

University of San Diego's
Eleventh Annual Nonprofit Governance Symposium



CommonSense Governance

FRIDAY – SATURDAY, JANUARY 9 – 10, 2015
 PRE-SYMPOSIUM WORKSHOPS THURSDAY, JANUARY 8, 2015

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



Friday Breakfast



Friday Lunch



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Thursday

January 8, 2015

Pre-Symposium Workshops
**Separate Registration
Required**

Pre-Symposium workshops are
designed for board and staff
teams.

12:00 – 5:00 p.m.

The Kaleidoscope of Governance Tour with *San Diego Youth Symphony and Conservatory board chair Mark Bennett, immediate past chair Robert Gaan and president and CEO Dalouge Smith; Francis Parker School head of school Kevin Yaley with Liz Shear, tour guide.*

See governance as leadership at work as we visit two extraordinary Kaleidoscope for Exceptional Governance winners, San Diego Youth Symphony and Conservatory and Francis Parker School, for an in-depth conversation with their board and staff leadership.

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

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

4:00 – 7:00 p.m.

Late afternoon workshops in Mother Rosalie Hill Hall

Room 131

How Trust Works to Build and Sustain Exceptional Governance

Cindy Olmstead, owner, Cindy Olmstead Consulting and co-author of Trust Works: Four Keys to Building Lasting Relationships

This working session will identify four core elements of trust and the behaviors that boards and staff utilize to enhance positive results, good communication and effective working relationships. Each leadership team will have the opportunity to assess its trust behaviors, identify where they are strong as well as areas that need improvement. Teams will leave with an increased awareness of their trust quotients plus a game plan for continuation of their trust building to achieve exceptional governance.

Room 133

The Insider's Guide to Succession Planning and Executive Search

Pat Libby, professor of practice and director, USD Nonprofit Institute and Jane Rheinheimer, Rheinheimer Smigliani + Drake, APC; USD faculty

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

Room 135

Marketing Basics: Create Your Plan, Create Your Pitch

Deirdre Maloney, president, Momentum LLC

There's a reason that so many nonprofits find marketing to be such a struggle, one that drains time, energy and money — and leads to little success. It's because they're doing it wrong. When done correctly, marketing is a powerful tool, one that draws a targeted audience to your organization, convinces them to support it, and gets them to get others to do the same. Participants in this workshop will walk away with the customized marketing tool-kit needed to provide support and success for the coming year and beyond.



- 8:00 a.m. Registration, breakfast and networking
- 8:30 Welcome | **Janine Mason** and **Tony Hsu**, co-chairs, USD Nonprofit Institute Advisory Board
- 8:50 Presentation of 2015 Kaleidoscope Award for Exceptional Governance and panel discussion **Dr. Mary McDonald**, chair, Kaleidoscope Award Committee
- 10:00 Orientation to the Symposium
Liz Shear, director, USD Governance Symposium
- 10:10 Break
- 10:25 - 12:00 p.m. Workshops: Choose from the following ten workshops.



FIRST FLOOR

B=beginners,
I=intermediate,
A=advanced.
Unlabeled
workshops are
suitable for all.

Rooms EF

Inside the 2014 Kaleidoscope Award Winner Boardroom: Voices for Children (VFC)
David Bialis, board chair; senior vice president, Cox Communications; *Rochelle Bold*, immediate past chair; vice president, Altearis Clearing Sol; *Anthony Farwell*, executive chairman & founder, GovX, Inc.; *Sharon Lawrence, Esq.*, president/ CEO, VFC; and *Janine Mason*, Kaleidoscope Award Committee; co-chair, USD Nonprofit Institute Advisory Board; executive director, Fieldstone Foundation

While their mission has always guided their work, Voices for Children’s board and key staff took an enormous leap forward in 2006 when they decided to “Serve Every Child” by 2016. Despite retrenchment due to the economic recession in 2008, Voices for Children’s leadership made brave and tough choices to restructure the board and staff to make “Serving Every Child” real. This involved setting an ambitious fundraising goal and creating a more direct philanthropic role for the board. By 2013 they had doubled their annual giving and are now well on their way to “Serving Every Child.” Join a free-ranging conversation with Voices for Children leadership as they share their governance journey.

Room G

Four Attributes of High Performing Organizations (I)
Mark Steranka, director, Moss Adams

You have invested significant time and resources to build a talented team of leaders, but how do you retain them for the long term and keep them focused on driving high performance, promoting your unique culture and setting an example for others in your organization? Learn how a focus on the four attributes of high-performing organizations can help your organization improve performance in the short term and sustain it over the long term.

SECOND FLOOR

Room 215

Common Sense Strategy for Boards to Engage in Resource Development
Nancy Smith, Team Smith and *Don Stump*, executive director, North County Lifeline

Creating a “resource full” organization with engaged board members requires a commitment to a systematic approach that involves an annual assessment of organizational capacity and determines resource development needs. Explore how to engage board members in the creation and implementation of an annual written plan that provides them with the knowledge and tools to be successful ambassadors and fundraisers for the organization to achieve revenue goals.

Room 217

Managing the Board (B)
Alberto Cortes, executive director, Mama’s Kitchen

The relationship between a chief executive and the board of directors is a dance; one that requires focus, skill and attention to the rhythm, executed with grace and professionalism. Together, we will learn the basic steps that create such a dance: who leads, who follows, timing and how to improvise in this subtle partnership between the board president and the executive director. By the end of this workshop, you will be ready to dance with style.

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Room 218

Making Mergers Work for Your Organization (A)

Paul Van Dolah, president, Van Dolah & Associates, Inc.

Mergers can be the most logical move for organizations to make in these times of increasingly restricted resources and pressures to grow the overall impact and effectiveness within the broader community. Mergers, however, are not without peril. Before starting down the road to a merger, it is wise to be well informed of the keys to making them work. This workshop will cover the forms that mergers can take, the keys to success and lessons learned from the field when mergers don't work.

Room 219

Sustaining Board Membership: One and Done vs. the Long Term

Sue Carter Kahl, president, SMCK Consulting

Very rarely do individuals serve only one organization, yet we often think of current board members as 'ours'. Join us as we explore the notion of board members as resources that are part of our community's commons. Are we 'using up' board members or contributing to a renewable cycle that prepares them for future service in other roles and organizations? What would a community strategy look like to cultivate and sustain this community resource?

Room 220

Conversational Practices to Manage Conflict (I)

Zachary Green, USD faculty; consultant

Experience and learn conversational practices that promote effective communications in contentious situations. Explore your own "hot buttons" that trigger escalations of tensions as well as proven methods to bring difficult conversations to better resolutions. We will pay particular attention to emerging theory and applied methodologies that bring common sense solutions to addressing conflict.

Room 223A

Donor-Centric Governance — Are You There Yet?

Panelists: *Anne Farrell, chief philanthropy officer, Voices for Children; Steve Jennings, senior vice president and executive director, Rady Children's Hospital Foundation; Bill Littlejohn, CEO and senior vice president, Sharp HealthCare Foundation; Tim O'Malley, vice president for university relations, University of San Diego; Todd Schultz, director of development, The Old Globe; Shelly Stuart, senior vice president/ chief development officer, San Diego Humane Society; and Joe Watkins, vice president for external relations, Point Loma Nazarene University*

Moderator: *Mark Stuart, foundation president, San Diego Zoo Global*

Imagine gathering around your board table to make strategic decisions for your nonprofit and constantly thinking: How will this affect short- and long-term friend-raising and fund-raising?

Join the chief development officers of San Diego's leading nonprofits as they lead a discussion about donor-centric governance. Are you donor-centric? Do you consider the impact upon donors and prospective supporters in all your board-level decisions? What benefits might come from becoming highly donor-centric? What are the characteristics of highly-effective, donor-centric nonprofits and the board members who lead them?

Room H

Financial Hot Button Issues for Nonprofit Boards

Brian Yacker, partner, YH Advisors

We will address the key financial considerations which all nonprofit board members must be aware of, including board oversight of the entity's finances, transparency, reasonable compensation, insider transactions, conducting of unrelated activities, required information reporting, fundraising activities, state registrations and foreign activities.

Room I

Financial Inquiry: Taking Financial Oversight Further (I)

Andy Maffia, senior manager, AKT and Elsa Romero, partner, AKT

Effective board members must be able to review the financial information of their organization, know what questions to ask, and understand how to maintain compliance with the IRS. During this session you will learn not only how to analyze internal financial statements, the IRS Form 990 and audits, but how these documents can be used as marketing tools when speaking with potential donors.

12:10 – 1:00 p.m.

Rooms A-D

Lunch

1:10 – 2:00

KIPJ Theatre

Keynote — **Conversation between Two Exceptional Kaleidoscope Leaders**

Marjory Kaplan, CEO, San Diego Jewish Community Foundation and **Dr. Paula Cordeiro**, dean, *USD School of Leadership and Educational Sciences* will explore leadership lessons garnered from their individual life's work. Marjory will share the secrets of how to build a high functioning board, what accomplishments result from making the effort, how the extraordinary SDJCF developed and what it takes to maintain it. Paula will discuss what it takes to grow a responsible, connected and excellent institution that stays on the cutting edge of thought. Together, they will explore how this work relates to and strengthens our community and the world.

2:00 - 3:30

Workshops: Choose from the following ten workshops.

FIRST FLOOR

Rooms EF

Inside the 2014 Kaleidoscope Award Winner Boardroom: Ocean Discovery Institute (ODI)

Kurt Gering, board member; manager, talent analytics, San Diego Regional Airport Authority; Genette McGowan, vice chair; owner, Home Away From Home; Ted Griswold, board member; partner, Procopio, Cory, Hargreaves & Savitch, LLP; Edith Glassey, Kaleidoscope Award Committee; associate executive director, Center for Community Solutions

ODI's mission is "to engage, educate and inspire young people from urban and diverse backgrounds through science-based exploration of the ocean and nature, preparing them to be tomorrow's scientists and environmental leaders." Seven years ago the board took a transformational leap to create a science laboratory in City Heights that could both help transform local young residents as well as the neighborhood. Upon completion, their learning laboratory will serve 20,000 students a year. ODI has won a Presidential Award and is in a partnership with the National Oceanic and Atmospheric Administration. ODI exemplifies exceptional governance through their commitment to realize an extraordinary vision, their courage in fulfilling this vision and their discipline in carrying their decision to fruition. Join a free-ranging conversation with ODI's leadership as they share the governance lessons they learned along the way.

Room G

New Federal Audit Regulations: Avoiding Compliance Pitfalls

Rollie Munger, CPA, senior audit manager, Sonnenberg and Company, CPAs and Leonard Sonnenberg, CPA, managing shareholder, Sonnenberg and Company, CPAs

This workshop will address the new audit regulations going into effect for 2015. It will provide insight and tools to help organizational staff comply with the new federal regulations through discussions on the policies, best practices and controls an organization needs to implement to ensure that federal regulations are being met.



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SECOND FLOOR

Room 215

The Role of Place

Charlene Seidle, executive vice president, Leichtag Foundation

Place can play a powerful role in advancing opportunities for engagement and improving quality of life. By focusing on a geographic area, funders, nonprofits and civic activists alike can take a holistic, multi-faceted approach to creating change, leveraging deep knowledge to develop innovative methodology and focused evaluation. Join Leichtag Foundation leadership to hear about the opportunities and challenges they face as a local foundation focused on two locations — North County Coastal San Diego and Jerusalem.

Room 217

Managing the Board's Work (A)

Christy Wilson, executive director, Rancho Santa Fe Foundation; USD faculty

Traditionally, board members are called upon to inspire and lead the strategic direction of the organization while management performs most of the daily functions, at the direction of the board. In this session, we will discuss the relationship between the board and management, specifically the relationship between the Chairman and the CEO. Based on this relationship, we will discover how a high functioning board will embrace the leadership/management dynamic.

Room 218

The Next Generation of Nonprofit Board Leaders

Lauren Grattan, director of development, Natural High; board chair, Young Nonprofit Professionals Network (YNPN) San Diego and Efreem Bycer, founder, BoardNEXT

Nonprofit organizations are focusing on sustainability more than ever; having board members who aren't already planned giving prospects is often touted as a solution for diversifying revenue, bringing a fresh perspective, and keeping up with the times. So what do you do after you complete a board matrix and realizing you don't have age diversity on your board? How do you break out of business as usual to recruit different kinds of board members? In what ways can you engage younger leaders for meaningful and effective board service? We will walk you through both the cultural perception shifts and practical steps necessary to grow and sustain your board with younger leaders — to continue making our community stronger.

Room 219

Utilizing Market Research Effectively

Shannon Knock, assistant research director, Luth Research

With an ever-increasing focus on the percentage of funds allocated to overhead, boards must determine what else matters to donors in order to stand out and make an impact in their area of focus. Opinions of donors and potential donors can be gathered and analyzed in order to develop a strategic action plan to guide the board's decisions. Recent case studies will be shared to illustrate the myriad ways in which market research can be used to inform resource planning and application, including who to target, how and where to find them, what motivates them and how to maintain and increase involvement.

Room 220

Opportunities and Obstacles: Navigating Nonprofit Partnerships

May Harris, partner, For Purpose Law and Mary Tovella, For Purpose Law

Navigating nonprofit partnerships, collaborations and joint ventures can be tricky and complicated. Join two experts as they discuss how tax-exempt entities can participate in joint ventures with other entities (including for-profit entities) without endangering their exempt status. The workshop will also address the related topics of the Unrelated Business Income Tax (UBIT), the threat that UBIT can pose to tax-exempt status, and structural approaches to deal with that threat.

Room 223A

Governing in a Fiscally Sponsored Program (B)

Jessica Kort, marketing and communications officer, Jewish Community Foundation and *Rubi Trevino*, assistant director of board engagement and operations for alumni and community engagement, University of California San Diego (UCSD); board development committee chair, YNPN San Diego

Many nonprofits start as purely volunteer efforts with people who are on fire for a mission, but who don't necessarily have the capacity to become their own incorporated 501(c)(3) organization. Fiscal sponsorship, housing your charitable program under the tax and legal auspices of a fully-fledged nonprofit, is growing in popularity — especially for smaller, volunteer-driven nonprofits. With this different structure comes different governance requirements. Join two experts as they discuss what kinds of policies and culture it takes to govern at YNPN San Diego (the young nonprofit professionals network), a volunteer-run, fiscally sponsored organization.



Room H

How to Showcase Your Nonprofit and Create the Transparency that Donors and Funders are Looking For (B)

Mike Lichtenberger, shareholder, Mayer Hoffman McCann PC; *Heather Hernandez*, senior manager attest services group, Mayer Hoffman McCann P.C.; and *Jasmine Marrow*, director of nonprofit strategy, GuideStar

Transparency is one quality that donors, funders and other stakeholders are looking for in a nonprofit and it's something that nonprofits are striving to achieve. How can nonprofits utilize resources like The GuideStar Exchange program to create transparency and provide the information donors and funders are looking for? Please join us for a presentation and panel discussion on how nonprofits can showcase their commitment to transparency and better position themselves to be considered by donors and funders.



Room I

How to Build a Financially Sustainable Organization for the Long Haul

Laura Roos, partner, Southern California Not-for-Profit practice leader, Moss Adams LLP and *Linda Spuck*, CTTA, vice president and personal trust administrator, The Private Bank-San Diego

More than ever nonprofit organizations are facing financial challenges, which threaten their long-term sustainability. Two financial professionals will share their insights into how nonprofit boards can protect their organization's future through effective policies and careful planning. Drawing on experience with charitable organizations, they will provide best practice ideas — from the big-picture to the nitty-gritty — that can be implemented to enhance organizations of any size.



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- 8:00 a.m. Registration, breakfast and networking
- 8:30 Welcome | **Pat Libby**, professor of practice and director, USD Nonprofit Institute
- 8:45 Keynote Address
“Uncommon Sense on Boards: Turning Conventional Wisdom on its Head”
Jan Masaoka, CEO, California Association of Nonprofits
- 9:30 Break
- 9:45 – 10:45 Mini-Lectures: Choose from the following eight mini-lectures.

FIRST FLOOR

Room F

Both Sides Now: How Great Financial Management Can Connect Stakeholders with Mission

Bob Betty, Betty & Company; USD faculty

The complexity of nonprofit financial management and reporting continues to deepen. Boards, private and public funders, watchdog groups, employees and others continue to raise their expectations for the accuracy, timeliness and — most importantly — the transparency of your operations. Great financial management allows you to lead the discussion with stakeholders instead of responding to old models. This session will cover ways to develop dashboards that establish a common, proactive language; build a budget process that will drive and communicate strategic change; create a planning culture; and improve the ability of stakeholders to look through the numbers and into your operations.

Room G

Innovations in the Creation of Social Value

Mark Peters, assistant director, USD University Ministry; USD faculty

Remember John Naisbitt who coined the term “megatrends?” Explore major global trends affecting the nonprofit sector with our very own megatrend master, Mark Peters, as he shares his thoughts on how to capitalize on some of the megatrends in the field and even create some trends of your own through your own organization. Using recent insights from the growing field of Social Entrepreneurship and some inspiring examples from up and coming social entrepreneurs, you will learn about how you can innovate in the creation of social value.

SECOND FLOOR

Room 215

Refugees in Our Midst

Bob Montgomery, executive director, International Rescue Committee

Did you know that San Diego plays an important role in our country’s refugee resettlement effort? Since 1975 about 100,000 to 150,000 people have joined our community (about 3,500 people a year) adding to San Diego’s rich social capital. They come from Vietnam, Russia, Africa, the Middle East, Central and Southeast Asia and other regions to make a new life. They bring us new traditions, food, agriculture and more. It takes guts to come and wisdom to help refugees acclimate. Join one of our local experts to hear about refugees in our midst: who they are, who helps them and what they add to our community.





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Room 217

State of Nonprofits and Nonprofit Trends in San Diego

Mary Jo Schumann, associate director and Kim Hunt, graduate research assistant, USD Caster Family Center for Nonprofit and Philanthropic Research

Learn about the State of Nonprofits (SoNP) Quarterly Index, which reports on six distinct indicators that have a direct impact on the economic health of San Diego's nonprofit sector: public confidence, individual giving, volunteering, demand for services, nonprofit employment, and overall unemployment. After reviewing 14 quarters of longitudinal data on these indicators, there will be an interactive discussion on what strategies you and other San Diego nonprofits can use to proactively and reactively respond to this data and other trends in the nonprofit sector.

Room 218

Beyond Generosity: The Logic Behind Donor Giving

Jennifer A. Jones, graduate research associate, USD Caster Family Center for Nonprofit and Philanthropic Research; USD and National University faculty

Emerging research indicates that philanthropic giving is often motivated and shaped by a donor's developmental framework or action logic. Studies have shown that an individual's action logic colors every decision they make, including when, where and how to offer a charitable donation. Discover the core action logics and how to understand how they work in practice. We will reflect upon the ways in which an understanding of this framework helps strengthen donor relations and the sacred responsibility that comes with nonprofit sector leadership.

Room 219

The Evolution of Volunteerism in San Diego: From One-Stop Shop to a Service Tapestry

Sue Carter Kahl, president, SMCK; Jaci Feinstein, board chair, HandsOn San Diego, Melinda Wilkes, director volunteer engagement, Jewish Family Service of San Diego; USD Faculty and Sarah Adams, director of volunteer recruitment, Voices for Children, Volunteer Administrators Network; volunteer manager learning group facilities, Nonprofit Management Solutions

San Diego's volunteer scene has been very dynamic in the last few years. Organizations have taken up new roles in supporting service and two volunteer-related nonprofits have folded. Despite a desire for a one-stop shop for service, there seems to be more potential for weaving a tapestry made up of diverse volunteer program threads. This session will be a facilitated conversation between some of the current players in local service and workshop attendees.

Room 220

Social Media Marketing: Best Practices for a Successful Campaign

Devon Foster, associate director for communications and marketing, School of Leadership and Education Sciences, USD

Join Devon Foster to evaluate your social media efforts, create a plan to make sure your key messages are heard and identify what platforms are worth your time. She will demonstrate the various free tools that are available to help you manage and continually evaluate your social media presence. You'll also hear about best practices and how to integrate social media into your existing initiatives.

Room 223

Recruit 5 Great New Board Members in the Next 3 Months

Jan Masaoka, CEO, California Association of Nonprofits

Board recruitment discussions usually start with the tired question, "Who do we know?" In this session, Jan Masaoka introduces the Blue Ribbon Board Nominating Committee and a series of other tested, innovative techniques that will help get the right people on the board and even more importantly, get them to start working on day one. This session will cover whether and how to recruit people of different ethnicities or educational backgrounds, whether to have clients or parents (or other direct beneficiaries) on the board, and whether to have fundraising or donation requirements.

10:45 a.m.

Break

Saturday

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11:00 – 12:30 p.m.

Workshops: Choose from the following eight workshops.

FIRST FLOOR

Room E

Know When to Hold, Know When to Fold: Closing your Organization

Jessica Green, Jess Green Consulting

Making the decision to close a nonprofit is tough, navigating the legal and emotional aspects of actually shutting down can be even tougher. But it can be done in a way that honors the work and the people that comprise the organization's history. We will look at how to gracefully navigate shutting down a nonprofit from the legal perspective, as well as the human perspective.

Room F

Winning the Lottery: How to Use your 990 to Strengthen Your Case for Support

Patricia Jo Mayer, senior tax manager, Moss Adams LLP

Walk through some case studies to learn about using your form 990 to entice the next lottery winner to support your organization. What should the new lottery winner look at and research to become educated about your organization? The form 990 is a magnificent tool to draw the new lottery winner to your organization. Tell your story and tell it well, from basic solid governance procedures, financial data and program accomplishments, to compensation approval processes and transactions with insiders. Your opportunities are unlimited!

Room G

Systems Thinking

Ron Mitchell, partner, AKT and Carol Stachwick, CPA, AKT

A complex world requires new ways of thinking. It's time to consider a different approach to problem solving. Systems thinking is seeing beyond isolated events to the patterns, connections and causes that explain many of the problems that confront us in organizations. We will apply systems thinking to a critical management issue as well as provide exercises, worksheets and tools for you to take back to you organization.

SECOND FLOOR

Room 217

The Board's Role in Advocacy

Debra Rogers, nonprofit advocacy consultant and Danny Melgoza, deputy chief of staff to San Diego County Board of Supervisor Greg Cox

Join two experts as they discuss advocacy and the role that it can play for local nonprofits and the communities they serve. Topics include educating a board about lobbying and advocacy laws, reaching out to legislators and collaborating with other organizations. You will leave with a tool kit of practical steps to advocate for your cause and the confidence to do it well.

Room 218

Dollars and Sense: Developing Your Organization to Achieve Fundraising Success

Elizabeth Castillo, graduate research assistant, USD Department of Leadership Studies; USD faculty

Financial resources are essential to organizational success. Yet successful fundraising depends on the entire organization, not just the development department. In this session you will learn how to create a corporate culture that aligns people, policies and processes to create ongoing success in fundraising. The session will also cover strategic program design as a way to create new resources that promote financial sustainability.



Room 219

The Power of Campaign Fundraising (A)

Carole A. Fish, principal, FISH+LEWIS Consulting; USD faculty and Mark Stuart, foundation president, San Diego Zoo Global

Learn how a fundraising campaign can energize the board, focus staff and engage the community in ways you could only imagine! This session is designed to give you the fundamentals and “silver bullets” you will need to raise more money for your nonprofit, while connecting in positive ways with your stakeholders.

Room 220

**Engaging the Public in Your Cause:
How to Get Support When You Need it Most**

Deirdre Maloney, president, Momentum LLC

The good news? You are connected to an organization that you believe in, one that does good work and has natural champions in the community. The tricky part? Finding those champions and convincing them that yours is the cause for them. It’s harder than it might sound at first, but it’s possible. And it can happen relatively quickly, as long as you’ve got a good, solid marketing strategy. How do you target those most likely to support your cause, get them to support you and — even better — get them to get their colleagues to do the same? This session will cover the information and structure you need for new levels of support and success!

Room I

Strategic Alliances

Kate Wheeler, senior director of development and strategic alliances, United Through Reading (UTR)

Learn how your nonprofit can create partnerships and alliances with other nonprofits, corporations and individuals that will make every donor dollar go further and every program offering more dynamic. We will explore a model developed by The Drucker Foundation (now the Leader to Leader Institute), which has led to partnerships between UTR and Google, Target, the White House and many others.

12:30 – 1:30 p.m.

Lunch

Keynote — **Philanthropy and Nonprofit Innovation:
Thinking about your future and how to get there**

Pedro Villegas, director of community relations, SDG&E

Rooms A-D

Innovation is a process that brings together various novel ideas in a way that they have an impact on society. San Diego Gas and Electric has a unique vantage point, supporting 600 nonprofit partners across our region. Pedro Villegas, SDG&E’s director of community relations, will explore the challenge of innovation and its relationship to philanthropy, because the vision that got your nonprofit here may not get your nonprofit where it wants to go.

1:30 – 3:00

Plenary Session

Saving the Opera: Lessons learned from a board perspective

Moderator: *Linda Spuck, board member, San Diego Opera; vice president and personal trust administrator, The Private Bank San Diego, Union Bank*

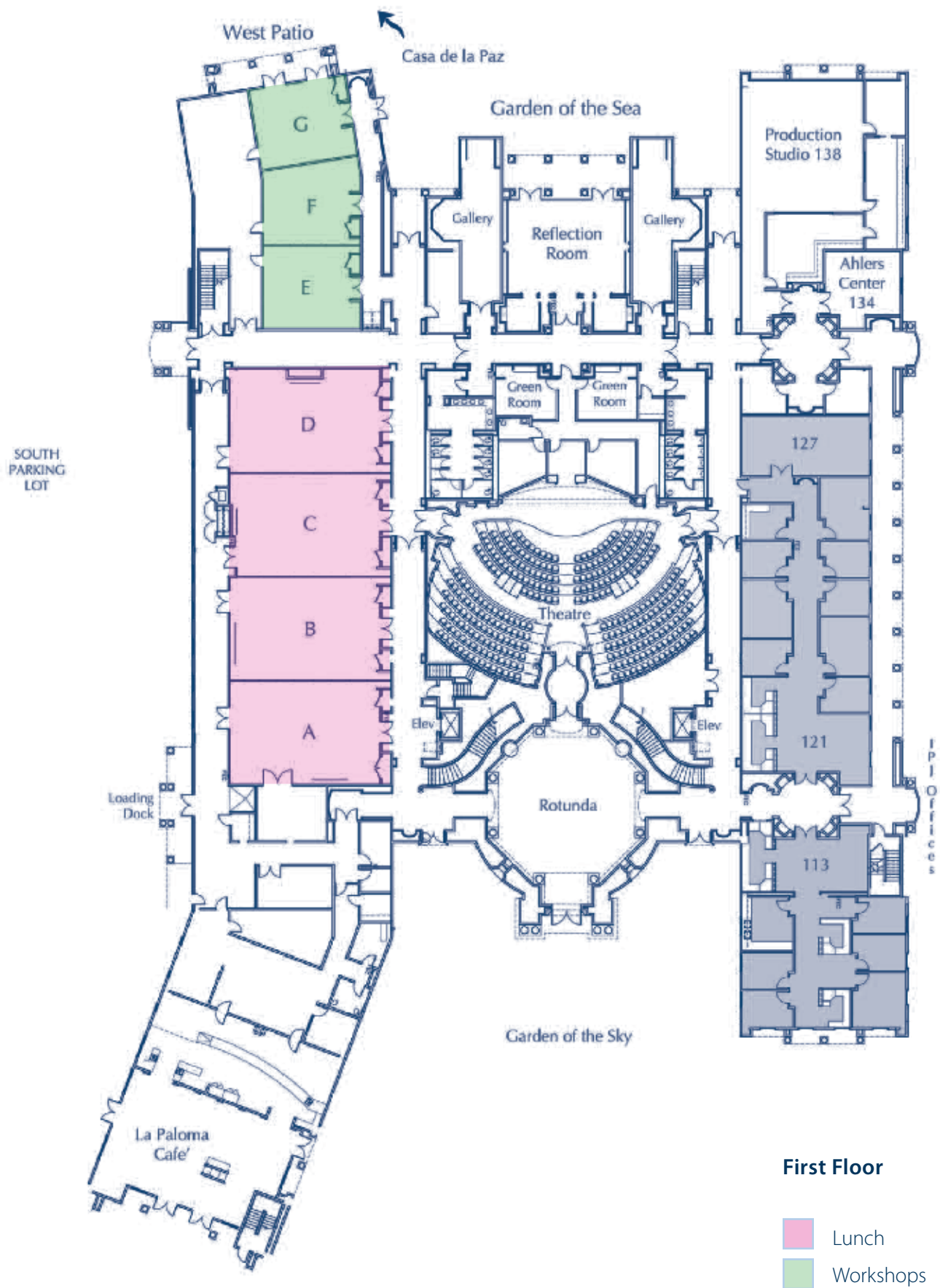
KIPJ Theatre

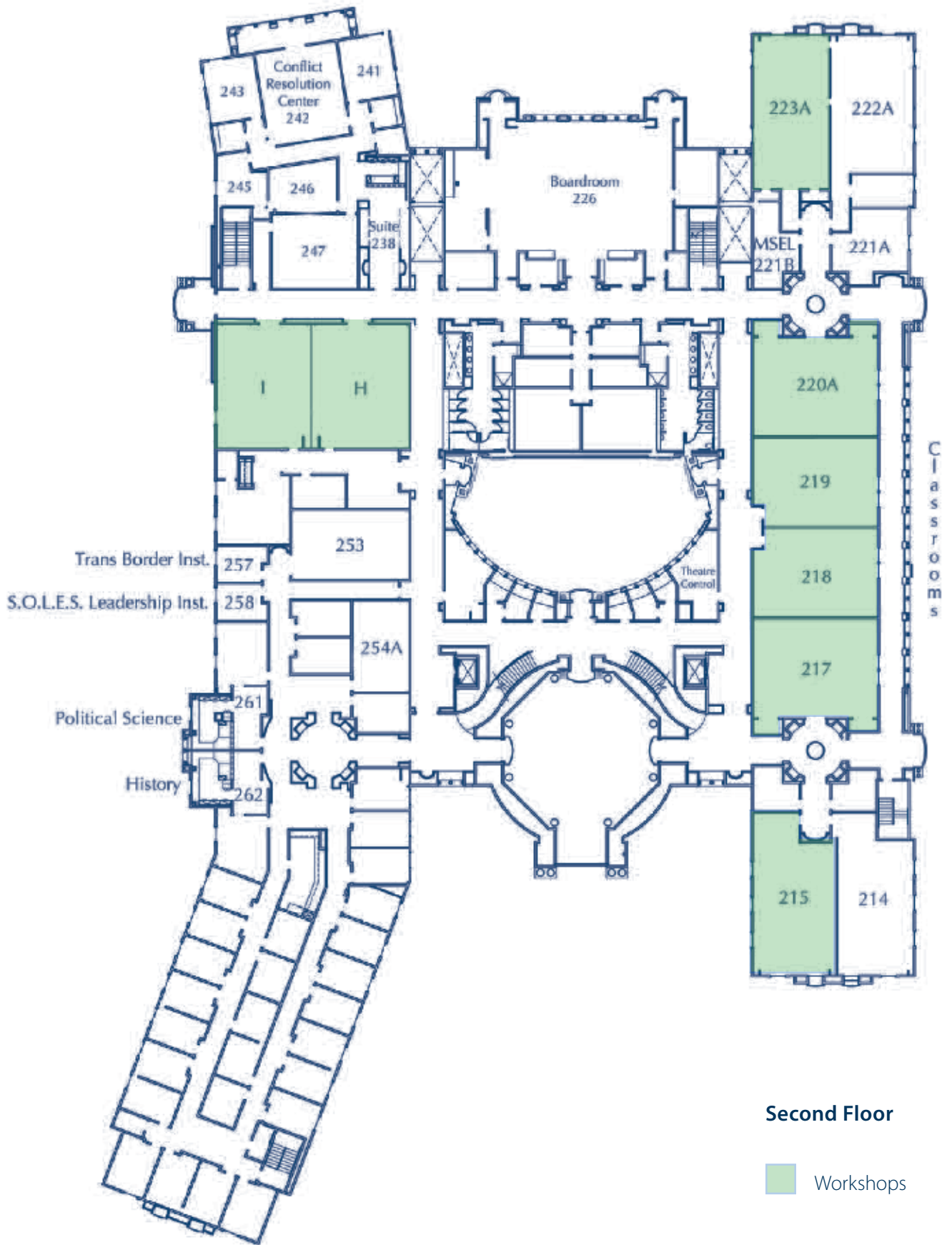
On March 19, 2014 the San Diego Opera Board of directors voted 33-1 to cease operations due to a seemingly insurmountable financial shortfall. Two months later, a leaner more engaged board voted to rescind the vote, produce a modified 2015 season and begin the generative thinking necessary to create a new sustainable model for opera in San Diego. A panel of board members will share lessons learned from this process and provide a glimpse into the future with a focus on applications that can benefit any nonprofit organization.



Saturday
January 10, 2015

Map of Joan B Kroc Institute for Peace & Justice





Second Floor

Workshops

About the Institute for Nonprofit Education and Research

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



M.A. in Nonprofit Leadership and Management

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

- How do I maximize my impact?
- How do I lead my nonprofit successfully in a world of scarce resources?
- How do I master the art of change management?
- How do I discover who I am as a leader?

The program is designed for individuals who want to be part of an intentional learning community of practitioners and scholars who are embedded in the field.

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

Through:

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

Ph.D. in Leadership Studies with a Specialization in Nonprofit/Philanthropic Leadership and Management

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

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

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

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

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

USD Kaleidoscope Award for Exceptional Governance

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

The mission of the USD Kaleidoscope Award for Exceptional Governance is to recognize, celebrate, promote and inspire excellence in nonprofit governance in the San Diego region. The Kaleidoscope Award

Committee is now accepting nominations for the Tenth Annual Kaleidoscope Award for Exceptional Governance. The winner will be announced at the 12th Annual USD Nonprofit Governance Symposium.

The award winning organization will receive a \$500 cash award plus five complimentary passes to the 12th annual symposium in recognition of their leadership, service and accomplishments. Their name will also be placed on the Kaleidoscope Award recognition wall at USD's School of Leadership and Education Sciences.

Past USD Kaleidoscope Award for Exceptional Governance winners include:



Nominate Your Nonprofit for The Kaleidoscope Award

<http://sandiego.edu/npgovernance/>

Thank you

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



UPCOMING EVENTS

Prospective Student Information Session

January 21, 2015, 6:00 – 7:30 p.m.

University of San Diego
Mother Rosalie Hill Hall

Join Nonprofit Leadership and Management current students, alumni and faculty to learn more about the master's degree program. 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 — 91% of our graduates have received promotions or new jobs after graduation!

SOLES Open House

January 24, 2015, 9:30 a.m. – 1:30 p.m.

University of San Diego
Mother Rosalie Hill Hall



For more information, please visit:

<http://www.sandiego.edu/soles/centers-and-research/nonprofit/events/public-events.php>