CommonSense Governance
FRIDAY – SATURDAY, JANUARY 9 – 10, 2015
PRE-SYMPOSIUM WORKSHOPS THURSDAY, JANUARY 8, 2015
JOAN B. KROC INSTITUTE FOR PEACE & JUSTICE, UNIVERSITY OF SAN DIEGO

Who Should Attend
• Both new and experienced board members
• Teams comprising board members and staff
• Chief executives, foundation leaders and emerging leaders
• Public board and commission members
• Prospective board members
• Service club members

For updated information and to register online: www.sandiego.edu/npgovernance
CommonSense Governance

Governance is the actions of a legally constituted board of directors who together advance their cause with oversight, foresight and insight on behalf of the community and for the common good.

Liz Shear, The Kaleidoscope of Governance

Common sense weaves together our logic, insight, ethics and more to produce prudent and sound judgment. It is exactly what we want when governing. With common sense we become the exceptional board our organization needs us to be — "effectively advancing our cause with oversight, foresight and insight." Without it, we make imprudent decisions and we shortchange our cause.

Common sense is our understanding of how our cause is part of our broad community purpose and collective responsibility. It is our organization embedded in the community context where we govern "on behalf of the community and for the common good." With it, our sector is a powerhouse, weaving together a healthier and richer community tapestry. Without it, we lose sight of our actual interdependence with stakeholders and the community-at-large and we put our organizations at risk.

If we want exceptional governance, then we need to pay attention to the knowledge, methods, tools and relationships that encourage and support it. In other words we need both individual and collective common sense.

The 2015 symposium is a tribute to these strengths that have made our sector such a driving force. Its 45 workshops, seminars and lectures explore internal and external strategies, systems, methods, best practices and successful examples. We have gathered an outstanding group of field experts to teach how to build and sustain this kind of governance.

Our objectives

- You will leave inspired, connected and with an increased understanding of the key trends, issues, highlights and insights impacting nonprofits
- You will discover, share and develop ideas, techniques and practical methods to apply to your governance roles and responsibilities
- You will learn how successful nonprofits continuously renew the link between what they do and the needs and interests of the communities they serve
- You will understand the regional context in which you practice governance and discover solutions to connecting more effectively with your communities

Register online: www.sandiego.edu/npgovernance
8:00 a.m. Registration, breakfast and networking
8:30 a.m. Welcome | Janine Mason and Tony Hsu, co-chairs USD Nonprofit Institute Advisory Board
8:50 a.m. Presentation of 2015 Kaleidoscope Award for Exceptional Governance and panel discussion: Dr. Mary McDonald, chair, Kaleidoscope Award Committee
10:00 a.m. Symposium Orientation: Liz Shear, director, USD Governance Symposium
10:10 a.m. Break
10:25 – 11:50 a.m. Workshops
- Managing the Board (B)
- What Makes or Breaks a Merger (A)
- Inside the 2014 Kaleidoscope Award Winner’s Boardroom: Voices for Children
- Financial Hot Button Issues for Nonprofit Boards
- Conversational Practices to Manage Conflict (I)
- Common Sense Strategy for Boards to Engage in Resource Development
- Sustaining Board Membership: One and Done vs. the Long Term
- Financial Inquiry: Taking Financial Oversight Further (I)
- Four Attributes of High Performing Organizations (I)
12:10 – 1:25 p.m. Lunch
Lunch Keynote: Marjory Kaplan, CEO, San Diego Jewish Community Foundation, will be joined by Dr. Paula Cordeiro, Dean, USD School of Leadership and Educational Sciences, for an in-depth interview on how the extraordinary SDJCF board developed, what it takes to maintain it and how this board strengthens our community.
1:40 – 3:30 p.m. Workshops
- Inside the 2014 Kaleidoscope Award Winner’s Boardroom: Ocean Discovery Institute
- Managing the Board’s Work (A)
- Financial Primer for Nonprofit Organizations (B)
- How to Building a Financially Sustainable Organization for the Long Haul
- The Next Generation of Nonprofit Board Leaders
- Opportunities and Obstacles: Navigating Nonprofit Partnerships
- The Role of Place
- Utilizing Marketing Research Effectively
- Governing in a Fiscally Sponsored Program (B)
- New Federal Audit Regulations: Avoiding Compliance Pitfalls

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Saturday

8:00 a.m. Registration
8:30 a.m. Welcome | Pat Libby, professor of practice and director, USD Nonprofit Institute
8:45 a.m. Keynote Address: Uncommon Sense on Boards: Turning Conventional Wisdom on its Head
Jan Masaoka, CEO, California Association of Nonprofits and leading nonprofit writer on governance and the role of our sector in society. She is also the founder and publisher of Blue Avocado Magazine.

9:30 a.m. Break
9:45 – 10:45 a.m. Mini-Lecture Series
• State of Nonprofits and Nonprofit Trends in San Diego
• Beyond Generosity: The Logic Behind Donor Giving
• Social Media Marketing: Best Practices for a Successful Campaign
• The Evolution of Volunteerism in San Diego: From One-Stop Shop to a Service Tapestry
• Refugees in Our Midst
• Nonprofit Megatrends
• Both Sides Now: How Great Financial Management Can Connect Stakeholders with Mission
• The Board’s Role in Program Evaluation

10:45 a.m. Break
11:00 a.m. – 12:30 p.m. Workshops
• Know When to Hold, Know When to Fold: Closing Your Organization
• Strategic Alliances
• The Power of Campaign Fundraising (A)
• Engaging the Public in Your Cause: How to Get Support When You Need it Most
• The Board’s Role in Advocacy
• Winning the Lottery: How to Use Your 990 to Strengthen Your Case for Support
• Systems Thinking
• Dollars and Sense: Developing Your Organization to Achieve Fundraising Success
• Connecting to Your Community

12:30 – 1:30 p.m. Lunch
1:30 – 3:30 p.m. Plenary Session: Saving the Opera: Lessons Learned from a Board Perspective
On March 19, 2014 the San Diego Opera board of directors voted 33-1 to cease operations due to a seemingly insurmountable financial shortfall. Two months later, a leaner more engaged board voted to rescind the vote, produce a modified 2015 season and begin the generative thinking necessary to create a new sustainable model for opera in San Diego. A panel of board members will share lessons learned from this process and provide a glimpse into the future with a focus on applications that can benefit any nonprofit organization.
Moderator: San Diego Opera board member Linda Spuck, vice president/trust administrator, The Private Bank San Diego, Union Bank

Register online: www.sandiego.edu/npgovernance
TWO EASY WAYS TO REGISTER!
Choose one of the following:

1. Log onto npgovsym15.kintera.org to register and pay online.

OR

2. Complete the form below and mail it with payment to the University of San Diego, Institute for Nonprofit Education and Research, 5998 Alcalá Park, San Diego, CA 92110. A confirmation will be sent to you upon receipt of your registration. Please make checks payable to the University of San Diego.

REGISTRATION FORM
Early Bird Special! Register by September 8, 2014

Please check the box(es) you wish to register for.

FEES – SYMPOSIUM ONLY
Registration Per Person: Check all that Apply
☐ Friday $115 x _______ = $________
☐ Saturday $90 x _______ = $________

FEES – PRE-SYMPHOS WORKSHOPS FOR TEAMS OF TWO OR MORE
Registration Per Person
☐ Thursday $50 x _______ = $________
Total $________

Groups of five or more email Amanda Corona, AmandaCorona@sandiego.edu, for discount pricing

Main Contact Information

Main Contact Name
Title
Organization
Address
City, State, Zip
Daytime Phone
Email (required for confirmation)

Partial scholarships are available for those in need. Please contact Jennifer Yebba (jyebba@sandiego.edu) for more information.

Attendee Information
If you are registering more than one person please provide the following information for the additional attendees:

Attendee 1 Name
Title
Organization
Email
☐ Pre-Symposium Workshop ☐ Friday ☐ Saturday

Attendee 3 Name
Title
Organization
Email
☐ Pre-Symposium Workshop ☐ Friday ☐ Saturday

Attendee 2 Name
Title
Organization
Email
☐ Pre-Symposium Workshop ☐ Friday ☐ Saturday

Attendee 4 Name
Title
Organization
Email
☐ Pre-Symposium Workshop ☐ Friday ☐ Saturday

Early Bird
7/1/14 – 9/8/14
Regular
9/9/14 – 1/7/15

Pre-Symposium
$50
$50

Workshops
Friday
$115
$125
Saturday
$90
$100

(233x718)
(308x519)
(308x495)
(308x472)
(308x448)
(308x425)
(308x402)
(308x378)
(311x413)
(313x173)
(313x157)
(313x131)
(313x104)
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