



## COURSE SCHEDULE

### Day One | Tuesday August 20, 2019

#### 8:30 – 9:00am – Registration and Breakfast

*Sala and Loggia*

#### 9:00 – 9:30am – Welcome and Orientation

*Warren Auditorium*

- **Laura Deitrick, PhD**, Associate Director, The Nonprofit Institute, University of San Diego
- **Lydia Moreno**, Deputy Director, Economic Development, City of San Diego

#### 9:30 – 10:20am – Plenary Session:

*Warren Auditorium*

- **Peter Ellsworth**, President, The Legler Benbough Foundation

#### 10:30 am – 12:00pm – Elective Courses

- Partnering with the City: Overview of Funding Opportunities – *Room 102*
- Nonprofit PR Bootcamp – *Room 131*
- The Power of Design Thinking – *Room 135*
- O Strategy, Strategy, Wherefore Art Thou Strategy? – *Room 133*
- Beyond the Obvious: Understanding Requests for Proposals (RFPs) – *Room 127*

#### 12:00 – 12:45 pm – Lunch

*West Terrace*

\*\*SOLES Graduate Programs Info Session during Lunch – *Room 102*

#### 12:45 – 3:45pm – Core Courses (Choose One)

- o Measuring Success – *Room 127*
- o Integrating Program Design and Budget – *Room 102 (Executive Classroom)*
- o Nonprofit Legal Compliance – *Room 211*

#### 12:45 – 2:10pm – Elective Courses

- Effective Board Governance – *Room 131*
- Financial Basics 101 – *Room 133*
- Leading Across Cultures: Integrating Cultural Competency and Sensitivity – *Room 145*
- Connecting the Dots: Are you CDBG Ready? – *Room 201*

#### 2:20 – 3:45pm – Elective Courses

- Consensus Organizing 101: Building Partnerships through Mutual Self-Interest – *Room 133*
- Storytelling Strategies – *Room 145*
- Nonprofit PR Bootcamp – *Room 131*
- O Strategy, Strategy, Wherefore Art Thou Strategy? – *Room 201*

### Day Two | Wednesday August 21st, 2019

#### 8:30 – 9:00am – Registration and Breakfast

*Sala and Loggia*

#### 9:00 – 9:20am – Welcome and Orientation

*Warren Auditorium*

- **Lyn Corbett**, Director of Governance and Community Programs, The Nonprofit Institute, University of San Diego

#### 9:30 – 12:30pm – Core Courses (Choose One)

- o Measuring Success – *Room 127*
- o Integrating Program Design and Budget – *Room 102 (Executive Classroom)*
- o Nonprofit Legal Compliance – *Room 211*

#### 9:30 – 10:50am – Elective Courses

- Partnering with the City: Overview of Funding Opportunities – *Room 133*
- Effective Board Governance – *Room 131*
- Leading Across Cultures: Integrating Cultural Competency and Sensitivity – *Room 135*

#### 11:00am – 12:30pm – Elective Courses

- Financial Basics 101 – *Room 135*
- Storytelling Strategies – *Room 133*
- Of Love and Leadership in Nonprofits – *Room 131*
- Connecting the Dots: Are you CDBG Ready? – *Room 145*

#### 12:30 – 1:15pm – Lunch

*West Terrace*

#### 1:15 – 3:45pm – Core Courses

- o Integrating Program Design and Budget – *Room 102 (Executive Classroom)*
- o Nonprofit Legal Compliance – *Room 211*

#### 1:15 pm – 3:45pm – Intensive Workshops: Elective Courses

- Financial Basics 102: Maximizing Reserves at Any Size – *Room 133*
- An Introduction to Social Enterprise: Opportunities for Nonprofit Leaders to Develop New, Sustainable Revenue Streams – *Room 131*
- The (B)ART of Nonprofit Leadership – *Room 127*
- Application of Consensus Organizing to Assist with Building Community Partnerships – *Room 145*

#### 3:45 – 5:00pm – Networking Opportunity

*West Terrace*

## CORE COURSE DESCRIPTIONS

### *Integrating Program Design and Budget*

*12:45 – 3:45 pm (Day One), 9:30 am – 12:30 pm and 1:15 – 3:45 pm (Day Two)*

**Bob Beatty**, Principal Consultant, Beatty & Company and **Val Nash**, Owner, Nash & Associates

Did you know that one of the main reasons funding applications are unsuccessful is problems with the budget and fiscal section? This session will walk participants through the process of developing a budget that supports the needs of their program and aligns with best practices and funder requirements. Challenges relating to congruence between outputs (activities and services) and expenses (personnel and non-personnel cost) will be explored. Participants will practice developing budget narratives. The fiscal requirements section of RFQ's will be demystified.

### *Measuring Success*

*12:45 – 3:45 pm (Day One) and 9:30 am – 12:30 pm (Day Two)*

**Laura Deitrick**, PhD, Associate Director, The Nonprofit Institute, University of San Diego

Increasingly, nonprofits are being called upon by their stakeholders to provide “proof” that their programs are successful. While most nonprofit leaders agree that collecting data and measuring success is important, the ability to document tangible outcomes remains elusive for many organizations. Building on an established program planning framework, participants will learn how to: (1) identify measurable outcomes; (2) draft detailed goals and objectives linked to specific program outcomes; (3) locate the tools needed to measure

### *Nonprofit Legal Compliance*

*12:45 – 3:45 pm (Day One), 9:30 am – 12:30 pm and 1:15 – 3:45 pm (Day Two)*

**Mary Tovella Dowling**, Partner, For Purpose Law Group (Day One)

**May Harris**, Founder & Managing Attorney, For Purpose Law Group (Day Two Morning)

**Ryan Kyung Mo Taylor**, Associate Attorney, For Purpose Law Group and **Cecilia N. Brennan**, Senior Associate, For Purpose Law Group (Day Two Afternoon)

We will go over the annual compliance requirements for nonprofit organizations including IRS, Franchise Tax Board, and Attorney General Filings. The workshop is intended to provide guidance to help nonprofit leaders ensure proper maintenance of tax-exempt status by providing an overview on how to reduce overall legal risks and liabilities commonly faced by nonprofit organizations. This workshop also discussed employment issues surrounding staff, volunteers and independent contractors, the necessity of internal policies and insurance coverage, common provisions that should be included in every contract, as well as licensing and permitting requirements.

# ELECTIVE COURSE DESCRIPTIONS

## Day One Only

*O Strategy, Strategy, Where Art Thou Strategy?*

*10:30 – 12:00 pm and 2:20 – 3:45 pm (DAY ONE ONLY)*

**Lyn Corbett**, Director of Governance and Community Programs, The Nonprofit Institute, University of San Diego.

In a constantly changing environment, nonprofits seek new strategies to develop traction in their organizations and communities. This session introduces the concept and practice of being strategic versus reactionary in nonprofit organizations. The emphasis is on the benefits of thinking strategically, the practices for developing and advancing strategy, and the keys to effective strategic planning.

*Beyond the Obvious: Understanding Requests for Proposals (RFPs) (DAY ONE ONLY)*

*10:30 am – 12:00 pm*

**Val Nash**, Owner, Nash & Associates

This workshop takes a deep dive into how to analyze Requests for Proposals (RFPs) or other similar funder guidelines\* as an essential strategy in developing winning proposals. We will look at how RFPs provide essential information, offer multiple opportunities to impress, and communicate the values and priorities of the funder. Participants will assess their capacity to respond to RFPs and work collaboratively to dissect actual RFPs for information and meaning. \*Lots of different terms for essentially the same thing – Request for Application (RFA), Notice of Funder Availability (NOFA), etc.

*Consensus Organizing 101: Building Partnerships through Mutual Self-Interest*

*2:20 pm – 3:45 pm (DAY ONE ONLY)*

**Jennifer Cosio**, MSW, PPSC, Executive Director, Consensus Organizing Center

**Dr. Jessica Robinson**, MSW, Lead Trainer, Consensus Organizing Center

This two-part session will cover the background of the Consensus Organizing model. Day one will focus on how community partnerships are established and maintained through social capital and mutual self-interest. Day two will introduce how to form and build partnerships with internal and external community stakeholders for sustainable long-term program success and will include a hands-on exercise with a share-out and feedback from trainers.

Day 1: Consensus Organizing 101: Building Partnerships through Mutual Self-Interest

Day 2: Application of Consensus Organizing to Assist with Building Community Partnerships

*Nonprofit PR Bootcamp*

*10:30 am – 12:30 pm and 2:20 – 3:45 pm (DAY ONE ONLY)*

**Jack Berkman**, President and CEO of Berkman Strategic Communications

“Tired of wanting to know why you can’t seem to get your story out”. Jack Berkman, President and CEO of Berkman Strategic Communications, has created the ultimate PR Workshop for nonprofit professionals to better understand the huge benefits of properly conceived and executed PR programs...the smart way! We will examine what Public Relations entails and how to create exceptional brand recognition. This program brings participants a deeper understanding of their own organizations strengths and learn how to continually separate and elevate their brand. We will cover such topics as: media relations; key message development; effectiveness of maximizing ambassadors; and getting your story out to your target audience in the community and more.

*The Power of Design Thinking: An Innovative Framework for Social Change*

*10:30 am – 12:00 pm (DAY ONE ONLY)*

**Karen Henken**, Professor of Practice, Social Innovation and Entrepreneurship  
Kroc School, University of San Diego

Design thinking (or Human-centered design) is a powerful and transformative process to help organizations apply empathy, better assess and understand problems and approach designing solution in new ways. It starts with a deep dive to understand for *WHOM* you are developing solutions and the root cause of the problems they are experiencing. It encourages creative and inclusive team approaches to experiment, prototype, iterate and design solutions *WITH* the community you plan to serve and support.

According to IDEO.org:

*Human-centered design is a creative approach to problem solving..... It’s a process that starts with the people you’re designing for and ends with new solutions that are tailor made to suit their needs. Human-centered design is all about building a deep empathy with the people you’re designing for; generating tons of ideas; building a bunch of prototypes; sharing what you’ve made with the people you’re designing for; and eventually putting your innovative new solution out in the world.*

During this workshop participants will learn some key concepts of design thinking and engage in some highly interactive exercises to apply these principles. You will learn how design thinking can provide a new framework for you and your teams to be more effective at working with your clients, customers and stakeholders for more effective solution development.

## Day Two Only

### *Of Love and Leadership in Nonprofits*

*11:00 am – 12:30pm (DAY TWO ONLY)*

**Zachary Green**, PhD, Professor of Practice, Department of Leadership Studies, University of San Diego

When we think about leadership, how often do we think of love? This workshop is an experiential exploration of the intersections between love and leadership and the implications for deliberative action in nonprofits. Beginning with an examination of the dimensions of love as presented in classic Greek mythology, we will bring this thinking forward to contemporary times. Our task will be to discover the different ways we likely already practice leadership based in love in our organizations. Particular attention will be given to our own definitions of love and leadership and that of select scholars as the foundation for our learning. Through an approach that invites personal reflection, the meaning and application of love and leadership to ourselves as leaders as well as to the mission, vision and values of our organizations will be considered.

### *The (B)ART of Nonprofit Leadership*

*1:15 – 3:45 pm (DAY TWO ONLY)*

**Zachary Green**, PhD, Professor of Practice, Department of Leadership Studies, University of San Diego

The effectiveness of nonprofit leadership can often be traced to how key organizational processes are understood and employed. This interactive workshop invites participants to explore and begin to apply the art of four fundamental processes: boundary (B), authority (A), role (R), and task (T) can enhance organizations. Participants will discover ways BART can be used to conduct a quick analysis of what may be at issue in their nonprofit. Focus will be especially given to how to apply BART as a tool to address and potentially improve organizational effectiveness.

### *Application of Consensus Organizing to Assist with Building Community Partnerships*

*1:15 pm – 3:45 pm (DAY TWO ONLY)*

**Jennifer Cosio**, MSW, PPSC, Executive Director, Consensus Organizing Center

**Dr. Jessica Robinson**, MSW, Lead Trainer, Consensus Organizing Center

This two-part session will cover the background of the Consensus Organizing model. Day one will focus on how community partnerships are established and maintained through social capital and mutual self-interest. Day two will introduce how to form and build partnerships with internal and external community stakeholders for sustainable long-term program success and will include a hands-on exercise with a share-out and feedback from trainers.

Day 1: Consensus Organizing 101: Building Partnerships through Mutual Self-Interest

Day 2: Application of Consensus Organizing to Assist with Building Community Partnerships

*Financial Basics 102: Maximizing Reserves at Any Size*  
*1:15 – 3:45pm (DAY TWO ONLY)*

**Rick Dahlseid**, Nonprofit Division Lead, Pro Back Office, LLC

Financial statements are a primary way to communicate confidence, accountability, sustainability and stewardship of a nonprofit. Many stakeholders depend on trustworthy financial information to make informed economic decisions. This session will take a deeper dive into the areas of:

- Audits, what's to know about the statements and those notes
- Reserves-How much is enough?
- Best practices for budgeting and forecasting
- Key take-a-ways from the first 11 pages of your IRS Form 990.
- Important Ratios
- Internal controls

You will want to bring a copy of your nonprofit's latest financial statement and IRS Form 990 to learn what you need to know in your role.

*An Introduction to Social Enterprise: How Nonprofit Leaders Can Assess and Leverage This Model to Develop New, Sustainable Revenue Streams*  
*1:15 – 3:45pm (DAY TWO ONLY)*

**Karen Henken**, Professor of Practice, Social Innovation and Entrepreneurship, Kroc School, University of San Diego

Social enterprise represents powerful new opportunities for diversified funding sources, scalability and increased social impact in the nonprofit sector. By creating sustainable revenue streams, hybrid social enterprises are changing their reliance on donations and grants for growth. In today's workshop, we will explore different models of social enterprise and evaluate both best practices and challenges with respect to their impact on nonprofit management, growth and opportunities.

In the first half of this workshop, we will look at several case studies to understand how social, financial and management objectives need to align for social enterprise success. In the second half of the workshop, attendees will then apply some of these key elements of social enterprise design and assess where there might be relevant opportunities for their own organizations. Participants will leave with new insights about the power, benefits and challenges of this emerging nonprofit model.

## Day One & Two

### *Leadership Across Cultures: Integrating Cultural Competency and Sensitivity*

*12:45 – 2:10 pm (Day One) and 9:30 – 10:50am (Day Two)*

**Antonio Jimenez-Luque**, PhD, Professor of Practice, Department of Leadership, University of San Diego

This session examines issues concerned with learning about and learning from the cultural, ethnic, and racial diversity we found in contemporary American society and in the world, and how it relates to organizational leadership issues. Racism and other social justice issues have a history, causation, a social structure, and a complex web of consequences. On the other hand, a study of the history, causes, structure, and consequences offers some hope that effective interventions may be developed to reverse the course of racism, exclusion or oppression. Moreover, we will apply our session issues toward addressing the development of global and intercultural citizenship that exercises leadership in the building of community justice and promoting inclusive organizational systems.

### *Effective Board Governance*

*12:45 – 2:10 pm (Day One) and 9:30 am – 10:50 am (Day Two)*

**Pat Libby**, CEO and Consultant, Pat Libby Consulting

When nonprofit boards are at their best, they provide strategic and operational support that is invaluable to an organization's success. When they aren't well functioning, they can sap the energy of even the most committed staff and volunteers.

This interactive workshop will explain and guide participants through an understanding of:

- The core legal responsibilities of nonprofit boards
- Recruitment and retention basics
- Strategies for designing an effective governance structure
- Essential governance documents

You'll leave the session feeling informed and energized about how to create an effective nonprofit board.

### *Financial Basics 101*

*12:45 – 2:10 pm (Day One) and 11:00 am – 12:30 pm (Day Two)*

**Rick Dahlseid**, Nonprofit Division Lead, Pro Back Office, LLC

Financial statements are a crucial indicator of past performance and future progress. They are necessary to provide many different parties with economic information to help inform prudent decisions. Donors, sponsors, banks, the community, the government, boards, volunteers, and employees are some of the major categories of stakeholders interested in a nonprofit's financial performance. This class will begin at the basic level and go through the Who, What, Where, Why, and How to use financial statements for their intended purpose, as well as other valuable uses of financial information. With a complete understanding of an agency's financial health, an organization can demonstrate stewardship to its stakeholders in a way that accurately and honestly tells their story.

*Storytelling Strategies*

*2:20 – 3:45 pm (Day One) and 11:00 – 12:30 pm (Day Two)*

**Colton C. Strawser**, MS, CFRE, Doctoral Researcher, The Nonprofit Institute, University of San Diego

Nonprofits large and small are tasked with sharing the stories of impact of an organization, but sometimes this work is easier said than done. In the hectic day of the nonprofit, sometimes managers spend their time communicating more internally than they do externally. This workshop is designed to help nonprofits gain an understanding of marketing fundamentals, while also discovering how to use stories to generate both clients and donors. Participants will learn how to: (1) Utilize low-cost marketing methods that have high returns; (2) How to utilize storytelling formulas to create calls to action; and (3) How to create a brand and marketing strategy that shares the important work of an organization's programs and services.

*Partnering with the City: Overview of Funding Opportunities*

*10:30 am – 12:00 pm (Day One) and 9:30 – 10:50 am (Day Two)*

**Atilano Moran**, Community Development Project Manager, City of San Diego Economic Development

**LaTisha Thomas**, Community Development Specialist, City of San Diego Economic Development Department

**Courtney Thomson**, Council Grants Coordinator, City of San Diego Council Administration

**Gail Wingfield**, Senior Arts and Culture Funding Manager, City of San Diego Commission for Arts and Culture

**Jocelyn Maggard**, Business Development Specialist, City of San Diego Economic Development

**Jasmine Mallen**, Grants and Contract Analyst, City of San Diego Council Administration

The City of San Diego provides a variety of funding opportunities for nonprofit organizations providing programs and services in the City of San Diego. Millions of dollars are awarded to nonprofit organizations on an annual basis using competitive processes. This session will provide attendees with an overview of opportunities available to nonprofits and how to apply for these opportunities.



## INSTRUCTORS AND PRESENTERS

**Bob Beatty**, Principal Consultant, Beatty & Company

“The best way to predict the future is to create it.” - Peter F. Drucker

For over fifteen years, Beatty & Company has been providing financial consulting services exclusively to nonprofits in Southern California. As its principal consultant, Bob brings a perspective that includes fundraising, health & human services, grant making, and government programs. Projects have included cash flow restructuring & turnaround, staff reorganization, and back office consolidation. Since 2001, Bob has served as chief financial officer (full-time, part-time, interim, and advisory) and provided other services for a variety of nonprofits including: He also serves as adjunct faculty at USD’s Nonprofit Leadership and Management master’s program, teaching nonprofit finance. Bob’s MBA is from Claremont Graduate School (The Drucker School), and his BSc Economics is from Arizona State University.

Alliance Healthcare Foundation

MAAC Project

Casa De Amparo

Make-A-Wish San Diego

Chicano Federation

Planned Parenthood San Diego

Episcopal Community Services San Diego

San Diego Center for Children

Father Joe’s Villages/ St Vincent DePaul

United Way of Los Angeles

Home Start, Inc.

United Way of Orange County

Jacobs Center for Nonprofit Innovation

United Way of San Diego County

Jewish Federation of San Diego County

Volunteers of America Southwest

**Jack Berkman**, President and CEO of Berkman Strategic Communications

Jack M. Berkman is the President and CEO of Berkman Strategic Communications, a nationally recognized and multi-award-winning PR/ Communications and Branding firm, whose clients are among the most prestigious in their respective professional fields, regionally and nationally. He has more than 40 years of experience in the PR/Communications field. Berkman is officially APR, Accredited Member of the Public Relations Society of America in 1976. In 2010, Berkman was officially inducted in Washington D.C. into the highly exclusive Public Relations Society of America’s College of Fellows, in recognition of his distinguished career in the practice of Public Relations; while long exhibiting personal and professional qualities as a role model for practitioners and advancing the state of the profession. Berkman Strategic Communications has earned over 70 Bernays Awards for Public Relations excellence from the San Diego Chapter of the Public Relations Society of America. The firm was awarded the highest National PR Award in the industry, receiving the prestigious Public Relations Society of America’s Silver Anvil Award, for its representation of JABRA for its World-Wide Public Relations Campaign.

**Cecilia N. Brennan, Esq., Senior Associate, For Purpose Law Group**

Cecilia N. Brennan, Esq. is a senior associate with For Purpose Law Group. Ms. Brennan brings over fifteen years of legal experience in various areas of practice, including plaintiff-side consumer law, disability rights, housing, and nonprofit and land use law.

Ms. Brennan earned her bachelor's degree from the University of California at Los Angeles (UCLA), and her J.D. from the UCLA School of Law, with an emphasis in public interest law and policy. Prior to pursuing her J.D., Ms. Brennan was deeply involved in public interest work, including community economic development, environmental justice, youth organizing, music and art advocacy, and nonprofit management. As part of this work, Ms. Brennan co-founded two nonprofit organizations, focused on educational equity and community development, respectively.

Ms. Brennan currently sits on the Advisory Board of Think Dignity, a San Diego-based nonprofit organization dedicated to finding policy-based solutions to homelessness. Ms. Brennan is an avid supporter of music and arts, especially in education. A long-time advocate for children and youth, Ms. Brennan will always lend a hand to a young person in need.

**Lyn Corbett, Director of Governance and Community Programs, The Nonprofit Institute, University of San Diego**

Lyn Corbett is the President of The Pivotal Group Consultants Inc., a California-based consulting firm providing organizational development and executive coaching services to nonprofit organizations across the country. Professor Corbett has dedicated his career to strengthening organizations to help build and sustain healthy communities. His professional interests have consistently focused on addressing health disparities and helping corporations, foundations, and non-profit organizations allocate resources to target the needs of underrepresented groups. Professor Corbett is an Adjunct Professor at the University of San Diego, School of Leadership and Education Sciences, where he teaches graduate level courses on governance, leadership, and strategy. Lyn holds a Masters of Arts degree in Public Administration with an emphasis in Non-Profit Management from New York University and is pursuing a Doctoral Degree in Leadership Studies at the University of San Diego. He is a Certified Governance Trainer with BoardSource, a Leadership Challenge Certified Facilitator, an Everything DiSC Workplace Certified Facilitator and a member of the International Coaching Federation.

**Jennifer Cosio, MSW, PPSC, Executive Director, Consensus Organizing Center**

Ms. Jennifer Cosio holds a Bachelor's of Arts degree in Social, and a Master of Social Work with a Pupil Personnel Services Credential. Ms. Cosio has been working at the Consensus Organizing Center since 2008 and became the Executive Director in 2015. She has over a decade of grant writing, community organizing, and program development experience. Ms. Cosio is also a lecturer and Undergraduate Advisor in the School of Social Work at SDSU. Finally, Ms. Cosio is a SDSU Faculty-In-Residence where she lives on campus with her family, and utilizes her social work and community organizing skills to develop and implement programming for students in the residential community to create a sense of belonging and connectedness to the university.

**Rick Dahlseid**, Nonprofit Division Lead, Pro Back Office, LLC

A Certified Public Accountant with a Master's Degree in Taxation, Rick is a financial expert by trade. His lead-servant perspective and warm personality give him an advantage in perfecting corporate vision and financial operations in order to ensure operational efficiencies. Rick enjoys sharing his ideation strength to plan and introduce enhanced operational and cost control initiatives to drive greater social awareness and mission impact. Rick has served as a leader, mentor, trusted advisor, and proponent of positive, productive organizational change to many types and sizes of organizations. Rick has unique expertise in the nonprofit area and has served in the Chief Financial Officer position for the past 15 years in the areas of healthcare, human services, environmental, children's initiatives, armed services, mental health, and affordable housing. Rick is also an instructor with the University of San Diego and the Nonprofit Academy, an award-winning partnership between the City of San Diego and The Nonprofit Institute at the University of San Diego.

Rick is a member of Financial Executives International, Financial Executive Networking Group, and the CFO Roundtable. He is active in his church and enjoys exploring San Diego along with his wife Denise, of 39 years. They also enjoy spending time with their 4 adult children and 3 grandchildren.

**Laura Deitrick**, PhD, Associate Director, The Nonprofit Institute, University of San Diego

Dr. Laura Deitrick serves as the Associate Director of The Nonprofit Institute at the University of San Diego. She has been a nonprofit executive director, board member, management consultant, and researcher on major nonprofit trends. Her research has led to important reports on nonprofit ethics, nonprofits and public education, nonprofit human resource practices, executive transition, the economics of San Diego's nonprofit sector, nonprofit public confidence, and regional grant making. In her role, Dr. Deitrick oversees graduate programs, leadership development initiatives, and the work of the Caster Family Center for Nonprofit and Philanthropic Research. Under her direction, the Caster Center's work is focused on research, evaluation, and understanding the economic landscape of the nonprofit and philanthropic sector in relationship to the broader economy. Dr. Deitrick is the director of USD's Nonprofit Leadership and Management master's program where she teaches nonprofit research methods, program design, and evaluation. She also serves as an adjunct faculty member at the University of California San Diego. She is the co-author of *Cases in Nonprofit Management: A Hands-On Approach to Problem Solving*, recently released by Sage publications.

**May L. Harris**, Founder & Managing Attorney, For Purpose Law Group

Ms. Harris graduated from the University Of San Diego School Of Law in 2000, and began her legal career at a large biotech company before transitioning to serving as the Executive Director of a nonprofit organization that raised funds for socio-economically disadvantaged charter schools. In that role, Ms. Harris raised more than \$2.5 million in funding for the services the nonprofit provided. Ms. Harris returned to the University of San Diego and earned her Master of Arts degree in Nonprofit Leadership and Management in 2010.

**Karen Henken**, Professor of Practice, Social Innovation and Entrepreneurship, Kroc School, University of San Diego

Ms. Henken's work focuses on fostering social impact and system change through social innovation and entrepreneurship. She teaches core courses in the Master of Arts in Social Innovation. She works with regional and global social enterprises to help them advance their success through sustainable business models and serves on several boards. Ms. Henken served as the founder and principal of Henken & Associates, helping businesses and nonprofits develop market opportunities, partnerships, growth strategies and sustainable revenue models to expand their impact. She spent 20 years in Silicon Valley as an executive in high technology management. She holds an MBA from Stanford Graduate School of Business.

**Zachary Green**, PhD, Professor of Practice, Department of Leadership Studies, University of San Diego

Zachary Gabriel Green is a Professor of Practice in the Department of Leadership Studies at the University of San Diego. Dr. Green is trained as a clinical psychologist and specializes in systems analysis and strategy, organizational transformation, negotiations of identity based-conflicts, leadership development, and crisis intervention. He coaches, consults, and conducts workshops and training sessions for numerous organizations, educational institutions, public advocacy groups, and government agencies, including The World Bank, Brookings Institution, Microsoft, the National Children's Medical Center, and the National Laboratories at Los Alamos (NM).

**Antonio Jimenez-Luque**, PhD, Professor of Practice, Department of Leadership Studies, University of San Diego

Dr. Antonio Jimenez-Luque's work explores how cultural, social, and historical perspectives influence conceptualizations and practice of leadership understood as a relational process of mobilization, emancipation, and social change. At the intersection of critical theory and intercultural studies, his research topics are (1) organizational culture and change; (2) leadership and framing for sense/meaning-making; and (3) critical interculturality and global social justice. From 2004-2013, Dr. Jimenez-Luque was the Coordinator for the International Cooperation for Development at the University of Barcelona Solidarity Foundation. He designed and implemented projects on topics related with human development, peace-building, human rights, and critical interculturality with local governments, universities, grassroots organizations, and social movements in Algeria, DR Congo, Vietnam, Colombia, and Bolivia, among other countries. In 2014, Dr. Jimenez-Luque moved to United States where he worked at Gonzaga University for the Associate Vice-President for Equity, Diversity, and Inclusion as Intercultural Research Associate, and taught a variety of classes including Leading Across Cultures, Democracy and Human Rights, and Latin American Politics.

**Pat Libby**, CEO and Consultant, Pat Libby Consulting

Pat Libby is a popular speaker, writer, and change management consultant working exclusively with nonprofits and philanthropies. Her firm transforms organizations by re-engineering governance and operating structures; transitioning and recruiting executives; and by facilitating data-driven strategic thinking and planning. Pat's vision and work emanates from the kaleidoscope of her experiences as a long-time nonprofit CEO, academic, board member, and consultant to innumerable organizations. Pat founded and led USD's Nonprofit Institute from 2001 until 2015. She is author of *The Lobbying Strategy Handbook*, (Sage 2012) and, with Laura Deitrick, *Cases in Nonprofit Management* (Sage 2017). You can connect with Pat on twitter @PJLibby, or read her blog at patlibby.com.

**Jocelyn Maggard**, Business Development Specialist, City of San Diego Economic Development

Jocelyn is a business development specialist in the Economic Development Department Business Expansion, Attraction and Retention division. Joining the City in 2017, she is a project manager for several small business programs including, the Storefront Improvement Program, the Business Walk Program and the OpenCounter zoning and permit portal. She has executed numerous nonprofit contracts for the Small Business Enhancement Program Microdistrict grant. She serves as the liaison to the boards of several business association nonprofits throughout the City. Jocelyn developed her passion for local government as a journalist and has also worked on political campaigns and in the nonprofit sector. Jocelyn holds a Master of Public Administration degree from San Diego State University and a Bachelor of Arts Degree in English from Point Loma Nazarene University. In addition, Jocelyn completed the Leaders 2020 & Young Nonprofit Professionals Network (YNPN) Nonprofit Leadership Program in 2016.

**Jasmine Mallen**, Grants and Contract Analyst, City of San Diego Council Administration

Jasmine Mallen serves the City of San Diego through her role as Grants and Contracts Analyst in which she aids Council Offices in the annual allocation of funds to over a hundred local nonprofit organizations and public agencies that provide critical programs and services to San Diego residents. Before this role, she served as an intern with Council Districts 4 and 9, which include some of the City's most culturally diverse and underrepresented neighborhoods. Throughout her professional and educational career, Jasmine's interests have included urban displacement, low-income neighborhood identity, community development and planning, local immigration, and exploring government's impact on society. Jasmine is a first-generation college graduate and holds a Bachelor of Arts in Sociology from the University of San Diego and a Master of Public Administration from San Diego State's School of Public Affairs

**Atilano Moran**, Community Development Project Manager, City of San Diego Economic Development

A native San Diegan, Atilano joined the City of San Diego in October 2016. He is currently a Community Development Project Manager for the Economic Development Department, primarily responsible for managing multiple Community Development Block Grant (CDBG) nonprofit projects and ensuring compliance with budget and reporting requirements by providing technical assistance from implementation through closeout. Prior to joining the Economic Development Department, Atilano worked as an Associate Management Analyst with the Purchasing & Contracting Department in its Equal Opportunity Contracting Program. His focus

was attending preconstruction meetings to advise contractors and staff of applicable prevailing wage and equal opportunity contracting provisions and reviewing monthly employment and invoice reports. Before his time with the City, Atilano worked for the County of Riverside Department of Public Social Services doing community outreach for various assistance programs related to employment, food and nutrition, and pediatric healthcare. In addition, his focus was developing marketing and social media campaigns and organizing events. Atilano holds a master's degree in public administration from California Baptist University and a bachelor's degree in business marketing from the University of Phoenix.

**Lydia Moreno**, Deputy Director, Economic Development Department, City of San Diego

Lydia Moreno is the Economic Development Department Deputy Director for the City of San Diego. She is responsible for overseeing three divisions consisting of 45 professional staff, the Business Expansion, Attraction and Retention (BEAR) Division, the Community Development Division, and the San Diego Promise Zone. She has over 35 years of experience working for the City of San Diego of which 25 years are with the Economic Development Department.

During Lydia's tenure with the Economic Development Department, she has implemented various economic development programs including the State of California Enterprise Zone, the Federal Foreign Trade Zone and Renewal Communities Programs, and the City's Business Loan Program. She was also instrumental in expanding some of these programs to other cities fostering regional economic growth and collaboration. As the Deputy Director, she has worked with her teams to develop and implement new programs which continue to support regional and bi-national economic activities and inclusive economic growth. In FY2017 & FY2018, new department programs were implemented or revised which expanded the support for non-profits to assist the City accomplish its goals through programs such as the Non-Profit Academy, the San Diego Promise Zone, Capacity Building Grants, Economic Development & Tourism Support, Citywide Economic Development Grants, and Community Development Block Grants. As a result, the Department has seen an average annual increase of about 20% in non-profit organizations applying for economic and community development grants.

Lydia is a graduate of San Diego State University, *Go AZTECS!* She is originally from the Imperial Valley and decided to make San Diego her home after graduating from SDSU. She has been married for 34 years and has three (3) sons, a talented daughter-in-law and two (2) beautiful granddaughters. She enjoys traveling, reading, watching baseball and is a faithful Padres fan.

**Valerie Nash**, Owner, Nash & Associates

Valerie Nash has provided consulting services to San Diego non-profits, government agencies, foundations and cross sector collaborations for more than 20 years. Her mission is to support positive social change by helping her client's design, implement, and evaluate quality programs that meet identified community needs. One of Ms. Nash's core competencies is proposal writing and in the past five years alone she has secured more than \$50 million in competitive funding. Current clients include County of San Diego Health and Human Services Agency, San Francisco Adult Probation Department, San Diego Grantmakers, San Diego Youth Services, and San Diego Unified School District. She has taught graduate and undergraduate courses in grant writing,

program evaluation, and community development. She completed postgraduate studies in education at Oxford University, England and has a Master's degree in psychology from Boston College. Ms. Nash currently lives in British Columbia, Canada with her husband and two children, but comes back to San Diego as often as she can.

**Jessica Robinson, MSW, Vice President, Student Services at Cuyamaca College**

Dr. Jessica Robinson holds a Bachelor of Arts degree in Social Work, a Master of Social Work degree with an administration concentration, and a Doctor of Education degree in educational leadership. Dr. Robinson has an impressive 17-year history in higher education with positions held in both student and academic affairs and is known for her work with creating a highly successful college-going program for youth in foster care. Currently, Dr. Robinson serves as the Vice President of Student Services at Cuyamaca College.

**Colton C. Strawser, MS, CFRE, Doctoral Research Assistant, The Nonprofit Institute, University of San Diego**

Colton C. Strawser is a Doctoral Research Assistant in The Nonprofit Institute and a doctoral student in the Ph.D. in Leadership Studies program concentrating in Nonprofit & Philanthropic Leadership. He has held various positions in the nonprofit sector including director of marketing/fundraising, director of development, and executive director. His research concentrations include foundation and nonprofit leadership, organizational capacity building, service-learning, civic engagement, youth philanthropy, and philanthropic education in both Pre-K-12 and higher education. In addition, Colton is the President of Colton Strawser Consulting, a full-service consulting firm that empowers nonprofit organizations, foundations, and other groups seeking to change the world. Colton holds a bachelor of arts in Philanthropic Studies from the Indiana University Lilly Family School of Philanthropy and master's degrees in Higher Education Administration and Nonprofit Management & Philanthropy from Bay Path University. He is both a Certified Fund Raising Executive (CFRE) and Certified Nonprofit Professional (CNP). In addition, Colton is an AFP Master Trainer and a BoardSource trained consultant.

**Ryan Kyung Mo Taylor, Esq., MBA, Associate Attorney, For Purpose Law Group**

Ryan Kyung Mo Taylor is an Associate Attorney at For Purpose Law Group. He holds a J.D. from the University of San Diego, School of Law, as well as an MBA from the University's School of Business (both class of '18). He is also an alumnus from Westmont College in Santa Barbara, where he graduated with a degree in Social Sciences, emphasis in Sociology and Economics (class of '09).

While pursuing his graduate studies, Ryan balanced his academic education with practical experience in both the law and business management. He has assisted attorneys in advising both corporate and nonprofit clients, while also gaining experience in sales, marketing, and

compliance. His diverse background allows him to collaborate on a wide variety of issues and projects.

Ryan maintains an avid interest in new venture management and social enterprise, something he focuses upon at For Purpose Law Group. He thrives in supporting entrepreneurs to develop their business and their cause.

**LaTisha Thomas**, Community Development Specialist, City of San Diego Economic Development Department

Ms. Thomas has worked with the City of San Diego for 29 years. She has professional experience negotiating, implementing, administering and managing complex community development projects, contracts and programs within the Community Development Division. Projects include: Community and Economic Development, Public Services, Microenterprise Assistance, Minor Residential Rehabilitation and Capital Improvement projects funded with Community Development Block Grant (CDBG), awarded by the federal Department of Housing and Urban Development (HUD). She previously managed the overall operation and implementation of program development for the City of San Diego Summer Youthforce Program, Youth at Work, Hire-A-Youth and collaborative programs. Currently, La Tisha manages the coordination and oversight of grant programs and agreement administration with non-profit agencies utilizing Transient Occupancy Tax (TOT) and Small Business Enhancement Program (SBEP) funds within the Business Expansion Attraction and Retention Division of the Economic Development Department. Ms. Thomas holds a Bachelor of Science degree in Criminal Justice Administration from San Diego State University.

**Courtney Thomson**, Council Grants Coordinator, City of San Diego Council Administration

Courtney Thomson serves as the Grants Coordinator/Contract Administrator for the San Diego City Council, helping manage their Community Projects, Programs and Services (CPPS) and Arts, Culture and Community Festivals (ACCF) Funding Programs. She leads the overall implementation of the grant cycles, connects due diligence reviews of all grants, provides administrative support to City Council staff, and ensures City department contracting requirements are met. In Fiscal Year 2017, she executed over 75 contracts in value up to \$130,000, processing over 1.5 million dollars in grant funding. Prior to joining the Council Administration team, Ms. Thomson worked as Council Representative and Policy Advisor to former Council President Todd Gloria, where she was responsible for policy related to Community Development Block Grants and the CPPS and ACCF Funding Programs. She also organized special projects supporting District non-profit organizations, helping him to reach his philanthropic goals and maintain positive community relations. Courtney holds a Bachelor's Degree in Liberal Studies from UC Riverside, a Professional Clear Multiple Subject Teaching Credential with CLAD from California State University, San Marcos and a Professional Grant Writing Certificate from San Diego State University.

**Mary Tovella Dowling**, Partner, For Purpose Law Group



Ms. Dowling holds a B.S., cum laude, in Business Management from the W.P. Carey School of Business at Arizona State University, and a J.D., cum laude, from Thomas Jefferson School of Law. Ms. Dowling represents a variety of public charities, private foundations, and other nonprofit organizations, including museums, religious and faith-based organizations, social welfare organizations, sports-based organizations, business leagues, educational institutions and social clubs. Her practice focuses on providing full service representation and outside general counsel services advising on a full range of nonprofit and tax exempt legal issues.

**Gail Wingfield**, Senior Arts and Culture Funding Manager, City of San Diego Commission for Arts and Culture

Gail Wingfield's extensive career in the nonprofit sector includes arts administration, operations management, and development. As the senior arts and culture funding manager at the City of San Diego's Commission for Arts and Culture, she leads the City's arts and culture funding program to produce excellent, inclusive and relevant arts and culture services for diverse and broad audiences of San Diego's residents, visitors and investors. She also manages the City's contracts with nonprofits for the production of arts and culture services and is lead analyst on development and control of arts and culture's annual budget. Ms. Wingfield received a B.A. in Performing Arts from the University of California, Los Angeles, and an M.A. in Nonprofit Leadership and Management from the University of San Diego. As a Certified Nonprofit Professional, Ms. Wingfield has consulted with nonprofits throughout San Diego, assisting with board governance, strategic planning, financial assessment, fundraising, grant writing, and marketing.

