



### **Alicia Quinn**

#### **Vice President of New Business Development, United Way of San Diego County**

With more than 17 years of private and nonprofit experience, Alicia is passionate about leveraging resources from both sectors to fuel social innovation. In her role at United Way of San Diego, Alicia is responsible for cultivating new business initiatives, including corporate social responsibility opportunities for local businesses, and leads marketing initiatives to elevate the impact and reach of the organization. She also teaches a graduate course in Social Enterprise at the University of San Diego's School of Leadership and Education Sciences. Previously, Alicia was Director of Programs for Mission Edge, where she designed and implemented a CSR program for Qualcomm to engage employees in skills-based volunteering in the nonprofit sector. She also implemented a social enterprise accelerator for nonprofit organizations to develop, test, and launch revenue-generating lines of business. Alicia was Director of Programs and Development for the Accion U.S. Network, a microfinance lender that provides access to capital for underserved entrepreneurs, and Director of Programs for San Diego Social Venture Partners, which helps philanthropists realize greater social impact through their collaborative investments of time and treasure in local nonprofits.

She started her career as an analyst at JPMorgan Chase then served as Director of Administration at Howard Head Sports Medicine in Vail, CO. Alicia holds a BS in Business Administration from Georgetown University and a MS in Social Work / Social Enterprise Administration from Columbia University. She serves on the boards of Barrio Logan College Institute and the Southern California Immigration Project, the advisory board for the Center of Peace and Commerce at USD, and leadership council of Women Give San Diego. She was a finalist for the San Diego Business Journal's "2018 SD Next Top Business Leaders Under 40" award and San Diego Magazine's 2018 Celebrating Women award.



### **Andrea Guerrero**

#### **Executive Director, Alliance San Diego**

Andrea Guerrero is the executive director of Alliance San Diego, a community empowerment organization that is building a more inclusive democracy so that all people can achieve their full potential. From changes in public policy to changes in public discourse, she and her colleagues are mobilizing immigrants and other affected community members to bring about change from San Diego to DC. Before joining Alliance San Diego, Ms. Guerrero was the Field & Policy Director of the ACLU of San Diego & Imperial Counties. Prior to that, she practiced immigration law before administrative and federal courts. She is a graduate of UC Berkeley Law School (J.D. 1999), University of Texas LBJ School of Public Affairs (M.A. 1994), and Stanford University (B.A. 1992). Originally from Mexico City, Ms. Guerrero views the world from a binational, bicultural, and bilingual lens. She has dedicated her professional life to protecting civil rights and advancing social justice, especially in the borderlands. She is a fierce advocate, a compassionate leader, and a recognized expert on immigration issues. She invites you to view her TEDx talk, "Immigration Reform: A Chance for a Better America."



### **Anna Diaz**

#### **Lead Advisor, Dowling and Yahnke Wealth Advisors**

Anna Diaz is a Lead Advisor at Dowling & Yahnke Wealth Advisors. Anna began her career in the private banking and wealth management industry in 1997. Prior to joining Dowling & Yahnke, she was a Senior Vice President and Private Client Advisor at a national private wealth advisory institution for 16 years. Anna holds the designation of CERTIFIED FINANCIAL PLANNERTM (CFP®) and a Certificate in Investment Strategies and Portfolio Management from Wharton. She completed her undergraduate work in Financial Services at San Diego State University. She was born and raised in San Diego, and enjoys outdoor activities such as running or swimming in her spare time. Anna lives in Carmel Valley with her husband and their two children. Dowling & Yahnke offers time-tested, objective financial planning advice and investment management services designed for the financial health and personal freedom of its clients. Located in San Diego, California, the Firm manages approximately \$4 billion for more than 1,000 clients, primarily individuals, families, and nonprofit organizations.



### **Anne McEnany**

#### **President and CEO, International Community Foundation**

Anne McEnany assumed the role of President & CEO of the International Community Foundation in November 2014, and is responsible for overseeing ICF's grantmaking portfolios and special initiatives. In FY2018, ICF granted nearly 11 million dollars to over 270 local nonprofit organizations in Mexico and 9 countries in Latin America. Prior to assuming the role of President & CEO, Anne managed the organization's \$5 million Environment & Conservation portfolio, as well as multiple special initiatives, including many related to the San Diego-Tijuana border such as a cross-border initiative to control erosion and manage stormwater in Los Laureles Canyon in Tijuana and a 2015 survey and publication about corporate philanthropy in the border region. Anne has an M.S. in Applied International Development from Tulane University and a B.A. in Latin American Studies from the University of Virginia. She is the Co-Editor of, "Baja California Sur's Community Based Needs and Opportunities" and "Blurred Borders: Transboundary Issues and Solutions in the San Diego/Tijuana Border Region." Anne also co-authored the "Retiring Responsibly in Mexico" research series in 2010-2011.



### **Anthony Valeri**

#### **CFA, Investment Management Director of Wealth and Fiduciary Services, Zions N.A.**

Anthony is the Director of Investment Management and chairs the firm's Investment Committee. He is responsible for all aspects of investment management including portfolio construction, due diligence, asset allocation, investment analysis, and investment communications. In addition, he also serves as portfolio manager and helps manage select high-net-worth client accounts. Prior to joining the firm, Anthony was a Senior Vice President and investment strategist at LPL Financial where he was responsible for developing and articulating investment strategy. He has appeared in print, radio, and TV media outlets such as Bloomberg, CNBC, Fox Business News, Reuters, and Dow Jones. Anthony is a Chartered Financial Analyst (CFA) and received a Bachelor of Arts degree in Quantitative Economics & Decision Sciences from the University of California at San Diego. He has 27 years of experience in the financial industry.



### **Antonio Jimenez-Luque**

**Assistant Professor, School of Leadership and Education Sciences, University of San Diego**

Dr. Antonio Jimenez-Luque's work, broadly speaking, 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, identity 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 the 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. Since 2018, he is teaching at the University of San Diego and developing his research agenda on issues of public leadership and how to develop civic leaders.



### **Beth Branning**

**CEO, Branning Strategies**

Beth Branning is a strategic planning and executive facilitation consultant focusing on nonprofit organizations and associations. She is the former Chief Strategy Officer at San Diego Zoo Global, and has helped over 100 groups to create their own strategic plans--including the American Alliance of Museums, KPBS, the Ocean Institute, and the wildlife on the continent of Australia.



### **Beth Sirull**

**President and CEO, Jewish Community Foundation of San Diego**

Beth Sirull is a mission-driven, pragmatic leader with the demonstrated ability to marshal both financial capital and human resources to deliver exceptional results on time and within budget. In March 2017, Beth became the President and CEO of the Jewish Community Foundation of San Diego (JCFSD) which manages over \$570 million in philanthropic assets for organizations and individuals. JCFSD recently became the first Jewish Community Foundation in the United States to offer its donors an impact investment option aligned with Jewish values across multiple asset classes. Prior to joining JCFSD, Beth served as President/CEO of Pacific Community Ventures (PCV), a combined for-profit/nonprofit community development organization that leverages human and financial capital investment to create jobs and economic opportunities in low-income communities. Beth led PCV through a period of significant growth, doubling revenues and increasing net assets by over 50%. The organization launched a small business loan fund to complement its equity



funds and built a global reputation as a thought leader, advisor and knowledge manager in impact investing. Previously, Beth worked in several marketing and strategy positions in financial services. Beth received the 2015 James Irvine Foundation California Leadership Award, recognizing Californians who are advancing innovative, proven and replicable solutions to critical issues facing the state. She was named to Forbes list of 30 Top Social Entrepreneurs in 2012 and to the San Francisco Business Time list of Most Influential Women in Business in 2013. She is the author of *Creating Your Life Collage: Strategies for Solving the Work/Life Dilemma* (©Random House, 2000). Beth holds an undergraduate degree from Brandeis University, an MBA from Boston University and an MPP from the Goldman School of Public Policy at the University of California, Berkeley.



### **Beverly Codallos**

**Director of Philanthropy, Health Center Partners of Southern California**

Beverly is the Director of Philanthropy at Health Center Partners (HCP) where she leads a new initiative to build infrastructure, collaboration and focus on philanthropy across HCP and its community health centers. Beverly has 20+ years in the fields of education, nonprofit, faith, health care, and philanthropy with a passion for helping nonprofits increase capacity through strategy and operations excellence.



### **Bharat Mohan**

**Co-Founder, Systems 2 Leadership**

Dr. Bharat Mohan has a strong background in designing large-scale research studies, applying both quantitative and qualitative methods to address research questions, and effectively communicating data-driven recommendations based on research findings. In addition to his research background, he has served as a consultant on a number of projects related to culture. Bharat is the co-founder of System 2 Leadership Consulting, a management-consulting firm providing a wide range of human resources services, including people analytics, leadership development training, organizational development strategy, and program evaluations.



**Bina M. Patel**  
**CEO, Saathi Impact**

Bina has worked for more than 20 years to advance equity, justice, and belonging. She has extensive experience building and leading collaborative efforts and delights in seeing big ideas take shape in communities. Bina has led strategic initiatives to help communities transform themselves through innovative, inclusive, and sustainable efforts in the areas of asset building, public health, civic engagement, and economic development. Her projects have included a revitalization of the community-based small business lending market post-2008 recession, an actionable cross-sector civic plan to advance gender equity, mobilizing residents to collaborate on developing solutions to persistent community challenges, and advancing racial equity through addressing structural racism. She served as Deputy Chief of Staff in City Hall in Chicago, where she was responsible for overseeing a portfolio of programs and policies amounting to over \$1 billion in the area of human capital, human services, public health, and community development. Her career spans experience in direct service with community-based organizations, philanthropy, and public policy. She earned an M.S. in Social Protection Finance (Public Finance & Social Policy) from the University of Maastricht, the Netherlands, where her concentration was on Economic and Community Development. She also earned an M.A. from the University of Denver in International Studies with a concentration on Sustainable Development and Poverty Alleviation. Bina was selected to participate with the PLACES fellowship (2012) through The Funders' Network, where she engaged with community members and colleagues from across the country to dive into racial, social, and economic justice issues. She regularly invests in continued learning in equity, strategy, and community empowerment. Bina is a keynote speaker, panelist, coach, and facilitator.



**Brian Yacker**  
**CPA, Managing Partner, YH Advisors**

Brian has almost 26 years of tax, legal, and accounting experience in the exempt organizations area. Areas of exempt organization consultation, which Brian possesses expertise, include public support test calculations and planning, preparation of reasonable compensation rebuttable presumption binders and Reasonable Compensation Studies, governance best practices consultation, recommendations regarding effective bylaws, conducting of EO Governance Check-Ups, compliance with the §501(h) lobbying safe harbor, proper functional expense allocations, maximizing charity watchdog ratings, preparation of federal and state Tax Exemption Applications, conducting of unrelated business income revenue stream studies, preparing state charitable solicitation registrations and the proper internal and external reporting of special event fundraisers. Brian is currently an adjunct professor for the University of California Irvine, teaching the Nonprofit Accounting course in the Master of Professional Accountancy program. Additionally, Brian serves on the Board of Directors for California Rural Legal Assistance (for which he serves on the Audit Committee and Executive Committee). Finally, Brian serves on the AICPA's EO Tax Technical Resource Panel and the AICPA Nonprofit Advisory Council. Brian earned his Bachelors degree in Finance/Marketing from the University of Virginia and his Juris Doctor from the Indiana University School of Law (Bloomington). Personal interests include hiking and camping, sports memorabilia collecting, playing fantasy sports, Asian cooking and spending time with his wife, two daughters, and son.



### **Carla Penha Vasconcelos**

**Ph.D. Candidate in Leadership Studies, Gonzaga University**

Carla is a Ph.D. candidate in Leadership Studies at Gonzaga University. Prior to coming to the United States, she worked in Barcelona as coordinator for International Masters and Undergraduate degrees, and as a researcher and practitioner on feminist and empowerment projects for migrant women and Spanish/Catalan communities. Carla also co-founded the Casa Iberoamericana de la Mujer en Barcelona (CIMB), a project she continues to collaborate on remotely. Carla's passion is working with community-based and educational organizations developing leadership, gender, diversity, immigration, and international projects and workshops. Carla is now working on applying her leadership knowledge and skills towards the development of Leadership research and workshops for Social Justice. Her dissertation research focuses on collaboration; social identities; intersectionality; power relations; and the processes of amplifying women's experiences, understandings, and voices in diverse communities.



### **Charles Dayton**

**Founder and President, ActionStrategy**

Charles Dayton is the Founder and President of ActionStrategy. Charles spent 13 years at Franklin Covey providing consulting support for organizations such as Federal Express and Ford Motor Company. In 2005, he founded ActionStrategy, a leadership and strategy development firm with an online strategy management system. During that time, he has worked with private and public sector organization such as FEMA, Indian Health Services and numerous tribal organizations. Charles has been a member of the city council for 10 years and board member for the Chamber of Commerce for over 15 years. He studied History at Brigham Young University and Public Administration in graduate school at the University of Utah. Charles is also a professional western artist and runs a small Wyoming dude ranch in the summer.



### **Christina Hastings**

**Director of Corporate Communications, Zovio**

For over 10 years, Christina Hastings has been a pivotal leader in the San Diego community. She continues to drive employee engagement through Zovio's Corporate Communications within the company and their subsidiaries – spearheading several strategic initiatives. While being a pillar within her company, she is active in the local community and remains dedicated to a variety of non-profit organizations. She keeps a full calendar by serving as the Committee Chair for Women United of the United Way of San Diego County, volunteering with Girl Scouts of San Diego County, and as a LEAD San Diego IMPACT graduate of the Class of 2012. We also applaud her nomination as a 2018 finalist for *San Diego Magazine's* Celebrating Women awards! Christina is a Southern California native and has received her bachelor's degree from Point Loma Nazarene University. As the furthest grandkid to travel away from her family's Los Angeles roots, she describes San Diego as a big city with small-town vibes – you never know who you already know.



### **Christy Wilson**

**President and CEO, Ranch Santa Fe Foundation**

Christy Wilson is the President & CEO of the Rancho Santa Fe Foundation, having served in this role since 1997. As the head of this ever-growing organization, Ms. Wilson is charged with leading the development function and creating philanthropic and leadership opportunities in the San Diego County region. Notable organizational accomplishments during her tenure include the creation of the Rancho Santa Fe Women's Fund in 2004 which since inception has granted more than \$3.7 million to more than 100 different nonprofit organizations. In 2007, the Foundation launched The Patriots Connection, focused on raising awareness of the needs of the military in San Diego County. Other initiatives include North County Senior Connections, a three-year program to address food insecurity and isolation in vulnerable seniors in North San Diego County, a large initiative focused on workforce development for under-served youth in San Diego County, and this year's focus on the prevention of human trafficking in San Diego County. Ms. Wilson is a member of the Association of Fundraising Professionals, North County Philanthropy Council, San Diego Grantmakers and the national Partnership for Philanthropic Planning. She serves on the Advisory Board for The Nonprofit Institute at the University of San Diego and on the Executive Committee of the Alliance for Regional Solutions. Also, she is a Trustee of The Bishop's School. Christy received her B.S. from the University of California, Davis and her M.A. from the University of San Diego, where she is currently a Professor of Practice in the School of Leadership and Education Sciences.



### **Cole Kinney**

**Senior Vice President of Development, CalNonprofits Insurance Services**

Cole Kinney has over 25 years of nonprofit insurance experience, and recently joined the CalNonprofits Insurance Services team as the Senior Vice President of Development. Cole is a dynamic, passionate supporter of nonprofits and helping them protect their mission through risk management and insurance. He was instrumental in developing special insurance programs for various segments of the nonprofit community at his previous employers. He currently works with carriers to develop new programs for CalNonprofits members and specific nonprofit segments.



### **Colleen Lazanich**

**CEO, CalNonprofits Insurance Services**

Colleen Lazanich is the CEO of CalNonprofits Insurance Services, the only social enterprise insurance brokerage in California. & CalNonprofits Insurance Services is a full-service insurance brokerage providing employee benefits and property/casualty insurance to more than 1,200 California nonprofits. CalNonprofits Insurance Services is a subsidiary of CalNonprofits (California Association of Nonprofits).





### **Colton C. Strawser**

**Doctoral Research Assistant, The Nonprofit Institute, University of San Diego**

Colton C. Strawser is a doctoral research assistant in The Nonprofit Institute at the University of San Diego where he is also a student in the Ph.D. in Leadership Studies program. His research interests include the community leadership roles of community foundations, community engagement within higher education, and effective pedagogy within the disciplines of nonprofit management and philanthropic studies. His mission is to empower organizations to create change through his teaching, scholarship, and engagement.



### **Daniel Ladd**

**Vice President, Investment Management Division, Goldman Sachs**

Daniel joined the Investment Strategy Group in November 2015 as a member of the strategic asset allocation team. Prior to joining, he worked for two years on the Market Risk Analysis team in the Finance division, focusing on Emerging Markets risk. Daniel received his MS in Applied Mathematics and Statistics (2013) as well as a BA in Economics and Mathematics (2011) from the University of California, Santa Cruz.



### **David O'Brien**

**Author**

David J. O'Brien enjoyed a career in the for-profit sector over a span of 40+ years, with broad-based experience in multi-industry corporate development, finance, and management of organizations ranging from Fortune 500 conglomerates to startups. David has served as Board Chair, Committee Chairs, and Director/Trustee of numerous nonprofits in diverse fields including education, international health NGO's, social services, and the arts. He resides in rural San Diego County with his wife, Dr. Paula Cordeiro, and when not active in the nonprofit community, enjoys sailing Colibi, his 60-year sloop, cooking, oil painting, and accompanying Paula on her travels working with NGO's in Africa, & Central/South America. He currently serves on the boards of The International Community Foundation and the San Diego Maritime Museum. David & Matt's book, *Building Smart Nonprofits: Roadmap For Mission Success*, will be published by Rowman & Littlefield this July.





### **Elissa Haddad**

#### **Co-Founder, Systems 2 Leadership**

Dr. Elissa Haddad is the co-founder of System 2 Leadership Consulting, specializing in leadership development and training. Elissa's experience encompasses a strong teaching background, particularly in the context of Culture and Leadership, and a wide range of consulting experience. Prior to pursuing her Ph.D., Elissa worked in the financial services industry and served four years in the United States Navy.



### **Ellen Waddell**

#### **Board Chair, San Diego Hunger Coalition**

Ellen Waddell is an archaeologist by trade and passion. Waddell has a particular interest in issues related to food security, refugee resettlement, landlord-tenant issues, homelessness and museum decolonization. In addition to serving as Director for the Moxie Foundation, Waddell works closely with several organizations that focus on local and global food systems. She serves on the board of the San Diego Hunger Coalition and is a founding member of San Diego Food Funders. She also enjoys wearing her archaeologist hat as a Vice-Chair of the board and volunteer at the San Diego Museum of Man.



### **Emily Young**

#### **Executive Director, The Nonprofit Institute, University of San Diego**

Dr. Emily Young is the executive director of The Nonprofit Institute. She has spent more than 20 years in various positions in philanthropy, as well as higher education. Prior to the University of San Diego, she served as vice president of community impact at The San Diego Foundation, where she was first hired to build its Environment Program in 2000. During her time at The San Diego Foundation, Dr. Young worked with numerous funders and community leaders to catalyze and facilitate regional and statewide collaboratives, developing and implementing grant-making programs around climate change, conservation and youth access to the outdoors, and clean air/water efforts in tribal and other disadvantaged communities. She also managed regional initiatives on arts and culture, civic engagement, education and youth development, and neighborhood revitalization, especially for underrepresented communities. Dr. Young received the 2011 Funder's Network for Smart Growth Nicholas P. Bollman Award for leaders who inspire through values and action, while the Climate Initiative she led received both the 2012 HUD Secretary's Award for Public-Private Partnerships and the City of San Diego's Climate Protection Champion Award. Prior to The San Diego Foundation, Emily was an assistant professor at the University of Arizona, where she taught courses on environment and society, geography, and Latin America. Dr. Young graduated from the University of Wisconsin-Madison with a double BA in Ibero-American Studies and Spanish, and an MS in geography. She received a Ph.D. in geography from the University of Texas at Austin.



### **George Ruotolo**

**Chair and CEO, Ruotolo Associates**

George C. Ruotolo, Jr., CFRE, Chair CEO of Ruotolo Associates, Inc., has been a professional fundraising and public relations executive since 1973. His expertise encompasses annual development, capital campaigns, planned giving, marketing and public relations programs for dioceses, churches, colleges, schools, hospitals, and social service organizations on local, regional and national levels. He has worked closely with religious, corporate and civic leadership, administrators, board members, volunteers and development officers. Mr. Ruotolo has served as Chair of the Giving Institute and is also a member of the board of the Giving USA Foundation, publishers of Giving USA (of which he is a former Chair). In addition, he is a former board member of the Association of Fundraising Professionals (AFP), and Immediate Past Chair of the Ramapo College of New Jersey Board of Trustees.



### **Hans Schmitz**

**Associate Professor, Leadership Studies, University of San Diego**

Hans Peter Schmitz is an Associate Professor of Leadership Studies at the University of San Diego. He is the co-founder of the Transnational NGO Initiative at the Maxwell School of Citizenship and Public Affairs/Syracuse University. His forthcoming book is titled *Between Power and Irrelevance. The Future of International NGOs*. His other research interests include digital activism, human rights advocacy, philanthropy, and global health issues.



### **Heather Milne Barger**

**Communications Consultant, Racial Justice Advocate**

Heather Milne Barger has served in executive and board member roles with San Diego nonprofits for more than 10 years. She is well-known for her comprehensive expertise in business initiatives that drive brand recognition, thought-leadership, client service, and revenue. Heather has a personal passion for racial justice and has taught workshops on the topic for the past two years. She received a certificate in nonprofit management from the University of San Diego and a B.A. from Scripps College in Los Angeles.



## **Jack Berkman**

**President and CEO, 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. This is the single highest honor bestowed upon members of the Public Relations Profession nationally and awarded to less than 5% of the qualified members of the Society Worldwide. Berkman was named, by the San Diego Press Club, as the 2018 PR Professional of the Year, receiving the coveted Andy Mace Award. He is an active member of The Rotary Club #33 since 1991. For the past five years, he has served as the Chairman of the Rotary 4-Way Speech Contest. Berkman is a Red Coat Life Member of the Holiday Bowl. He assists worthy philanthropic organizations around the country to raise money, by serving as a professional Auctioneer. He has raised over 3M for charities. The Gaslamp Quarter Association recognized his achievements with a prestigious Lamplighter Award. Berkman was honored with the prestigious Eva Irving Community Service Award, by the San Diego Chapter of the Public Relations Society of America (PRSA) for his exceptional community service, and contributions for over 35 years to the City of San Diego. The San Diego Business Journal acknowledged him as one of San Diego's Most Admired CEOs and is past President of the Board of Directors of the San Diego Film Commission. His hobbies include snow skiing, golf, world travel, dining and traveling to watch his Los Angeles Chargers.



## **Jacob Richards**

**Commercial Banker, Senior Vice-President, California Bank and Trust**

Jacob Richards is a Senior Vice-President with California Bank & Trust's Commercial Banking department and has been in the banking industry for over 20-years with the past 15-years as a Commercial Lender. His focus is on working with companies, non-profits, real estate investors, and affluent individuals with specialized banking services. Areas of expertise include working capital lines of credit, term loans, commercial real estate financing, cash management, and tax-exempt financings. Giving back to the community is an important part of his career and personal life. Mr. Richards currently serves as the Finance Chair on the Board for United Way of San Diego and on the Advisory Board for the San Diego Workforce Partnership.





### **Jacqueline Rossow**

**Principal, Jacqueline Consulting; Senior Consultant, Ruotolo Associates**

In Jacqueline's twenty-five-year philanthropy career she has served a wide variety of arts, educational, social service and faith-based organizations in the New York City and San Diego areas. Jacqueline has worked with board chairs and board members to advance organizations from both an internal staff perspective and the consultancy side. Her broad range of experience includes serving organizations from large flagship arts institutions like Carnegie Hall in New York City, to major Educational Institutions like St. John's University School of Law where she rose to the level of Assistant Dean for Development, as well as international and local social service nonprofits such as Burundi Friends International and La Colonia De Eden Gardens in San Diego. Jacqueline has been a presenter designing workshops for growing organizations at The Nonprofit Institute's Annual Nonprofit Governance Symposium and she lives in Encinitas with her husband Chris, and twelve-year-old daughter Colette.



### **Jason Emmons**

**Partner - IT Consulting Group, Moss Adams LLP**

Jason has consulted in the information technology field since 1996. He has experience in business development, internal controls design and implementation, Sarbanes-Oxley 404 implementation and attestation, data analysis, fraud identification, information protection consulting, project management, and hardware and software integration. He has led enterprise and IT risk assessment projects for companies of all sizes, for various purposes including pre- or post-acquisition due diligence, enterprise risk management, internal audit, and Sarbanes-Oxley compliance. Jason serves clients across multiple industries, including energy, life sciences, aerospace and defense, telecommunications, and technology. He is a regular guest speaker at the San Diego chapters of the Institute of Internal Auditors and ISACA as well as the University of California, San Diego on topics including selling, driving shareholder value, internal control rationalization, IT risk, and internal audit efficiency.



### **Jen Gilmore**

**CEO, Kitchens for Good**

As Kitchens for Good's CEO, Jennifer Gilmore brings her knowledge and experience establishing start-up nonprofits to the organization. Under her leadership, Kitchen for Good has been recognized as an award-winning social enterprise, an innovative solution to hunger and poverty, and has successfully expanded into three kitchens.



### **Jeromie Park**

**Vice President, Investment Management Division, Goldman Sachs**

Jeromie is an Advisor in the Los Angeles office. Jeromie joined Goldman Sachs in 2006 after receiving his MBA in Finance at the Wharton School of the University of Pennsylvania. Prior to Wharton, Jeromie helped establish Y-Merge.com, a fintech start-up which provided interactive corporate finance and M&A analytics to financial institutions and investment banks. Y-Merge.com was acquired by its strategic partner, SNL Financial, which then sold to New Mountain Capital. Before Y-Merge.com, Jeromie was an Investment Banking Analyst at Sandler O'Neill & Partners, a full-service investment bank providing merger advisory, capital raising, brokerage and research services to financial institutions. Jeromie earned an AB cum laude from Harvard University in 1998. He serves on the board of Mental Health Advocacy Services.



### **Jordan Shuler**

**Account Executive, Community Boost Consulting**

Jordan Shuler is an Account Executive at Community Boost Consulting, a digital marketing agency that directly services over 125 forward-thinking nonprofits. The Community Boost team is trusted by the Statue of Liberty-Ellis Island Foundation, the Trevor Project, The San Diego Foundation, the International Community Foundation, Natural High, North County Health Services and the United Way of San Diego.



### **Karen Henken**

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

Karen Henken's work focuses on fostering social impact and system change through social innovation and entrepreneurship. She teaches graduate courses and develops partnerships at the Kroc School and teaches and works with nonprofits across the San Diego region to help develop scalable models for systems change and new revenue opportunities. She also teaches workshops globally with leading universities, businesses and NGOs in Colombia, Vietnam and Brazil.



### **Kim Hunt**

**Adjunct Professor, Department of Learning and Teaching, University of San Diego**

Kim Hunt has been active in education and the nonprofit sector for more than 30 years. Kim is a Research Associate at the Nonprofit Institute at the University of San Diego (USD). Prior to joining USD, she worked with nonprofits as a business manager, volunteer, communications specialist, and budget analyst throughout the U.S. and Europe. She is passionate about working with nonprofit organizations that are focused on supporting military families and education. She has taught all age levels and has run reading programs at a variety of schools throughout the U.S. and Europe. She currently serves on the Coordinating Council for the San Diego Military Family Collaborative. Kim holds a BS in Economics with a concentration in developing nations from California Polytechnic University, San Luis Obispo and a MAED in Education with an emphasis on curriculum development from the University of Phoenix. Kim earned her Ph.D. in Leadership Studies with a specialization in Nonprofit and Philanthropic Leadership from the University of San Diego.



### **Krishna Kabra**

**Strategist and Storyteller**

Krishna Kabra is a strategist and storyteller. She has over 20yrs of experience in insights, innovation and marketing strategy in the corporate world. As part of two large agencies, she has worked on some of the world's largest brands including Coca Cola, Wrigley, Unilever, L'Oréal and many others. She holds a deep passion for entrepreneurship and understands what it takes to grow an organization - be it a startup or a multinational. Call it a personal renaissance or reinvention, she's actively embarking on a new chapter in her life and pivoting into the non-profit world, specifically conservation. As a British Indian who has lived around the world and traveled extensively, here's what 'floats her boat' as she says: behavioral sciences, design thinking (and all things innovation), impact investment, corporate social responsibility and wildlife conservation.



### **Laura Deitrick**

**Associate Director, The Nonprofit Institute; Department of Leadership Studies Program Director**

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





### **Leonard Perry**

**Associate Professor, Industrial & Systems Engineering, Shiley-Marcos School of Engineering, University of San Diego**

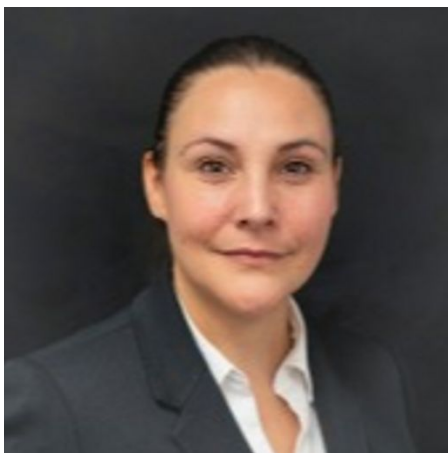
Leonard Perry, PhD, has research interests in the area of system improvement via quality improvement methods especially in the area of applied statistics, statistical process control, and design of experiments. Dr. Perry consults, instructs, and collaborates on quality improvement projects with representatives from biotech, health care, defense, and traditional manufacturing institutions. He has been an instructor for the Six Sigma Black Belt training at the Six Sigma Institute for three years. He is a UCSD Certified Six-Sigma Master Black-Belt and an ASQ Certified Quality Engineer.



### **Linda Spuck**

**Principal, Linda Spuck Consulting**

Linda Spuck is Principal of Linda Spuck Consulting, providing Effective, Actionable Advice to Maximize Philanthropy. She shares her passion for helping individuals, families and non-profit entities to find the most effective ways to achieve their mission through legacy planning, fundraising counsel, and strategic board governance services.



### **Lisa Galvez**

**Infrastructure Security Cybersecurity Manager, Moss Adams LLP**



### **Lorri Sulpizio**

**Director, Conscious Leadership Academy, The Nonprofit Institute, University of San Diego**

Dr. Lorri Sulpizio is the Director of the Conscious Leadership Academy at the University of San Diego, and the founder of the Center for Women's Leadership at USD. Dr. Sulpizio's leadership interests include 1) gender dynamics, specifically women, voice, and power; 2) application of group relations theory to the practice of leadership and building effective teams; 3) how authenticity and a balanced sense of self leads to effective leadership; 4) developing confidence, mental strength and team cohesion in athletes. Dr. Sulpizio created the Women in Higher Education Leadership Summit and the Cultivate Conscious Kids Program and is committed to creating and designing programs that meet the deeper needs of individuals and organizations. Dr. Sulpizio is a certified leadership coach and a certified practitioner in the Leadership Circle Profile, the Meyers-Briggs Type Indicator, DiSC, and Firo-B, and believes that using data is a useful first step in helping people begin to realize their leadership potential. Dr. Sulpizio was a board member with the New Children's Museum of San Diego, the California Community College Women's Basketball Association and the Fitness Advisory Council for San Diego Mesa College. She served as head women's basketball coach at San Diego Mesa College from 2001-2007 and coached at Cuyamaca College from 2008-2010. She is also the co-founder and principal consultant for Lotus Leadership Institute. Dr. Sulpizio has taught both graduate and undergraduate level courses in leadership, including Gender and Leadership, Women and Leadership, Integral Leadership, and Contemporary Issues in Leadership. She was an associate instructor in the USD Foundations of Coaching and Coaching and Mentoring Course. She has worked with a variety of companies and has done presentations and consulting projects for Qualcomm, Rady's Children's Hospital, Torrey Pines Bank, SDSU, UCSD, and several San Diego Schools. She has published chapters and articles on leadership topics in textbooks, journals, and popular press publications.



### **Lyn Corbett**

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

Lyn Corbett is currently a doctoral student in the Leadership Studies Program, specializing in Organizational Leadership and Consulting. He has dedicated his career to strengthening organizations to help build and sustain healthy communities. Lyn's professional and research interests have focused on addressing health disparities and helping corporations, foundations, and non-profit organizations allocate resources to target the needs of underrepresented communities. Lyn is also an adjunct professor, teaching LEAD 511 Strategic Planning and Positioning. In addition, Lyn is the President of The Pivotal Group Consultants, a consulting firm providing organizational development, research and evaluation, sustainability and strategic planning services. He is a member of the International Coaching Federation and a Certified Governance Trainer with BoardSource.



## **Mark Stuart**

### **President and CEO, The San Diego Foundation**

Mark Stuart is a fundraising and community-building professional with nearly 30 years of experience in all aspects of operations and leadership. As President and CEO of The San Diego Foundation, he reports to and collaborates with the Board of Governors and is responsible for developing and managing relationships with a wide range of stakeholders as well as for the operating health of The Foundation. Mark's career has been devoted to helping donors realize their hopes, dreams, and aspirations. Prior to joining The Foundation, Mark managed a staff of 64 and a budget of \$14 million at San Diego Zoo Global (SDZG), including development, membership, and government and community relations. Under his leadership, SDZG raised \$530 million in its first-ever comprehensive fundraising campaign. Mark also served as the founding President of the Foundation for San Diego Zoo Global. He worked with the Board of Directors to fuel the vision for highly impactful programs like San Diego Zoo Kids TV channel, Wild Heroes for military veterans, and Teacher Workshops in Conservation Science to increase science literacy across the U.S. He is also the founder of an industry-wide collaborative to increase capacity, data-sharing and best practices for accredited zoos and aquariums. Mark was Associate Dean of Development and Alumni Relations for the University of Pennsylvania School of Veterinary Medicine. During his tenure, the School raised \$100 million in a campaign that was the largest fundraiser for any veterinary school at that time. Mark serves on the McDaniel College Board of Trustees and the Certified Fundraising Executives International Board of Directors. He is also an internationally recognized expert on the art and science of fundraising, and a frequent presenter and lecturer on fundraising at national and regional conferences, as well as at San Diego State University and National University's Sanford Institute of Philanthropy. Mark has lived in San Diego for 13 years and has a lifelong interest in leadership studies and philanthropy. He is described by his peers as strategic, creative and driven to build and enhance relationships and by his colleagues as a selfless leader and dedicated staff coach with a high level of integrity, versatility and a strong spirit of innovation. Mark has been recognized as Outstanding Fundraising Professional by the Association of Fundraising Professionals, San Diego and achieved accreditation as a Certified Fundraising Executive (CFRE). He received a master's degree in educational administration with a focus on the support and evaluation of personnel from McDaniel College and a bachelor's degree in English, political science and public service from Albion College.



## **Mary Dowling**

### **Partner, For Purpose Law Group**

Mary Tovella Dowling is a practicing attorney and a partner at For Purpose Law Group, where she serves as co-chairperson of the firm's Nonprofit, Business, and Social Enterprise practice groups. Ms. Dowling's legal practice primarily focuses on providing full-service legal representation and outside general counsel services to tax-exempt organizations, social enterprises and entrepreneurs across a broad spectrum of industries and sectors. Ms. Dowling's nonprofit practice is focused on providing counsel and guidance to tax-exempt organizations and their donors as they navigate the myriad legal issues facing modern tax-exempt entities. Her current clients include a wide variety of public charities, private foundations, and other nonprofit organizations—from museums, religious and faith-based organizations, and social welfare organizations to sports-based organizations, business leagues, educational institutions and social clubs. As a passionate advocate for her clients at all stages of the nonprofit life cycle, she places a particular emphasis on corporate law and tax matters, under federal, state, and local tax laws, beginning with entity formation and applications for federal and state exemption, and including such issues as unrelated business income planning, fundraising, compliance with public support



tests, property tax exemption, nonprofit corporate governance, contract drafting and negotiation, corporate compliance, and joint ventures. In addition to her representation of tax-exempt organizations, Ms. Dowling represents social enterprises and other corporate clients in a wide variety of business pursuits and transactions, including business formation, contracts, mergers and acquisitions, dissolution, joint ventures, corporate compliance, and intellectual property. Relying on her complementary backgrounds in both business and law, Ms. Dowling is able to combine her areas of expertise to help her clients create, manage, and maintain successful business pursuits at all stages and across numerous industries.



### **Matthew D. Craig**

**Vice President, Government and Nonprofit Banking, JPMorgan Chase**

A senior relationship manager with more than 20 years of banking and investment experience, Matt serves as the primary point of contact for all of his clients' financial needs. As the leader of a team of specialists, he delivers a holistic suite of banking solutions, including deposits, loans, investments, cash management and treasury services. His prior roles with JPMorgan Chase include credit underwriting, commercial banking and private banking. Matt earned his BS in Business Management from Purdue University and an MBA from the UCLA Anderson School of Management, where he served as the director of microfinance for Net Impact and counseled aspiring young entrepreneurs as a Riordan Fellows mentor. Throughout his academic and professional careers, Matt has been an active volunteer and advocate for myriad charitable organizations.



### **Mike Gellman**

**CEO and Founder, High Five Career Coaching**

Mike Gellman is an accomplished author, organizational consultant and certified coach who has facilitated various talent management, succession planning, and employee engagement initiatives within nonprofit and Fortune 500 organizations – including the establishment of a highly-regarded career coaching and development center. He has a Master's degree in Industrial/ Organizational Psychology and is the CEO & Founder of High Five Career Coaching. Mike most recently served as one of six judges for the International Coach Federation's International PRISM Award which identifies organizations from around the world with the best coaching cultures.



### **Nancy Sasaki**

#### **CEO, United Way of San Diego County**

As President and CEO of United Way of San Diego County, Nancy Sasaki leads the organization to align community goals and leverage resources to reduce inequities and transform the lives of San Diego's children, young adults, and families. Over its nearly 100-year history, Sasaki is the second woman and the first Japanese American to be named President and CEO of the organization. Since joining UWSD in 2018, Sasaki has secured two major contracts; the first, from the State of CA, to provide education and outreach for the 2020 Census to hard-to-count populations throughout San Diego and Imperial Counties. The second, as part of JP Morgan's Advancing San Diego, a \$3 million initiative to drive job growth and create greater economic opportunities across the region. Led by the San Diego Regional EDC and in partnership with the City of San Diego, San Diego Workforce Partnership, and San Diego & Imperial Counties Community College Association, UWSD evaluates processes and outcomes that leverage the most effective methods for developing a highly educated, highly skilled workforce, including linking college students to paid internships in high-need industries. Sasaki has a strong track record of working with diverse communities and building sustainable solutions through collaboration and strategic partnerships. Sasaki previously served as Executive Director of Alliance Healthcare Foundation, advancing the health and wellness of San Diego and Imperial County residents through innovative grantmaking. Sasaki also served as President and CEO of Planned Parenthood in Los Angeles and held high-level positions for the organizations in California, Hawaii, and Texas. Sasaki earned her bachelor's in education with a teaching certificate and a master's in education for community health from the University of Texas at Austin. She serves on the boards of 2-1-1 San Diego, San Diego Impact Investors Network, and Regional Task Force on the Homeless San Diego County.



### **Natalia Moussa**

#### **Director of Finance, Kitchens for Good**

Natalia Moussa currently serves as the Director of Finance for Kitchens for Good. Natalia is a CPA with an accounting and finance career that includes the industries of private, public and non-profit. As a former auditor, she has seen and developed many policies and procedures that allow organizations to produce detailed and accurate financial statements while promoting a culture of fiscal transparency. A core value that Natalia and Kitchens for Good share is sustainability, this is a value that she believes should be built into everything the Organization does, including its financial model. Before joining Kitchens for Good Natalia worked at a public accounting firm providing auditing, tax and consulting services for her clients that were in the following industries: non-profit, pharmaceutical, real estate, professional services, manufacturing, hospitality, and high net-worth individuals. Other experiences include internal accounting for private domestic and international corporations. Natalia previously sat on the board or directors and served as the treasurer for the Friends of the San Diego Public Library and Kitchens for Good. She graduated from San Diego State University with a bachelor's degree in business administration with an emphasis in accounting. She is a member of the American Institute of Certified Public Accountants and the San Diego Women in Finance.



### **Nicholas Ladany**

**Dean, School of Leadership and Education Sciences, University of San Diego;  
Associate Provost for Academic Outreach**

Nicholas Ladany, Ph.D., serves as the dean of the School of Leadership and Education Sciences. A leading expert in counseling psychology, Ladany is responsible for overseeing the 4 academic departments, which includes 16 academic, credential, and certificate programs; three interdisciplinary research institutes; and two centers within SOLES. Prior to joining SOLES in 2015, Ladany served as the dean of the School of Education and Counseling Psychology at Santa Clara University in Santa Clara, CA. He previously served as Director of the Counseling Program at Loyola Marymount University in Los Angeles, CA; as well as Chair of the Department of Education and Human Services, and Program Coordinator & Director of Doctoral Training of the Counseling Psychology Program at Lehigh University in Bethlehem, Pennsylvania. He received his Ph.D. in Counseling Psychology from the University at Albany, State University of New York and has a B.S. in Psychology from the University of Maryland. He is a Fellow of the Society of Counseling Psychology, a division of the American Psychological Association. Ladany is an internationally known scholar and educator, having taught, given invited lectures, or presented in countries that include Canada, Denmark, Ecuador, England, Italy, Kuwait, Germany, Greece, Mexico, Norway, Panama, Portugal, Scotland, Spain, Switzerland, Taiwan, Turkey, the United Arab Emirates, and Uruguay. He is the author of five books and more than 80 publications and given more than 250 national and international presentations on the effectiveness of supervision; diversity, inclusion, and social justice; and higher education.



### **Pat Libby**

**CEO, Consultant, Pat Libby Consulting**

Pat Libby is a change management consultant working exclusively with nonprofits and philanthropies. Her 24-year consulting practice involves working with organizations to transition and recruit executives, strategically realign governance, program and operating structures, and find practical solutions to other complex problems. She approaches this work through the kaleidoscope of her experiences as a long-time nonprofit CEO, board member, academic, and consultant to innumerable organizations. Pat founded and led The Nonprofit Institute at USD for 14 years until July 2015. She is the author of a popular blog that can be found at [patlibby.com](http://patlibby.com), as well as two books: *The Lobbying Strategy Handbook*, (Sage 2012) and *Cases in Nonprofit Management* (Sage 2016).



### **Pedro Villegas**

**Director of Community Relations, San Diego Gas and Electric Company**

Pedro Villegas is Director of Community Relations for the San Diego Gas & Electric Company, a wholly-owned subsidiary of Sempra Energy, a Fortune 500 company based in San Diego, California. Mr. Villegas is responsible for SDG&E's corporate philanthropy and relations with non-profit and community-based organizations in San Diego County and south Orange County. Mr. Villegas' career includes several positions managing external, regulatory, legislative, policy, and international affairs in private, state government, and non-profit sectors. Mr. Villegas has served as Director of Regional Public Affairs for SDG&E and as Manager of Regulatory Relations for SDG&E and the Southern California Gas Company, the largest natural gas distribution utility in the United States and also a wholly-owned subsidiary of Sempra Energy. His primary areas of responsibility included advocacy of energy efficiency, natural gas,



and customer issues at the California Public Utilities Commission. Mr. Villegas previously served as Government Affairs Manager for Sempra Energy, managing relations with local communities and local and state governments and in several Western states. From 1999 to 2003, Mr. Villegas held several posts in the California State Assembly. He served as Deputy Director of the Speaker's Office of International Relations and Protocol, as Principal Consultant to the Assembly Committee on Jobs, the Economy, and Economic Development, and as Senior Consultant to the Assembly Select Committee on California-Mexico Affairs. Mr. Villegas was also Program Assistant at the Pacific Council on International Policy, an international affairs non-profit organization in Los Angeles, California. He is a former Research Fellow of the Center for U.S.-Mexico Studies and a former Foreign Language and Area Studies Fellow of the Center for Iberian and Latin American Studies, both on the campus of the University of California, San Diego. Mr. Villegas holds a Master of Pacific International Affairs degree from the Graduate School of International Relations and Pacific Studies of the University of California, San Diego. He received his Bachelor of Arts degree from the University of Notre Dame. He serves on the board of directors of the National Conflict Resolution Center, the San Diego Tourism Authority, Rise San Diego, and the Downtown San Diego Partnership.



### **Regan Dishon**

#### **Senior Account Executive, Community Boost Consulting**

Regan Dishon is a Senior Account Executive at Community Boost Consulting, a digital marketing agency that directly services over 125 forward-thinking nonprofits. The Community Boost team is trusted by the Statue of Liberty-Ellis Island Foundation, the Trevor Project, The San Diego Foundation, International Community Foundation, Natural High, North County Health Services and the United Way of San Diego.



### **Reid Carr**

#### **CEO, Red Door**

With over 20 years of digital marketing experience, Reid Carr has built Red Door Interactive to be an internationally-renowned full-service marketing agency with hubs in San Diego and Denver. Founded on helping brands win market share in this rapidly changing marketing landscape, Reid has evolved this fiercely independent agency over the last 18 years and has been awarded for both fast growth and effective culture by Advertising Age, Inc. Magazine, and a variety of regional publications. Red Door's emphasis on informed storytelling shapes, strategies informed by data, articulates the soul of the brand, and integrate marketing tactics to magnify results for long-time clients such as Bosch, ASICS, Titleist, Shea Homes and more. Reid's community involvement has included United Way of San Diego County, Voice of San Diego, Rotary, San Diego Venture Group, SDG&E's Community Advisory Council and more.



### **Rick Dahlseid**

**CPA, Financial Consultant**

Serving the nonprofit community for the past 15 years has allowed me to use my past experiences to work with many San Diego nonprofits and help build their capacity to help more people flourish. I have been privileged to present in the past with the Governance Symposium as well as the Nonprofit Academy and have enjoyed positive feedback from leadership and attendees. I plan on continuing to serve this community for many years to come.



### **Rusty Stahl**

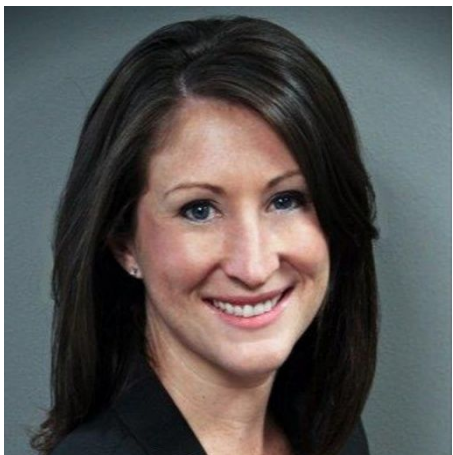
**Founder, President and CEO, Fund the People**

Rusty Stahl is committed to ensuring that all Americans have the opportunity to work for social change by forging nonprofit careers. Stahl serves as Founder, President and CEO of Fund the People. Fund the People is the national campaign to maximize investment in America's nonprofit workforce. A visionary and proven social entrepreneur, Rusty is a frequent presenter at local and national philanthropy and nonprofit conferences across the country. His work has been cited in the New York Times, Boston Globe, Chronicle of Philanthropy, Nonprofit AF blog, and other prominent media platforms. Stahl previously served as a Visiting Fellow in Residence at New York University's Wagner School of Public Service, where he did research that led to the 2014 launch of Fund the People. During 2002-2012, Rusty was founding Executive Director of Emerging Practitioners in Philanthropy (EPIP), the leadership development network for young and new foundation professionals. Stahl served as a program staffer at the Ford Foundation, where he supported grantmaking to strengthen philanthropy, the nonprofit sector and social justice movements. Rusty currently serves as Fundraising Chair on the Board of Directors of his synagogue, the Beacon Hebrew Alliance. He served six years as a board member at Jews for Racial and Economic Justice (JFREJ), including as Executive Transition Co-Chair. He has also served on the boards of Idealist.org, Bikkurim: an Incubator of New Jewish Ideas, and Changemakers. Additionally, he has been on advisory boards for the Council on Foundations, Independent Sector, and Indiana University. Rusty earned an M.A. in Philanthropic Studies from Indiana University's Lilly Family School of Philanthropy, where he was a Jane Addams Fellow and studied with the late Hon. Robert L. Payton, the first-ever professor of Philanthropic Studies. Born and raised in Philadelphia, and a long-time New Yorker, Stahl now lives with wife and two daughters in the Hudson Valley north of New York City.



**Sally Dadmun Bixby**  
**Philanthropy Studio, LLC**

For three decades Sally Dadmun Bixby has helped nonprofits overcome challenges, grow, and thrive. She has worked with a wide variety of organizations from all-volunteer startups to well-established, multi-million-dollar nonprofits create fundraising goals, meet and exceed them! Aspiring to teach high school history, she earned a Masters in Teaching in the late '80s. Like many in the field, Sally accidentally became a fundraiser. After several development director positions with the last one lasting for seven years, she started Philanthropy Studio in 2012. Philanthropy Studio combines her love of teaching and her passion for fundraising. Sally has also served on several boards over the years. Currently she is on the Portland Homeless Family Solutions board and the Resource Development Committee for Episcopal Community Services in San Diego.



**Stacey Bergman**  
**CPA, YH Advisors**

Stacey's comprehensive professional experience includes over 14 years in public accounting with 2 years in the private sector. While in public accounting, the majority of her time was focused on working with her exempt organization clients. Stacey has extensive experience working with exempt organizations in the preparation of their internal financials, helping exempt organizations get ready for financial audits and reviews, the conducting of audits, reviews and compilations for exempt organizations of varying size and the preparation of the information and income tax returns for exempt organizations. Stacey regularly conducts technical presentations for exempt organizations. Recent seminar topics have included the creation and implementation of internal controls within an exempt organization, financial management acumen courses, deciphering variations between the Form 990 financial statements and audited financial statements and guiding members of board of directors in understanding exempt organization financial statements. Remaining connected to her community is something that Stacey greatly values. She participates in a multitude of philanthropic events and fundraisers and currently serves as Treasurer for the Boys and Girls Club of Buena Park. Stacey earned a bachelor's degree in Accounting from California State University Long Beach. Personal interests include hiking, snow skiing, baking and spending time with her husband and kids.



**Stephen Chin**  
**Manager, Account Management and Community Relations, Sharp HealthCare**

Stephen Chin's professional experience includes more than 20 years with major health care organizations, including Blue Cross Blue Shield, Kaiser Permanente, Aetna, and Sharp HealthCare. Currently, Stephen's team oversees the most significant client relationships within the Sharp portfolio — including those with the City of San Diego and CalPERS. Prior to joining Sharp, Stephen managed strategic sales initiatives and community programs, and he also supported progressive physician projects, which address health care disparities. Stephen believes in the integration of business and community, and he proudly supports diverse community partners. His board and committee service includes Access to Independence; EPIP; Kyoto Prize; North San Diego Business Chamber; Pacific Arts Movement; San Diego Community College District; Second Chance; Sharp Women's Health Conference; Urban League; and most recently, the Advisory Board for USD's Nonprofit Institute. Stephen studied communications and film production, and when time allows, he enjoys watching the latest in films of all genres.





### **Sue Carter-Kahl**

**Lecturer, University of San Diego**

Nonprofits need labor, funding, awareness, community trust, and a positive reputation to be successful. Investing in volunteers with intention can advance each of these areas, yet boards rarely discuss volunteerism as a part of their strategy and planning. This session will translate the latest research on volunteerism into practical tools and exercises that you can apply in your organization.



### **Tessa Tinkler**

**Senior Research Associate, The Nonprofit Institute**

Tessa Tinkler has over fifteen years of experience conducting quantitative and qualitative research and evaluation in K-12 schools and nonprofit organizations. She has experience working collaboratively with many different stakeholders to assess a wide diversity of programs where measuring impact is not one size fits all. Prior to coming to the University of San Diego, she worked for eight years as an evaluator and researcher at the City Heights Educational Collaborative, a university-school partnership designed to increase college and career readiness for low-income students in San Diego. Dr. Tinkler's passion is partnering with organizations and schools to evaluate the effectiveness of programs and strategies designed to reduce social inequalities. Her recent work has included research in informal learning environments, mobile learning, best practices in teacher recruitment, and health and wellness in schools.



### **Zachary Green**

**Professor of Practice; Director, Leadership and Diversity Initiatives, The Nonprofit Institute, University of San Diego**

Zachary is a professor of practice in Leadership Studies and the Director of Leadership and Diversity Initiatives at Nonprofit Institute, University of San Diego. He is also lead faculty for the RISE Urban Leadership Fellows. A clinical psychologist by training, Zachary teaches courses on human development, organizational behavior, coaching, human development, dialogue, negotiations, mindfulness, and love. As a practitioner, Zachary's clients include multinational corporations, government agencies, NGO's, universities, religious institutions, and nonprofits entities. He has coached top leaders at the World Bank for the better part of two decades. Zachary frequently offers training on integral theory and unconscious psychological dimensions of leadership. He also has nearly three decades of experience working issues related to human relations, including and beyond diversity, equity and inclusion. He was a senior associate for the National Multicultural Institute in Washington, DC. Through this organization, he guided a global training project to implement an anti-discrimination at the International Monetary Fund as well as served on the dialogue development team for the President's Commission on Race during the Clinton Administration. The other focus in this area of work has been group relations conferences that promote principles of adaptive leadership and the study of unconscious organizational processes, especially those related to race and identity. He is a co-founder of Group Relations International and a fellow of the A.K. Rice Institute. Celebrating 30 years of group relations work, Zachary has directed nearly 20 conferences and staffed dozens

more in the United States and internationally. Most recently, Zachary was the director of the On the Matter of Black Lives conference and also directed the first all-Black staff group relations conference 20 years ago in Washington, DC. His article on "The BART Method of Organizational Analysis: Boundary, Authority, Role and Task," co-authored with his husband, René Molenkamp is frequently assigned at colleges and universities where group relations principles are practiced. The most recent venture for Zachary, through IMAGO Global Grassroots, involves co-creative model of international development in with organizations that serve the poorest of the poor in South Asia, Sub-Saharan Africa and South America. Zachary received a doctorate in Clinical Psychology from Boston University, completed advanced clinical training at Cambridge Hospital/Harvard Medical School and Georgetown University. He began his consulting career as an associate of what was then the Wharton Center for Applied Leadership. Before completing graduate school, Zachary was a middle school counselor and high school English teacher. He and his students in the Shaker Heights City School District founded the Student Group on Race Relations to address racial divides that came with the integration of schools. The program continues to exist to this day and has heralded and replicated for its effectiveness in helping young people enter dialogue and learn from each other on how racial matters. He began his academic career as a senior scholar for the James MacGregor Burns Academy of Leadership, University of Maryland. There he consulted to a four-year process with emerging leaders of Northern Ireland in advance of the Good Friday Accord and facilitated the inaugural convening of the International Leadership Association.