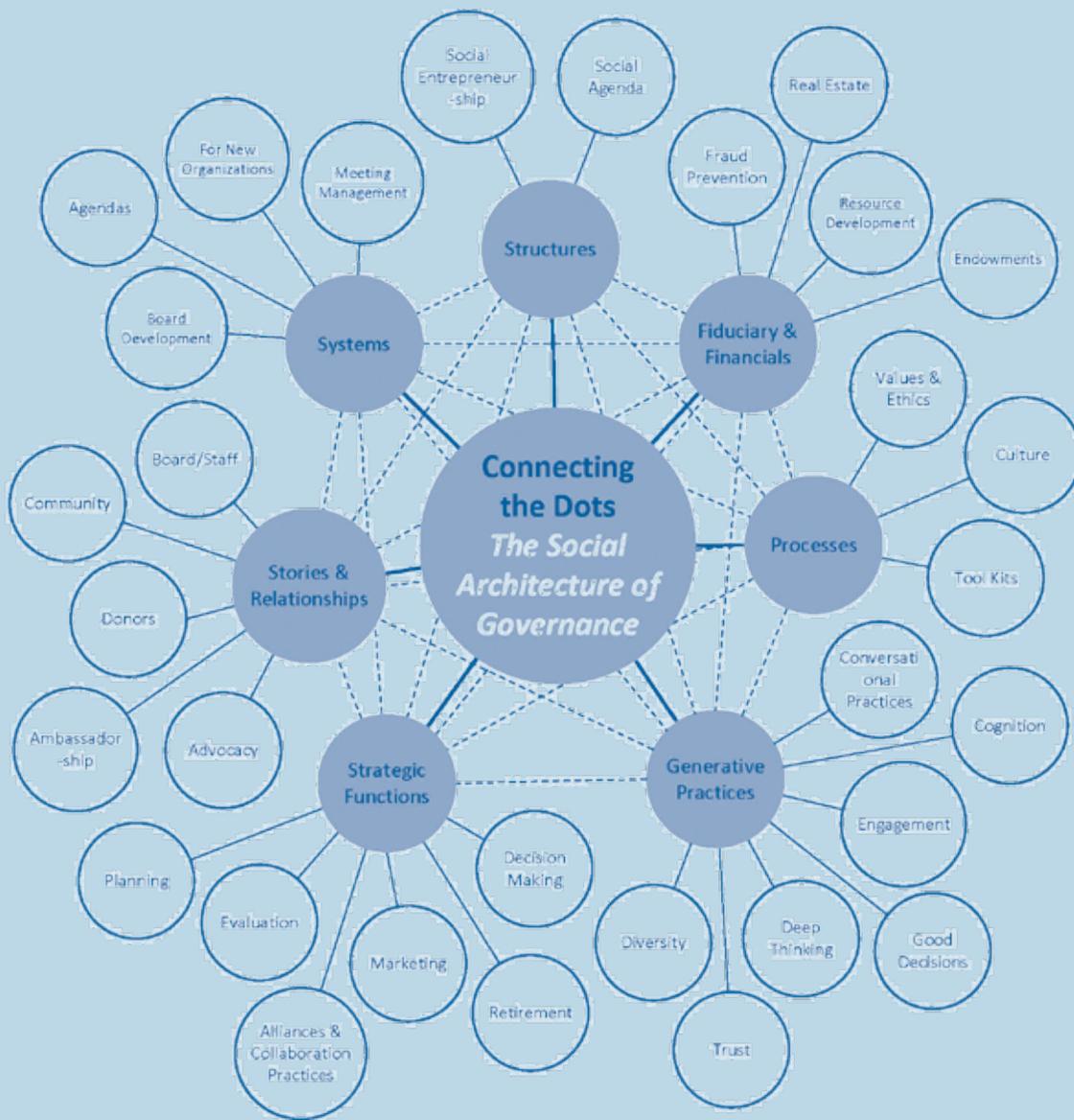


CONFERENCE PROGRAM

# Connecting the Dots: The Social Architecture that Undergirds Exceptional Governance

FRIDAY – SATURDAY, JANUARY 10 – 11, 2014

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



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# EXPLORING PRACTICAL AND COHERENT DESIGN

HELPING YOU BE THE BEST YOU CAN BE

## Schedule for Friday, January 10, 2014

- 8:00 Registration, Breakfast, and Networking
- 8:30 Opening Remarks
- 9:00 **Welcome: The Challenges of an Engaged Sector**  
**Pat Libby**, Professor of Practice and Director of the USD Nonprofit Institute  
**Liz Shear**, Director of the Annual Nonprofit Governance Symposium
- 9:30 Concurrent Seminars and Intensives
- 11:15 Mini-Lectures
- 12:30 Lunch  
A conversation between **Nancy Jamison**, Executive Director, San Diego Grantmakers and **Cynthia Olmstead**, group development expert and past President of the San Diego Women's Foundation, on how Trust Works to build and sustain exceptional governance. Their conversation is based on Cindy's new book, "Trust Works: Four Keys to Building Lasting Relationships", written in collaboration with Ken Blanchard and Martha Lawrence. The two will also discuss their work on how to develop successful boards.
- 1:45 Concurrent Seminars and Intensives continued
- 3:30 Presentation of the Eighth Annual Kaleidoscope Award for Exceptional Governance™ and panel conversation  
**Dr. Mary McDonald**, Chair of the Kaleidoscope Award Committee
- 4:15 Reception honoring the Kaleidoscope Award winner
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## Friday's Special Intensives

### 1. 10 Steps to Great Relationships: How to Build a Positive, Productive and Engaged Board **MRH 145**

Join experts **Marjory Kaplan**, CEO, Jewish Community Foundation San Diego and **John Ohanian**, CEO, 211 San Diego, as they help you build respectful and highly productive board cultures through a ten-step process tailored just for you. Participants will be asked to complete an assessment prior to attending the session and will leave with a personalized plan guaranteed to create the board of their dreams.

### 2. How to Prevent and Address Fraud **MRH 147**

There is more to preventing and addressing fraud than having good risk management systems. Unfortunately, and more often than we think, people we trust commit fraud and other illegal acts that damage our work and the reputation of our organization. Join **Nancy Young**, CPA, CISA, CFE and the rest of the **Moss Adams** expert team as they walk you through learning what you need to do to close the loopholes that encourage misappropriation, fraud, bribery and corruption.

#### Classroom Locations

MRH = Mother Rosalie Hill Hall

KIPJ = Kroc Institute for Peace and Justice

# Friday's Seminars and Mini-Lectures

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

### 1. Inside the 2013 Kaleidoscope Award for Exceptional Governance **KIPJ H**

Join board members and leaders from Francis Parker School in a free-ranging conversation as they share the governance processes, practices and conversations that have produced an engaged board of directors, engaged stakeholders, a lived mission, a sound financial status, and a broad based strategic plan. **A**

*William Jones, Chairman of the Board, Francis Parker Board of Trustees and Chief Executive Officer of CityLink Investment Corporation; Kathy Purdon, Board Governance Chair, Francis Parker Board of Trustees; Kevin Yaley, Head of School, Francis Parker School Facilitated by Dr. Mary McDonald, Chair of the Kaleidoscope Award Committee*

### 2. Values, Ethics and Principles **KIPJ I**

Learn why an organization needs to have an explicit code of ethics and how to create one. Two very different examples will be presented for you to scrutinize. The first involves a small, new nonprofit where the code helped the board develop organizational focus and an appropriate structure; the second involves a local branch of a national organization that wanted to tailor its code for local use. **A**

*Dr. Patti Saraniero, Principal, Moxie Research and USD Nonprofit Leadership and Management Faculty Member*

*With USD Nonprofit Leadership and Management master's students and alumnus: Shane Engel, Regional Church Leader, San Diego Church of Christ; Christine Houston, Legal Analyst, Neighborhood House Association; Kyra Tyson, Account Executive, United Way of Greater Los Angeles; and Derek Floyd with special guest Laura Farmer Sherman, Executive Director, Susan G. Komen San Diego*

### 3. Board and Executive Relationships **KIPJ 220A**

"Constructive Partnership" is one of the BoardSource "12 Principles That Power Exceptional Boards." What defines such a partnership, how do you develop one, how does it benefit your organization and how do you make it work in the day-to-day? The answers to these questions are the basis for a wide-ranging conversation among the experts and participants in this seminar. **A**

*Ron Mitchell, CPA, Partner, AKT; Elsa Romero, CPA, Principal, AKT; Andrew Maffia, ACPA, Audit Manager, AKT*

### 4. From the Masters: 11 Questions Every Donor Asks and Answers All Donors Crave – San Diego Style **KIPJ EF**

In his book, 11 Questions Every Donor Asks and Answers All Donors Crave, Harvey McKinnon, international fundraising guru, proposes a new conversation with donors based on their spoken or unspoken questions that ultimately influence their decision to give. Questions such as "Why me?" "Will my gift make a difference?" and "Why should I give to your organization?" are just a few examples that can make a difference between "YES" or "NOT NOW". Join San Diego's brightest senior fundraising executives in a panel presentation on how they address McKinnon's questions to raise millions of dollars in philanthropy and get consistent results. **E**

*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; Bill Littlejohn, CEO, Sharp HealthCare Foundation; Dr. Timothy O'Malley, Vice President for University Relations, University of San Diego; Joe Watkins, Vice President of External Relations, Point Loma Nazarene University; Ann Spira Campbell, Deputy Director, San Diego Opera; Kristin Bertell, Associate Vice Chancellor, UC San Diego Health Sciences Development and Carole Fish, CFRE, Principal, Fish and Lewis Consulting*

### 5. Board Development for Membership Organizations **KIPJ 219**

Membership organizations play a special and unique role in our culture, from civic engagement to facilitating collegiality. Keeping them vital and strong takes conscious attention to both membership and board development. Without well-informed and facilitative leadership, membership often drops, creating a downward spiral. What are the right board development strategies? What special considerations does this kind of board development entail? What processes and written materials are necessary? Join us for an interactive presentation about what it takes to keep a membership organization on a positive path. **A**

*Vanessa Oshiro, Grants Officer and Program Associate, Leichtag Foundation; Tinesia Conwright, Founder, DETOUR Empowers; and Alicia Milla, Program Officer for Education and Grants Administrator, International Community Foundation*

### 6. Strategic Alliances, Partnerships, Mergers and Collaboration **KIPJ G**

Learn about the array of formal cross-organizational relationships, when and how to use them and their impact on organizational governance. **E**

*Paul Van Dolah, President, Van Dolah & Associates*

### 7. Nonprofit Strategic Planning for Results **KIPJ 218**

The focus of this informative workshop will be on the benefits of strategic planning for nonprofits, large and small, as well as the kind of results that a strategic plan can yield. Concrete examples as well as a new Association for Strategic Planning study will demonstrate the relationship between strategic planning and organizational success. **A**

*Beth Branning, Chief Strategy Officer, San Diego Zoo Global*

### 8. How to Read a Financial Statement **KIPJ 217**

One of the ten core duties of a board of directors is to ensure that the organization is meeting its fiduciary obligations. A key tool to accomplish that end is being able to read and analyze the organization's financial statements. This seminar will teach you how to make sense of the numbers and what questions to ask. **B**

*Mike Lichtenberger, Shareholder and Nonprofit Practice Leader of Mayer Hoffman McCann; Heather Hernandez, Senior Manager of Mayer Hoffman McCann; and Steve Hermes, Co-founder and Client CFO, Mission Edge San Diego*

## 9. Finance From a Governance Perspective KIPJ 215

The stewardship of tangible assets is a core board responsibility that involves much more than passing a budget and reviewing financial reports. Learn about the full gamut of oversight responsibilities and

how enacting them at a governance level will help you and your organization excel in your field. **A**

*Brian Yacker, CPA, President, YH Advisors*

# 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. The Board and the Community KIPJ G

This mini-lecture takes a look at how to build effective community relationships to promote your cause, respond to your constituency and develop a strong base of support. **A**

*Jessica Robinson, Executive Director, Consensus Organizing Center SDSU School of Social Work and John Hughes, Executive Director, Metro San Diego*

## 2. Connecting the Dots KIPJ I

Boards need to be holistic thinkers to advance their organization's cause. This includes bringing diverse perspectives and experiences to the board table. You can build your cognitive capacity just like you can build your body by learning cognitive stretching techniques. You can bring diverse perspectives into the board room through effective recruiting techniques. Discover and practice some of the most successful, then try them with your board and see what happens over time. You will be pleasantly surprised! **E**

*Elizabeth Castillo, Graduate Research Assistant, USD Department of Leadership Studies*

## 3. Board Tool Kits KIPJ 220A

Every board needs a great governance tool kit. It frees the board up to focus on "the big stuff". But sadly, most organizations don't invest the time and energy to help their boards "get on board" easily. This seminar will show you how to design and create the right governing manual to inspire and inform your board. You will like the results you get! **A**

*Liz Shear, Director of the USD Nonprofit Governance Symposium and Daniel Romero, Director of Education and Training, San Diego Futures Foundation*

## 4. Why Advocacy Advances Your Cause and How to Institutionalize It KIPJ 218

Most of the great social change in the USA was initiated by the nonprofit sector. It is an essential part of our sector's mission. Why should your organization get involved? What are the legal restrictions? How do you become an advocate for your cause? This mini-lecture provides an easy-to-use 10-step framework that will make an advocate out of anyone and any organization. **A**

*Pat Libby, Professor of Practice, Director, USD Nonprofit Institute*

## 5. How to Design and Use an Agenda to Structure Effective Board Decision Making KIPJ 219

Meeting agendas matter. They are one of the key social architecture elements in your organization. How you design and use them will directly affect the quality of your board decision-making. Learn how

to think about, design and use your agenda to get the high quality results your organization needs and deserves. **A**

*Christy Wilson, Executive Director, Rancho Santa Fe Foundation*

## 6. The Board's Role in Organizational Evaluation KIPJ H

The board needs to play a major role in evaluating the organization. From looking at the executive's performance, as well as its own, to clarifying how it enacts its mission, there are many ways a board can add important value. Take an insider's look at how a philanthropic institution clarified its giving philosophy using an evaluative approach. **E**

*Dr. Laura Deitrick, Director, USD Nonprofit Institute, Caster Family Center for Nonprofit and Philanthropic Research and Kathy Patoff, Vice President, Community Outreach/ Foundation Officer, Union Bank*

## 7. Harnessing the Promise of Social Enterprise, Creative Insights from the Field KIPJ EF

Social enterprise is a hot new buzzword. But what does it really mean? This lecture and panel discussion will demystify social enterprise by explaining its major characteristics and legal structures. **A**

*Jenny Jones, Graduate Research Assistant, USD Nonprofit Institute, Caster Family Center for Nonprofit and Philanthropic Research; Svetlana Krasynska, Graduate Research Assistant, USD Nonprofit Institute, Caster Family Center for Nonprofit and Philanthropic Research; Teresa Smith, Co-Founder and CEO, Dreams for Change; and Guinevere Kerstetter, CFO, Jewish Family Service*

## 8. Marketing Matters KIPJ 217

What is the problem with nonprofit marketing? Why don't our strategies get us the support we need? We just might be doing it wrong! When done incorrectly, marketing is a waste of money. When done well, it can make all the difference in meeting and exceeding goals. This interactive session will provide a crash-course on all things marketing, from identifying who to target, how to find them, and what to say when you do in order to generate new levels of support. We'll also cover how to figure out your nonprofit brand, and the best role board members can play in organizational marketing strategies. **E**

*Deirdre Maloney, President, Momentum LLC*

# BUILDING BEST PRACTICES: PROCESSES, FUNCTIONS, AND STRUCTURES

## Schedule for Saturday, January 11, 2014

- 8:30 Opening Remarks  
Paula Cordeiro, Dean, USD School of Leadership and Education Sciences
- 9:00 Armchair Interview "Connecting the Dots, the Social Architecture of Exceptional Governance" a conversation between Dean Paula Cordeiro and Virgil Roberts. Roberts is a long time civic leader who has had a distinguished career in law and the music industry. He serves on an array of nonprofit boards in California including the James Irvine Foundation, the Bridgespan Group, and the Community Foundation Land Trust. He most recently co-founded the African American Board Leadership Institute in Los Angeles.
- 10:15 Concurrent Seminars and Intensives
- 12:00 Lunch with tabletop conversations to harvest lessons learned.  
Hosted by Symposium Director, Liz Shear
- 1:30 Concurrent Seminars and Intensives
- 3:00 Adjourn
- 

## Saturday's Special Intensives

### 1. What Strategic Planning Can Do for Your Organization MRH 145

Join **Carole Fish**, CFRE, Principal of Lewis and Fish Consulting for a seminar for all board and key staff members on the various types of strategic planning, their pros and cons and how to use this key process to build your board.

### 2. Real Estate and Your Nonprofit MRH 147

**Carlee Harmonson**, Regional Director, Union Bank, will moderate an expert panel including **Stephen Breskin**, Vice President and Unit Manager, Union Bank and **Berit Durler**, Trustee, San Diego Zoo Global that will teach **you** how to evaluate whether you should accept real estate gifts, how to think about purchases and how to use them to generate partnerships with the private sector. Bring your questions, issues and problems to solve in this comprehensive intensive.

#### Classroom Locations

MRH = Mother Rosalie Hill Hall

KIPJ = Kroc Institute for Peace and Justice

# Saturday's Seminars

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

### 1. How to Help Your Board “Ensure Adequate Resources” for your Organization **KIPJ 220A**

We often expect our boards to raise money without adequate back up. Besides a good case, excellent prospects and fundraising education, there should be both detailed and accountable planning and excellent resource development systems in place. Learn how one such system produced excellent results for the cause, the organization, the board and the staff. **A**

*Don Stump, Executive Director, Lifeline; Nancy Smith, Co-Owner, Team Smith*

### 2. Are You Prepared for When the IRS Comes Visiting? **KIPJ I**

Executive compensation, safe harbors, pricing for unrelated business income and transfer finances are just a few of the “hot spots” the IRS will be auditing in the next few years. Learn how to prepare for an IRS audit, what you need to document and how to justify expenses with a nationally acclaimed nonprofit tax expert. **A**

*Patricia Jo Mayer, Senior Manager, Tax, Moss Adams LLP*

### 3. Board Evaluation: Assessing Board Decision Making to Improve Future Effectiveness **KIPJ H**

Looking backward to move forward is an emerging strategy in board development. Reviewing the results of past decisions helps a board to function better in the future. Learn how to use this important tool to enhance your board. **E**

*Ron Mitchell, CPA, Partner, AKT*

### 4. To Endow or Not? Where an Endowment Fits in Your Organizational Life Cycle **KIPJ EF**

The goal of this seminar is to explore the different ways organizations decide to build an endowment. What factors do they consider? What additional fiduciary responsibilities do they assume? Join a diverse group of nonprofit leaders including **Merle Brodie** and **Geoff Graham** as they discuss why or why not they decided to focus in that particular direction. **A**

*Facilitated by Linda P. Spuck, CTFA, Vice President, Union Bank with Merle Brodie, CFRE, Gift Planning Officer, Girl Scouts San Diego; Shelly Stuart, Vice President of Development, San Diego Humane Society; and Geoff Graham, CFRE, Director, Planned Giving and Estates, The Scripps Research Institute*

### 5. Beginner's Mind **KIPJ 219**

Returning by popular demand - A special seminar for the board and staff of new organizations that focuses on how to design and develop an appropriate legal and governance system for your organization. **B**

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

### 6. How to be an Excellent Organizational Ambassador **KIPJ 217**

As a passionate, committed leader, you get it. You know why your organization matters. You know why your cause 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. Now is your chance to get others excited, in a way that's comfortable for you. 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. In the end you'll walk away with concrete ideas to generate new excitement for your organization and bring others along who have yet to discover it. **A**

*Deirdre Maloney, President, Momentum LLC*

### 7. Financial Toolkits: Loans, Reserves, Investments and More **KIPJ G**

Fully embracing the stewardship of tangible assets means more than knowing how to read a financial statement. What tools do you have available to make the most of your assets and steer your organization toward an excellent and stable financial position? Learn about the financial toolkit and how to use it. **A**

*Len Sonnenberg, CPA, Major Shareholder, Sonnenberg and Company CPAs; Rollie Munger, CPA, Senior Audit Manager, Sonnenberg and Company CPAs*

### 8. Ensuring Your Future: Tools for Hiring Senior Staff **KIPJ 218**

One of the key nonprofit board responsibilities is hiring the next executive director. With so many baby boomers nearing retirement, this important task has begun to take on a new urgency. Join an experienced search consultant as she guides you through the search process from start to finish for the best possible results. **A**

*Pat Libby, Professor of Practice and Director, USD Nonprofit Institute*

### 9. Conversational Practices that Deepen and Strengthen Governance Decision Making (Morning Only) **KIPJ 215**

Dialogue, inquiry, strategic conversations and more enhance any organization's effectiveness. But, they are particularly important for nonprofit boards, which often operate with limited resources. Learn how you can make the most of your board practice by using the latest organizational development tools. **E**

*Dr. Zachary Green, Professor of Practice, USD School of Leadership and Education Sciences*

## Faculty Biographies

**Kristin Bertell, MA, CFRE**, is the Associate Vice Chancellor for UC San Diego's Health Sciences Development. In this role, she is responsible for all Health Sciences fundraising including clinical, research and academic programs. Prior to UC San Diego, she was Senior Vice President for The Greenwood Company, a consulting firm headquartered in San Francisco. There, Kristin conducted campaign planning and management for such organizations as the Gladstone Institutes, the Buck Institute for Research on Aging, and Scripps Health. She has 23 years of demonstrated success in philanthropy – 10 of them in the San Diego community. Kristin is a graduate of UC Los Angeles and holds a master's degree in communications management from the Annenberg School for Communication and Journalism at the University of Southern California. She is a member of the Association of Fundraising Professionals, the Association of Healthcare Philanthropy and the Southern California Association of Healthcare Development. In 2004, *San Diego Metropolitan* magazine presented Kristin with a 40 Under 40 Award.

**Beth Branning** is the Chief Strategy Officer for San Diego Zoo Global (SDZG). She is responsible for bringing the organization's vision and values to life by developing and overseeing the implementation of strategies that align the organization with its mission. Beth leads SDZG's strategic planning and implementation process by facilitating major strategic and facility-related planning activities. The SDZG strategy planning process was recently the recipient of the 2013 Association for Strategic Planning (ASP) Goodman Award — the top prize for strategic planning innovation and implementation. In addition to the San Diego Zoo and the San Diego Zoo Safari Park, Beth has helped a number of nonprofit organizations and associations to realize their potential by facilitating their strategic planning efforts. This list includes the American Alliance of Museums (AAM), the Association of Zoos and Aquariums (AZA), the Reuben H. Fleet Science Center, the San Diego Japanese Friendship Garden, and the Balboa Park Cultural Partnership. Beth is certified as a Strategic Management Professional by the Association for Strategic Planning.

**Stephen Breskin** is Vice President and Unit Manager at Union Bank. His real estate career spans 35 years, beginning in the United Kingdom with his obtaining a BS in estate management, followed shortly thereafter by the prestigious Royal Institution of Chartered Surveyors designation. In 1989 Stephen moved to Southern California and has been involved in all aspects of the real estate profession, working in the areas of appraisal, property management, acquisitions and commercial brokerage. He joined Union Bank in Los Angeles in 1986 as the Real Estate Sales and Leasing Officer and was promoted shortly thereafter to department manager. Stephen was transferred to San Diego in 1989 to assume the position of manager for the merged Union Bank/California First Bank Trust Real Estate Groups. When Union Bank and The Bank of California merged in 1995, he was appointed as Regional Manager for Southern California and later charged with overseeing the entire Trust Real Estate Management Group, with direct responsibility for offices in Seattle, San Francisco & San Diego. In addition to his membership in the RICS, Stephen holds a California Real Estate Broker's License and the CCIM designation.

**Merle Brodie, MPH, CFRE**, is the Gift Planning Officer at Girl Scouts San Diego. She has been a fund raising executive for over 25 years, specializing in working with donors on major and estate gifts. She has held leadership positions with the Alzheimer's Association, The

San Diego Foundation, Scripps Foundation, Jewish Community Foundation, and Palomar Pomerado Health Foundation. In her consulting practice, her clients included the Arc of San Diego, San Diego Center for Children, Neighborhood Health Centers, North Coast Repertory Theatre, and Heritage Pointe. Merle is Co-President of Women Give San Diego; and serves on the Advisory Board and as faculty of UCSD's Fundraising Certificate Program. Merle is past president of the Association for Fund Raising Professionals (AFP) and recipient of the Development Executive of the Year Award. Merle currently serves on the Board of the Partnership for Philanthropic Planning and is a member of the Estate Planning Council, and the Association of Fund Raising Professionals.

**Ann Spira Campbell** is Deputy General Director of the San Diego Opera. Following graduate studies in communications at UW-Madison, she joined Festivals, Incorporated, serving as the Sponsorship Director for ChicagoFest, the largest music festival in the country at that time. For the past thirty years, Ann 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, Ann 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. 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; Advisory Board Member of Scripps Memorial Hospital La Jolla, and Co-Chair of the Search Committee for the Senior Rabbi of Congregation Beth Israel. A frequent guest speaker on the topic of fundraising in America, Spira Campbell has been a lecturer for The League of American Orchestras, The Association of Fund raising Professionals, and The National Committee



## Faculty Biographies

for Planned Giving. One of her most satisfying posts was as a faculty member at the University of San Diego, teaching Resource Development in the nonprofit leadership and management master's program.

**Mary Ruth Carleton, MA**, is San Diego State University's (SDSU) Vice President for University Relations and Development and CEO of the Campanile Foundation, the university's philanthropic board. Mary Ruth also manages SDSU's government and community relations, marketing and communications, public affairs and alumni relations. Her prior experience includes Assistant Dean of Development for the College of Health and Human Services at SDSU and Vice President for Development at the Scripps Foundation of Medicine and Science. 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. She is also member of the AFP Senior Initiatives Peer Group in San Diego.

**Elizabeth Castillo, MA**, is a USD Department of Leadership Studies Graduate Research Assistant, currently pursuing a PhD. She has more than 21 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. Her research interests include organizational learning in nonprofit agencies, governance, new conceptual approaches to resource development, and collaboration.

**Tinesia Conwright, MA**, is the Workforce Development Specialist and Community Outreach Coordinator at the San Diego Housing Commission. Tinesia earned her bachelor's degree in public administration from San Diego State in 2004. She is currently a licensed Board Certified Coach (BCC) in Professional Development, a San Diego County Foster Parent, a 2011 graduate of LEAD San Diego and a graduate of the USD Nonprofit Leadership and Management master's program. Her organization, Depositing Empowerment Through Outreach & Urban Redevelopment (DETOUR), uplifts, motivates, and inspires women and girls through education, empowerment, and entertainment. Between 2009 and 2011 Tinesia launched My Little Sisters and the F.A.N.C.Y. Teen Girls Expo, DETOUR youth development programs that place emphasis on improving the self-esteem and self-awareness of young women between the ages of 14 and 19. Her goal is to always set an example, be a resource, and constantly support youth during their times of need.

**Paula Cordeiro, EdD**, Dean of the School of Leadership and Education Sciences at the University of San Diego. Previously Paula was the coordinator of the master's and doctoral programs in Educational Leadership at The University of Connecticut. She is a past president of the University Council of Educational Administration (UCEA), and in 1998 was awarded a fellowship by the Commonwealth Council for Educational Administration and Management (FCCEAM). Paula has published three books and recently finished the fourth edition of her co-authored text: *An Introduction to Educational Leadership: A Bridge from Theory to Practice*. Her research is in the areas of school leadership, cross-cultural leadership and international education. She is past President of the San Diego Council on Literacy, a founding member of the Academy of International School Heads, a board member of the International Council for the Education of Teachers (ICET) and a board member of

the Francis Parker School and Keiller Leadership Academy. In February 2006, Governor Schwarzenegger appointed Paula to the California Commission on Teacher Credentialing, and in 2007 she was appointed to the board of the James Irvine Foundation in San Francisco.

**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. Alberto has served as Board President for McAlister Institute, and as a 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.

\***Laura Deitrick, PhD**, is the Director of the Caster Family Center for Nonprofit and Philanthropic Research at the University of San Diego. 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. Currently the Center's work is focused on research, evaluation and understanding of the landscape of California's nonprofit and philanthropic sector in relation to the broader economy. Laura is also a faculty member in the USD nonprofit leadership and management master's program. Laura has lead numerous training sessions on critical nonprofit issues for groups such as the San Diego Association of Nonprofits, the Association for Fundraising Professionals, the Rancho Santa Fe Community Foundation, the Nonprofit Leadership Alliance, San Diego Grantmakers, The San Diego Foundation, and Union Bank. Laura received her bachelor's degree from San Diego State University and her master's and PhD from USD.

**Berit Durler, MBA**, is a consultant, specializing in Charitable Real Estate Gifts. She has more than 20 years' senior management experience in major real estate and construction lending, and more than 10 years' experience in financial and operational management of nonprofit organizations. Berit is a trustee on the Board of San Diego Zoo Global, past chair of San Diego Hospice and a past board member of a number of nonprofits, including the San Diego Foundation, the San Diego Performing Arts League, LEAD San Diego, San Diego Women's Foundation and Goodwill Industries.

**Shane Engel, BA**, currently serves as an evangelist in the San Diego Church of Christ and leads the church in the Mission Valley Region with his wife, Sara. Shane has served 13 years in the ministry and has led ministries in New York, New Jersey and California. He also serves on the board for Urban Surf 4 Kids, a local 501c(3) that provides water based activities for foster / orphan children and teaches them to serve our communities. He graduated from Rutgers University with a BA in history and is currently finishing a master's of leadership and nonprofit management at the University of San Diego.

\* USD Institute for Nonprofit Education and Research faculty

**\*Carole M. Fish, ME**, has spent more than 26 years in the nonprofit sector. After receiving a master's in education from the University of San Diego, she began a career that has spanned several organizations including the American Cancer Society, Scripps Green Hospital, Children's Hospital and Health Center, and the 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, and leadership development. Carole serves on the Association of Fundraising Professionals San Diego Chapter Board where she chairs the Senior Initiative and is a Paul Harris Fellow. She was recently awarded the Outstanding Development Professional Award by the Association of Fundraising Professionals. Carole is also an adjunct faculty member in the USD nonprofit leadership and management master's program.

**Derek Floyd's** professional experience includes work with The Innocent Fund, P.A.W.s, San Diego Performing Arts League, the San Diego Symphony and the Juilliard School of Music. His skills include fundraising, resource development, program management, graphic/web design, and volunteer management. Derek received his bachelor's in music from the Juilliard School and is a master's candidate in the USD nonprofit leadership and management program.

**Geoff Graham, CFRE**, is Director of Planned Giving and Estates at The Scripps Research Institute. Geoff is a dedicated professional whose career has spanned a full spectrum of roles within philanthropy over the last 20 years. Beginning with Scripps Foundation he has gained a broad range of experiences with annual and planned giving, major gifts, stewardship, management, special events, gift policy and processing, strategic and campaign planning all contributing to his strong, in-depth understanding of philanthropy and an ability to lead others effectively. Geoff has held memberships in the Association of Fundraising Professionals (AFP), Partnership for Philanthropic Planning (formerly NCPG), and Council for Advancement and Support of Education. He has served in leadership roles within the community that include positions as a committee member, board of director, officer and chair. The Association of Fundraising Professionals recently honored him as the 2013 Outstanding Development Professional.

**\*Zachary Green, PhD**, is a visiting professor in the USD 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 through the World Bank. His teaching and research focuses on group behavior, human development, identity, dialogue, and negotiations. Increasingly Zachary's work as Associate Director of the Department of Leadership Studies' Leadership Institute has focused on issues of mindfulness, consciousness, reflective practice, and social justice action. His specialty is the development of "next generation" leaders and advocates, especially those with rough edges and unbridled passion.

**Carlee Harmonson, CRSP**, is Regional Director of Trust and Estate Services at Union Bank. Carlee works with a team of specialists in wealth planning, investments, risk management, fiduciary services, and banking in the San Diego, La Jolla, Rancho Mirage, and Irvine Trust offices. She leads a team of specialists who manage a wide

range of trust and estate matters in accordance with sound fiduciary principles. Carlee has been with Union Bank since 2002. She is a veteran of the trust business and has over 25 years of experience in both Personal Trust and Employee Benefit Plans. She was formerly with First National Bank for over five years. Carlee is a graduate of the University of California at Davis, where she earned her bachelor of arts degree in sociology. She serves the community in many capacities including as a member of the Rady Children's Hospital Foundation Board of Trustees, chair of the Trusts and Estates Committee for the Rady Children's Hospital Foundation, member of the Board of Casa Cornelia Law Center, past Chairman of the Board of the American Lung Association, and co-founder of the Scripps Ranch High School Girls Athletics Parent Booster Club. Union Bank is a sponsor of this event.

**Steve Hermes, CPA, MBA**, is Co-Founder and Client CFO at Mission Edge San Diego. He brings 30 years of accounting experience to client engagements. Steve was a founding member of Nation Smith Hermes Diamond, a public accounting firm in San Diego, where he spent 23 years, finishing his career in Audit and Attest services. Steve teaches Auditing and Managerial Accounting courses for UCSD Extension, and is Treasurer of the Sustainable Surplus Exchange board.

**Heather Hernandez, CPA**, is a Senior Manager in the Attest Services Group of Mayer Hoffman McCann P.C. She has more than 10 years of public accounting experience. Heather has completed both financial and internal control audits in a variety of industries including nonprofit, manufacturing, distribution and professional service firms. Heather is an active member of the San Diego Not-For-Profit Practice Group where she works with her clients strategically to strengthen internal controls and procedures. Her experience also includes auditing in accordance with OMB Circular A-133 for not-for-profit organizations, as well as commercial companies that received Federal funding that require program specific audits under government auditing standards. Heather is a member of the California Society of CPAs, American Institute of Certified Public Accountants, and Young Nonprofit Professionals Network (YNPN) of San Diego. She is also an active participant in the CBIZ Women's Advantage Program working to mentor the young women in the office. CBIZ Mayer Hoffman McCann PC. is a sponsor of this event.

**Christine Houston, MA**, is a Legal Analyst at Neighborhood House Association where she specializes in employee relations, complaints, policy and procedure development and pre-litigation work. She has served as board secretary/treasurer of CHN: Cornerstone Connection. Christine received her bachelor's in history from Loyola Marymount and her paralegal certificate from USD. She is a graduate of the USD nonprofit leadership and management master's program.

**Reverend John Hughes, MSW**, is CEO of United Methodist Urban Ministries, a faith based organization that focuses on poverty. In the last 15 years, under his leadership, Metro has grown from 3 to 14 employees and from 3 to 12 sites in three states. In 2013, Metro served 51,000 low-income individuals. John also co-founded the Faith Based Leadership Training Institute at San Diego State University that has trained over 100 pastors from 18 denominations how to connect their church to communities in practical ways. John's prior work includes CEO of an international relief organization and Associate, Executive and Senior pastor for several small and large congregations. He is a member of the County of San Diego Social Service Advisory Board, a member of the Juvenile Justice Coordinating Council and a

## Faculty Biographies

founding member of the San Diego Interfaith Disaster Coalition. He is the creator of a model of community development – Church Based Community Development - that provides a conceptual and practical framework for churches to play multiple roles in their community. John is also a member of the USD Institute for Nonprofit Education and Research Advisory Board.

**Nancy Jamison, BA**, has served as Executive Director of San Diego Grantmakers (SDG) since 2005. During her tenure, the organization has grown in size and prominence in both local and national philanthropic communities. Nancy has overseen the launch and expansion of many SDG initiatives including successful funder collaborations; public policy efforts such as the San Diego Giving Stories project; work addressing the economy and diversity in grantmaking; and reports on organized giving in our region. Previously, Nancy was a Senior Consultant for TrustWorks Group, a leading San Diego organizational development firm, providing strategic planning, leadership and team development for nonprofits, associations and corporations. She is also the co-author of the TrustWorks series of training products on how to build trust in the workplace. She has served as a volunteer and board member with several nonprofit organizations. Nancy was recently named to the board of the national Forum of Regional Associations of Grantmakers, where she previously served on the Strategic Planning Committee. In 2010 she was on the planning committee for the Council on Foundations national Family Philanthropy Conference. Nancy has a BA in psychology from Stanford University.

**\*Jennifer Amanda Jones, MA**, is a Graduate Research Assistant at the Caster Family Center for Nonprofit and Philanthropic Research where she is pursuing a PhD in leadership studies. She has been active in the San Diego nonprofit community for more than a decade, working and volunteering for organizations with annual budgets ranging from less than \$100K to more than \$31M. Jennifer holds bachelor's degree in global economics from UC Santa Cruz and a master's in nonprofit leadership and management from USD. She has a background in four languages, and has worked with nonprofits in Brazil, the Dominican Republic, Haiti, Peru, and throughout San Diego. Jennifer has served on the board of the San Diego Human Dignity Foundation, the third largest LGBT focused community foundation in the United States. She 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). Her experience includes program design and implementation, fundraising, board development, marketing and community relations, social media, media relations, and strategic planning. Jennifer's nonprofit resource blog can be found at <http://jenniferamandajones.com>.

**William Jones, MBA**, is the President and CEO of CityLink Investment Corporation, a commercial real estate, investment and management firm. Prior to starting CityLink, William served as General Manager/Senior Asset Manager and Investment Manager with certain real estate subsidiaries of Prudential. Before joining Prudential, William served 15 years in municipal government as a San Diego City Council member, Deputy Mayor and Chief of Staff. He currently serves as Director of SEMPRA Energy and Director of certain American Mutual Funds managed by Capital Research and Management Company. William is a former Director of the Federal Reserve Bank of San Francisco and former Chairman of the Federal Reserve Los Angeles Branch Board. William is Chairman of

the Board of Trustees of Francis Parker School where he has been a board member since 2005. He has also served as Director of the San Diego Padres Baseball Club, trustee of the University of San Diego, and was the founder of the Project I Believe Scholarship Program. William received his MBA from Harvard Business School and a BA in economics from USD.

**Marjory Kaplan** is President and Chief Executive Officer and Miriam and Jerome Katzin Presidential Chair of the Jewish Community Foundation San Diego (JCFSD), where she has served since 1994. During her time at the JCFSD Marjory transformed a relatively small organization into a regionally and nationally recognized philanthropic leader. Under her guidance, more than \$700 million in grants have been awarded for education, healthcare, the arts and social services in both the Jewish and general community. For the last seven years, the Foundation has been the top grant maker in the county. Through 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. Before serving in her current role, Marjory was a Director of Development at the Scripps Foundation for Medicine and Science, La Jolla. The Jewish Community Foundation San Diego is a sponsor of Friday's event.

**Guinevere Kerstetter, CPA, CGMA**, is CFO of Jewish Family Services. She has more than 30 years of experience in the field of accounting, specifically in senior management positions in the nonprofit human services area and in the for-profit arena in both private and publicly traded corporations. The San Diego Business Journal recently named Guinevere the 2013 CFO of the Year for medium nonprofit organizations. Guinevere graduated Summa Cum Laude and first in the School of Business from West Chester University. She is a member of the American Institute of Certified Public Accountants and the Nebraska Society of Certified Public Accountants. She has also served as a director for various nonprofit organizations.

**Svetlana Krasynska, MA**, has been serving local, national, and international nonprofits for the past 12 years. While working in the field of international business law, Svetlana was engaged on a pro bono basis with nonprofits on cases involving international exchange, humanitarian aid, adoption and the arts. In 2002 she left the business arena to dedicate herself to the nonprofit sector on a full-time basis. For the last six years, Svetlana has been working as a management consultant assisting humanitarian, environmental and arts nonprofits, as well as governmental institutions, through her agency, 501(c)(3) Consulting. Svetlana holds a master's degree in nonprofit leadership and management from the University of San Diego. She is currently pursuing a PhD in leadership studies with a nonprofit/philanthropic leadership and management specialization at USD. Born and raised in the Ukraine, Svetlana is fluent in English, Ukrainian and Russian.

**\*Pat Libby, MS**, is a Professor of Practice, creator and Director of the Institute for Nonprofit Education and Research at the University of San Diego. A Boston native, she has worked as a CEO, board member, and consultant to numerous nonprofits since 1978. Her last executive management position was as President/CEO of the Massachusetts Association of Community Development Corporations which she developed into a nationally recognized organization responsible for leveraging hundreds of millions of dollars in public and private investment for CDCs. She has taught courses in nonprofit management

at the Massachusetts Institute of Technology, UC San Diego and San Diego State University. Pat's academic interests are focused on nonprofit advocacy, and applied learning models for graduate degree programs. She holds a master's degree in urban planning from MIT. Pat is the author of *The Lobbying Strategy Handbook*.

**Mike Lichtenberger, CPA**, is a Shareholder and Nonprofit Practice Leader of Mayer Hoffman McCann P.C. He is a former chair of the MHM review of financial statements, internal controls, and business consulting for public and private companies, employee benefit plans and nonprofit organizations. His employee benefit plan experience includes a risk based audit approach for 401(k), 11-K, 403B, defined benefit and health and welfare plans. Mike 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 and on the Audit and Investment Committees of Arc San Diego and the Board of Directors of Arc Foundation. Mayer Hoffman McCann P.C./CBIZ MHM, LLC. is a sponsor of this event.

**Bill Littlejohn, BA**, 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. Bill is a 1980 graduate of the University of Virginia with a bachelor of arts in economics. From 1983 to 1992, he served as Director of Development for the American Cancer Society in Los Angeles and as Director of Direct Marketing for its California division. Later, as Assistant Vice President, he managed fundraising, marketing, finance and fundraising information systems for 15 offices in Southern California. Bill is currently 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. Mary is the Chair of the USD Kaleidoscope Award committee and a faculty member teaching in the nonprofit leadership and management master's program.

**Andy Maffia, CPA**, a Senior Manager at AKT serves as one of the lead auditors for their nonprofit group. AKT is one of the top 100 firms in the U.S. 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 a sponsor of this event.

**Deirdre Maloney** is a published author, national speaker and proud president of Momentum LLC, which helps organizations exceed their goals, and helps their leaders sleep better at night. Through presentations and corporate trainings, as well as customized services like strategic planning, board development and marketing services, Deirdre helps people get things done. She gained much of her experience while serving as the executive director of a multi-million dollar organization in Denver, running her own company, and sitting on numerous boards/committees. Deirdre has used her brand of "mild audacity" to speak on leadership and communication around the country, presenting keynotes, workshops and panel discussions. Her first book, *The Mission Myth*, is a SD Book Award winner, was released in November 2011. Her powerful mini-book, *Tough Truths*, came out in October 2012. Her popular blog on all things leadership – a regular feature in the Huffington Post - is a hit with anyone who likes a direct, authentic style with their morning coffee.

**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. Patricia is Moss Adams' Southern California regional nonprofit tax expert and quality control tax reviewer for nonprofit audit reports. She also serves on Moss Adams' Not-for-Profit Tax Committee. In this role, Patricia has taught several nonprofit tax-related seminars to firm wide tax professionals through Web-X and live seminars. She has also been an instructor for the Salk Institute's Tax Seminar on Private Foundations, Council on Foundation's 2011 Fall Conference for Community Foundations, Strafford Publishing Inc., and the National Business Institute. 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 sponsor of this event.

**Alicia Milla, BA**, is the Program Officer for Education, Arts & Culture, and Grants Administrator at the International Community Foundation. Prior to coming to San Diego, she was the Executive Director of Mount Pleasant Main Street, WDC, and for 17 years was associated with Youth for Understanding de Mexico, where she served as Executive Director. Alicia is a masters' candidate in the USD nonprofit leadership and management program. She received her BA in modern English language and literature from the Universidad Nacional Autónoma de México.

**Ron Mitchell, CPA**, is a Partner at AKT, specializing 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 the 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 sponsor of this event.

## Faculty Biographies

**Rollie Munger, CPA**, is a Senior Audit Manager at Sonnenberg and Company, CPAs. He has 19 years experience serving in the governmental and not-for-profit sectors. Rollie's current clients include cities, water and special districts, as well as not-for-profit clients. He has extensive experience with governmental reporting in addition to OMB Circulars A-133 and A-122. He also assists with firm-wide trainings on technical topics. Sonnenberg and Company is a sponsor of this event.

**Tim O'Malley, PhD**, is the University of San Diego's Vice-President for University Relations. He has spent over 36 years in education as an instructor, administrator, and advocate. Tim began his career in 1973 as an English teacher at the high school and community college levels, before joining the fundraising staff at the University of Portland in 1983. After directing the development office there for more than eight years, he was recruited by Washington State University to head the development office in the College of Engineering and Architecture, and was eventually appointed Vice-President and Director of Gift Planning at the WSU Foundation. In 1997 he was named Vice-President for University Relations at Pacific University in Forest Grove, Oregon, where he oversaw all development, alumni, and public affairs operations for the university. He has served on numerous boards and committees in the nonprofit sector, including the Council for Advancement and Support of Education; Burn Institute of San Diego; and Pullman Memorial Hospital. 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 the County of San Diego's Public Health Champion Award, San Diego's Best Places to Work Award, 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. Prior to 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, and the YMCA Board of Directors.

**Cynthia Olmstead, BA**, founded the TrustWorks Group, Inc. and served as its president until 2010 when it was purchased by the Ken Blanchard Companies. Cindy's new book *Trust Works: Four Keys to Building Lasting Relationships*, written in collaboration with Ken Blanchard and Martha Lawrence, is based on her over 30 year's of organizational change, training and development work. She is a native San Diegan, who has been actively involved in civic and charitable affairs including being a charter member and chair of the San Diego Women's Foundation. Cindy was also a Salvation Army TWIN honoree and longtime member of the Downtown Rotary. She holds a BA in sociology from Pomona College and has recently started Olmstead Management Consulting.

**Vanessa Oshiro, MA**, is the Grants Officer and Program Associate for the Leichtag Foundation. She oversees grant processes from concept to award including preliminary reviews of letters of inquiry and monitoring grant progress. Vanessa's experience in philanthropy includes serving as Grants Manager at The San Diego Foundation where she managed donor-advised funds and grantmaking. She holds a bachelor's in economics from the University of California, Irvine and a master's in nonprofit leadership and management from the University of San Diego. Vanessa is Chair for the San Diego Chapter of Emerging Practitioners in Philanthropy and Treasurer of the Kiwanis Club of Southeastern San Diego.

**Kathy Patoff, MPA**, is the Vice President Community Outreach/Foundation Officer in the Corporate Social Responsibility Group at Union Bank. She is responsible for management of community outreach and charitable contributions in San Diego, Riverside, San Bernardino and Riverside Counties. Kathy has been involved in community development for the past 18 years – with experience in the public, private, and nonprofit sectors. Past experience includes: Chief of Staff, San Diego Workforce Partnership; Community Relations Director/Government Liaison, The Children's Initiative; Assistant to the Mayor for Policy Development, Former San Diego Mayor Susan Golding; and Senior Production Editor at Harcourt Brace & Co. (Academic Press, Inc.). She is a member of the University of San Diego's Institute for Nonprofit Education and Research Advisory Board and the San Diego City-County Reinvestment Task Force. Kathy received her BA in economics from Pomona College, and master's of public administration from San Diego State University. She is also a graduate of the Pacific Coast Banking School. Union Bank is a sponsor of this event.

**Kathy Purdon** is the Board Governance Chair of the Francis Parker School Board of Trustees. She has an extensive background in finance and banking, serving as Controller within the Chase Manhattan Mortgage Corporation for ten years and as a Regional Vice President of J. P. Morgan Chase's Mortgage Banking division in Southern California for 17 years. Kathy managed multiple divisions and operations including finance, sales, human resources, operations and compliance within the financial services sector. She has served on Francis Parker's Board of Trustees for the past four years, chairing the Board Governance Committee since 2011, as well as being a member of the Finance Committee from 2009 to present. She is also a member of the Compensation and Executive Committees. Kathy served on the Parents' Association Executive Board as the Lower School Vice President for two years and on multiple Search Committees for Francis Parker.

**Virgil Roberts, JD**, is a Managing Partner and founder of the law firm Bobbitt & Roberts, which specializes in representing entertainment industry clients in television, film and music. Prior to this, Roberts was the President of Solar Records, one of the most successful African American-owned record companies in the 1980s. His early work as a civil rights attorney with Manning & Roberts included representing the NAACP in the Los Angeles school desegregation case *Crawford v. Board of Education*. He currently serves on the boards of Community Build, the Alliance of Artists and Record Companies, Southern California Public Radio, The Bridgespan Group, Community Foundation Trust Land and the Alliance for College Ready Public Schools. While he was board chair of the Los Angeles Annenberg Metropolitan Project, the organization raised and spent more than

\$120 million to reform public education in the Los Angeles basin. He recently was awarded the Lifetime Achievement Award from the 100 Black Men of Los Angeles and has been honored by the Los Angeles Urban League, the NAACP Legal Defense and Education Fund, the University of Southern California's School of Education, and the UCLA Black Alumni Association. Roberts holds a bachelor's degree from UCLA and a Juris Doctor degree from Harvard Law School, where he was a Felix Frankfurter Scholar. He is a founder and president of the board of the African American Board Leadership Institute (AABLI).

**\*Jessica Robinson, MSW** is the Executive Director of the Consensus Organizing Project at SDSU where she is also a lecturer in the School of Social Work. In addition to her work at SDSU, Jessica is an adjunct 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, Jessica earned both her bachelor's degree in social work and master's in administrative social work from San Diego State University.

**Daniel Romero, BA**, is Director of Education and Training at San Diego Futures Foundation where he develops and manages IT literacy programs. Throughout his life he has worked to build youth and adult educational and vocational training programs, youth participation and development programs and community empowerment programs. Prior to his work at First Futures Foundation, Daniel was community-building coordinator with Community Housing Works and at LISC San Diego. He has a BA from University of California at Santa Barbara and is a masters' candidate in the University of San Diego's nonprofit leadership and management program.

**Elsa Romero, CPA**, an Audit Partner at AKT, leads the public sector and nonprofit group. Elsa provides consulting and tax services to a variety of clients from small to medium size business, specializing in a variety of nonprofit related issues including Unrelated Business Income Tax (UBI). 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. She has served on various nonprofit boards throughout her public accounting career and participates frequently as a speaker for tax compliance and planning for nonprofit organizations. Elsa graduated from San Diego State University with a BS degree in business administration with an emphasis in accounting. She is the Vice President of Finance and Revenue Enhancement for SDSU's 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 and Spanish. AKT is a sponsor of this event.

**\*Patti Saraniero, EdD**, is principal of Moxie Research, an independent program evaluation firm that collaborates with arts organizations, nonprofits and school districts. She is also a lecturer at the University of California, San Diego, as well as in the University of

San Diego's nonprofit leadership and management master's program. Her research and evaluation interests focus on arts education, gifted education and ethics. Previously, she directed the education programs at La Jolla Playhouse and the Old Globe Theatre and worked as a stage manager at a number of regional theatres around the country.

**Todd R. Schulz**, 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 the Director of Marketing and Public Relations through 1994. In December of that year, he became the Director of Marketing and Public Relations at the San Diego Opera and in 2001 moved to the Los Angeles Opera as the 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 the 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 in 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 University of San Diego's Nonprofit Governance Symposium and faculty member in both the USD nonprofit leadership and management master's program and the nonprofit management certificate program.

**Laura Farmer Sherman** is the Executive Director of Susan G. Komen for the Cure in San Diego County. She began volunteering for the San Diego affiliate in 2004, one year after she was diagnosed with breast cancer. In 2007, Laura was named Executive Director. As a 9-year breast cancer survivor and a former corporate communications executive, Laura is passionate about Komen's mission: empowering women, ensuring quality care for all and energizing science to find the cures. She is most proud of the relationships she has developed in the community, bringing a wide range of partners together to help fund support for research – and to help those women and men in our county who are literally choosing between whether they can put food on the table, or pay for a life-saving mammogram.

**Nancy Smith, MSW**, Teamsmith, has thirty years of experience working in the nonprofit sector providing technical assistance expertise in program, organizational and resource development as well as program evaluation. With a broad base of experience including the directorship of several nation-wide technical assistance projects, the Chief Executive Officer of a residential youth employment training center and co-owner of Teamsmith, she has worked with a wide variety of organizations to strengthen their capacity in strategic

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planning, board and staff leadership, and resource development. As part of this effort, she has authored thousands of winning federal, state, and local public and private sector grant applications and worked with a collaboration of corporate and foundation funders to support resident-led efforts in community revitalization. Additionally, she has authored a variety of strategic policy publications for the state and federal government including several program documentation and evaluation reports on model programs.

**Teresa Smith, PhD**, founded Dreams for Change, a nonprofit, in 2009 to provide homeless and asset building services through innovative programming and research. Through her experiences, Teresa saw the need for promoting a new generation of ideas, institutions and business practices to meet a new set of social challenges. Her first two major undertakings were the Safe Parking Program for homeless living in their vehicle and FRESH, a mobile food truck providing meals and workforce development for the homeless. She is a leader building collaborations to address the communities increased needs with reduced resources. Teresa has been the lead in providing pilot programming focusing on building individual and family assets through education and direct advocacy. Teresa is currently working towards completing a master's in nonprofit leadership and management at the University of San Diego. Teresa also served eight years in the US Army Reserve coordinating mental health services.

**Leonard Sonnenberg, CPA**, is the Managing Shareholder of Sonnenberg and Company, CPAs. As the Managing Shareholder of San Diego's largest CPA firm specializing in Homeowners Associations, Leonard has over 40 years in public accounting. He supervises all client engagements from the planning and proposal stage through review and signing of all audits, reviews, reserve studies, and tax returns. He has served as lecturer at state and local conferences and published numerous articles on HOA audits, accounting, and tax issues. In addition, he has served as Treasurer and board member for Community Associations Institute, Clairemont Friendship Senior Center, San Diego Jaguar Club, National Masters Racquetball Association, and San Diego Racquetball Association. As an experienced CPA, Leonard is an approved AICPA Peer Reviewer, conducting Peer Reviews of other CPA firms' professional practices and auditing procedures. Sonnenberg and Company is a sponsor of this event.

**Linda P. Spuck, CTFA**, is Vice President Vice President at Union Bank in San Diego in downtown San Diego. Prior to joining Union Bank in early 2004, Linda served in leadership positions in several nonprofit organizations, including Director of Development for the San Diego Rescue Mission and the San Diego Historical Society. Her background in nonprofit development helps her to serve The Private Bank's nonprofit clients. Linda is a graduate of Occidental College, Los Angeles, where she earned her BA in music. Linda graduated in 2001 from the National Planned Giving Institute, studying under legendary planned giving pioneer Robert F. Sharpe. In addition, she is a graduate of Leadership Lancaster, a program similar to (and affiliated with) Lead San Diego, as well as the Riordan Volunteer Leadership Development Program in Los Angeles. Linda is active in both local and national community service organizations such as Friends of Balboa Park, San Diego Grantmakers, the University of San Diego School of Leadership and Education Sciences' Dean's advisory board, the Girl Scouts San Diego board development committee, and Voices for Children's governance committee. Union Bank is a sponsor of this event.

**Shelly Stuart, CFRE, CSPG, CAWA**, Vice President of Development, 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. Prior to joining the San Diego Humane Society and SPCA, she served as the Director of Development at Helen Woodward Animal Center in Rancho Santa Fe, CA. Shelly has served on the boards of the San Diego Chapters of the Association of Fundraising Professionals and the Planned Giving Round Table. 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 Stump, MA**, brings over 26 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, Don's accomplishments at Lifeline include leading the organization through a strategic planning and re-branding process and expanding sources of support to the organization. Prior to his appointment, Don worked with The Preuss School UCSD and San Diego Youth and Community Services as the Associate Director of Operations and Resource Development. Don currently serves as a member of USD's Kaleidoscope Award for Exceptional Governance committee. He holds a bachelor of arts in psychology and anthropology from Texas Tech University and a master of arts in counseling psychology from Boston College and a postgraduate certificate in chemical dependency treatment from Boston University. Don 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.

**Kyra Tyson, MA**, moved to California in 2000 to pursue an undergraduate degree in business administration at the University of San Diego. The majority of Kyra's nonprofit professional experience comes from her work in development and fundraising for the United Way of San Diego County. In August of 2012, Kyra received her master's in nonprofit leadership and management from the University of San Diego. Shortly after graduating from USD, Kyra relocated to Los Angeles where she is currently working as an Account Executive at the United Way of Greater Los Angeles. The mission of the United Way of Greater Los Angeles is to create pathways out of poverty.

**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 the 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. Paul currently serves as a member of USD's Kaleidoscope Award for Exceptional Governance committee.

**Joe Watkins, PhD**, is the 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. As a consultant to outside organizations, Joe's passion is transforming existing organizations into high performing organizations through leadership development, improved organizational culture, and strategic initiatives. 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. As an ordained minister in the Church of the Nazarene, he served in ministry roles in three congregations over a span of 23 years.

**\*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. Her notable accomplishments include creating the Foundation's Armed Forces Interest Group (AFIG) which raises awareness of the needs of the military in San Diego County and provides financial support for those needs and BetterTogether which is focused on building a collaboration of local private and family foundations that share the commitment and passion to address regional and community needs. 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 also 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 master's in nonprofit leadership and management from the University of San Diego. Rancho Santa Fe Foundation is a sponsor of this event.

**Brian Yacker, CPA/JD**, is President at YH Advisors with almost 20 years of tax, legal, and accounting experience in the exempt organizations area. Brian focuses exclusively on work with exempt organizations which include public support test calculations and planning, governance best practices consultation, recommendations regarding effective Bylaws, compliance with the 501(h) lobbying safe harbor, maximizing charity watchdog ratings and the proper internal and external reporting of special event fundraisers. Representative clients include hospitals and other healthcare organizations, universities and colleges, private foundations, trade organizations, social clubs, other public charities, youth organizations, religious organizations, and amateur sports organizations. Brian is actively involved in the AAA-CPA, serving on their Board of Directors,

Finance Committee and their IRS Liaison Committee, a member of the American Bar Association and a member of the AICPA's EO Tax Technical Resource Committee. Additionally, Brian serves on the Board of Directors as an Executive Committee member for BookEnds, a nonprofit organization. Brian earned his bachelor's degree in finance/marketing from the University of Virginia and his Juris Doctor from the Indiana University School of Law.

**Kevin Yaley, MA**, was officially named the 12th Head of Francis Parker School in 2010. Previously he served as the school's Associate Head of School for five years. Prior to that, he served as Francis Parker's, Director of Admissions for one year and also taught history, ethics and philosophy. Before his decade with Francis Parker School, Kevin taught for ten years at the University of San Diego High School. In addition to his extensive teaching and administrative background, he is regarded as one of the most successful high school soccer coaches in San Diego history, having led his teams to six CIF championships. Kevin received his BA and MA in theology from the University of Notre Dame and his MEd in educational leadership from San Diego State University. Kevin received the Excellence in Teaching Award from the University of San Diego High School in 2001, and participated in the Independent Schools Institute at the Harvard Graduate School of Education. He was a Fellow at the National Association of Independent Schools (NAIS) Edward E. Ford Fellowship for Aspiring Heads. Kevin is currently a board member of the prestigious California Association of Independent Schools (CAIS) Board of Standards.

**Nancy Young, CPA, CISA, CFE** is Senior Manager in the Business Assurance Services Group at Moss Adams LLP. She is responsible for managing audits and fraud investigations. Previously, Nancy worked for the Oregon Secretary of State's Audits Division as an Audit Manager. During her 10-year tenure she managed a fraud, waste and abuse hotline and a fraud investigation team. Nancy has conducted fraud investigation work in various industry groups such as auto dealerships, finance, health care, manufacturing and distribution, nonprofits, higher education and state, local tribal and special purpose governments. She co-authored a 2010 guide on fraud in dealerships and is a frequent speaker on the subject. Nancy is also an adjunct professor at Portland State University teaching Forensic and Investigative Accounting. Moss Adams LLP is a sponsor of this event.



**INSTITUTE FOR NONPROFIT EDUCATION AND RESEARCH**  
5998 Alcalá Park  
San Diego, CA 92110-2492

Thursday, January 16, 2014

**Upcoming Events:**

**Prospective Student Information Session**

*Naval Training Center — 2508 Historic Decatur Rd.*

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 — 86% of our graduates have received promotions or new jobs after graduation!

Saturday, February 8, 2014

**School of Leadership and Education Sciences Spring Open House 2014**

*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.

January 9 – 10, 2015

**Please mark your calendars for the 11th Annual Nonprofit Governance Symposium.**

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