

Session II Workshops

Tools for More Effective Board Meetings

This session will address some common challenges faced by nonprofit board meetings. These challenges include board size, an inefficient use of time, difficult decision-making, and an inability to keep all members engaged and committed in the work. There are a number of meeting tools that can help boards to have more effective meetings, and they do not require special training or a facilitator to use. The tools address different aspects of board meetings. Some may seem familiar, but all have a unique role in creating a robust structure for your meeting. A more effective structure naturally builds productive discussions, helps the group stay on track and on time, and builds greater commitment to meeting results.

Rick Lent has spent 25 years facilitating meetings around the world in business, non-profit organizations and communities. His innovative use of meeting structure improves the way people talk together and address complicated issues to build commitment to action. He has facilitated effective meetings that bring people together to address strategic planning, organizational change and societal issues. He has helped nonprofit boards redefine strategy, resolve governance issues, and improve teamwork. Rick's e-book, *Meeting for Results Tool Kit: Make Your Meetings Work*, was published in 2012. He received a Ph.D. from Syracuse University and continued studies in organizational development.

Making the Most of Skilled Volunteers

Skills-based volunteering (SBV) has emerged as a powerful way to create synergies between the private and public sectors. In this session, Common Impact will help organizations navigate SBV as a way to enhance their technology, their access to strategic corporate relationships, and their readiness to engage skills-based volunteers. This workshop will present immediate, medium, and long-term technology solutions available through skilled volunteers, how to find these opportunities, and how to maximize these opportunities by sustaining cross-sector relationships and growing their resource pipeline. These solutions are particularly important at a time when traditional funding sources continue to be scarce for nonprofit infrastructure and capacity-building, and corporations are starting to rethink their community engagement efforts and work with nonprofits.

Danielle Holly serves as the Executive Director at Common Impact and is considered one of the country's leading experts on skills-based volunteerism (SBV). She shares her experiences designing SBV programs and strategic vision for the future of the sector at leading industry conferences and events such as Points of Light's National Conference on Volunteering and Service. Danielle has helped numerous corporations and nonprofits navigate the new era in skills-based volunteering, including global powerhouses Fidelity Investments, John Hancock and State Street. Danielle has earned her B.A. at Fordham University in New York City and an MBA from Boston University.

David Noymer joined The Greater Boston Food Bank as Chief Financial Officer in July 2009. In this role, he is responsible for Finance and Accounting, along with Information Technology. Prior to joining The Food Bank, Noymer served as CFO for several different service sector companies over the past 22 years. Noymer also served as a Director for the Boston Chapter of Financial Executives International from 1999 – 2001. He earned a BSBA in Accounting from American University, and an MBA from the University of Massachusetts. Noymer is a CPA in Massachusetts.

Matt Konchak is a Derivatives Business Analyst at State Street Corporation. In this role, he develops applications to manage derivatives data and well as leads and develops staff to ensure project deadlines are achieved. Matt joined State Street in 2006 and has held developer and analyst roles during his tenure. An active volunteer, Matt has participated on several IT skills-based volunteering projects with Common Impact. He has earned a B.S in Economics from Pennsylvania State University's Smeal College of Business.

Talk to Your Donors: Groundwork for a Major Gift

How do you take a donor who has attended an event or donated to a direct mail appeal and turn them into a major donor? This session will motivate and provide tools for board and staff to successfully set up and engage in in-person meetings with funders to create the relationships that can lead to major gifts. This workshop will provide information about why in-person visits make sense for certain donors, how to identify which donors to contact, best practices in setting up the visit, and a framework for the conversation for maximum donor engagement. In addition to providing a framework that inspires confidence, it also teaches how to maximize the value and fundraising outcomes of these visits. For nonprofits leaving dollars on the table because they rely solely on direct mail, special events and grants, this is one of the most productive steps

they can take. Participants will leave with a clear understanding of what should be accomplished during a visit with a donor, follow-up and record-keeping plans, and the confidence to engage in successful in-person donor visits.

Diane Remin, MBA, sees the nonprofit sector through her lens as a board member and consultant. As a board member, Diane has made millions of dollars of successful “asks.” She has been consulting with nonprofits since the 1990’s. Her most recent venture, MajorDonors.com, helps smaller nonprofits boost operating revenues through board-building and major gifts. Diane holds a B.A. from Carnegie-Mellon University, an M.A. Ed. from George Washington University and an M.B.A. from Boston University. She likes to point out that giving is good for your health—and can back it up! Catch her on Twitter @DianeRemin.

Engaging Supporters in a Mobile World

Within the first 15 minutes of waking up, 4 out of 5 smartphone users are checking their phone. If nonprofits want to be relevant in the lives of today’s Americans, you have to be on their phones. This workshop will provide eye-popping statistics on mobile usage and trends, present strategies that nonprofits must employ in order to stay relevant and top-of-mind with today’s smartphone-obsessed consumers, and share powerful tools to help nonprofits easily and affordably communicate with current and future supporters.

Greg McHale is a seasoned executive with 25 years of experience in the technology industry. A decade ago, Greg left corporate America to start a “do good” revolution. In 2002, Greg founded BiddingForGood, a website that has helped thousands of nonprofits raise over \$175 million. Greg then launched Good2gether, connecting nonprofits with millions of consumers via media partnerships with high-traffic websites. In 2012, Greg founded DoGood, a mobile app that gets smartphone owners to engage with their community through volunteering, everyday purchases and social sharing, and enables nonprofits and businesses to reach supporters in a more powerful way.

Utilizing Technology for More Effective Collaboration

This session will showcase the best of cloud-based collaboration and video conferencing tools that are increasingly valuable as more staff work remotely, offsite and in the field. Participants will gain information that will help their organizations select the best tools for real-time collaboration, offsite data availability and video conferencing. We will demonstrate the platforms of Box.com, Google Hangouts/Drive and Fuze, as well as an easy method for creating and maintaining an Intranet. Discussion points will include feature comparisons, ease of use, cost, data security and ideas for effective staff training and buy-in.

Todd Ching is a Senior Nonprofit IT Client Manager for Insource Services, with over seven years experience working specifically with the nonprofit sector. Todd currently focuses on designing, providing, and troubleshooting technology systems with several NGOs, community development and charter school clients in the Boston area and has also volunteered with several political campaigns. He is an expert in Google Apps (Google Sites, Apps administration and Exchange migrations), Box.com and Dropbox. Todd holds a BA in Political Science and History from Boston College.

Ryan Ecclestone is a For-Profit IT Client Manager at Insource Services. Ryan has spent five years working in the For-Profit technology sector, with responsibilities ranging from project management and architecting technology systems to providing IT operations and strategy support to many small businesses in the Greater Boston Area. One of his core competencies is designing scalable solutions across any technology platform. Ryan holds a BS in Computer Information Systems from Bentley University.

How Effective Leaders Use Coaching to Boost Performance

Coaching is one of the fastest growing and most successful methods for increasing employee engagement and job performance. With command and control management styles dying (if they ever worked) in nonprofit organizations, they’ve been replaced with coaching, one of the most effective ways to help people grow and develop. To effectively tap the best that our people have to offer, leaders have to learn not just to manage, but to develop their employees. This workshop will demystify coaching by showing executive directors and other senior nonprofit leaders what coaching is and is not, the characteristics of a good leader-coach, when to use coaching, four key coaching skills that effective leaders need, and the difference between coaching and managing. Most importantly, leaders will learn the skills and techniques necessary to be successful leader-coaches.

As a Principal of Peeler Associates, Marie Peeler helps leaders find engagement, clarify objectives, improve interpersonal effectiveness, and attain their goals. With 20 years senior management experience, Marie helps nonprofit leaders and teams increase their leadership effectiveness through executive coaching, team development, custom workshops, business retreats, and meeting and keynote presentations. Marie has a Master's degree in Organizational Learning & Development, is an ICF credentialed Professional Certified Coach, and is a member of the Nonprofit Consultants Network.

Sharing and Learning from Digital Storytelling Tools

New digital tools are emerging every day, making it easier for your nonprofit to tell its story online.

From curation to publishing, if you're looking to share a story, there's an app, website or tool that can help you do it. The workshop will offer an outline of the principles of good digital storytelling, provide examples of nonprofit digital storytelling, and review both the popular as well as some of the more unusual-but-useful online storytelling tools. Then the fun starts! In the second half of the workshop, participants will share their storytelling ideas and tools in the style of "speed dating," and also ask their peers to help them discover a tool that will help them meet their storytelling needs.

Debra Askanase is the founder and Digital Engagement Strategist of Community Organizer 2.0, a social media consulting firm to nonprofit organizations specializing in online strategy and engagement. She has a passion for digital engagement, and creating a better world through online engagement. Prior to opening Community Organizer 2.0, Debra worked at nonprofit organizations in the greater Boston area, originally as a community organizer and later as a program director, and executive director. Debra holds a B.A. from Emory University and a M.B.A. in International Business from Bar Ilan University.

Listen, Seek & Engage: Cultivating Your Network with Social Media

This session is designed to help participants move beyond counting likes and followers to a deeper understanding of social media as a powerful tool for cultivating one's network. The session will offer concrete methods for strengthening a nonprofit's network by using social media to LISTEN to key stakeholders, SEEK new contacts and ENGAGE effectively with current contacts. We will cover specific aspects of Twitter, Facebook and LinkedIn that can help with relationship building, as well as effective social media content strategies for network cultivation. Though we will cover some "how to's" on the topic, this is not intended for those seeking to learn the basics of how to get started on social media.

David Crowley brings over twenty years of leadership in the nonprofit sector. He founded Woburn-based SCI, a national leader in civic engagement, which has grown to serve 11 Massachusetts communities and reaches 50,000 individuals annually. SCI has been recognized for combining technology and community building in Mass. High Tech and through presentations at Google, the Digital Government Summit, and many other venues. David has nearly 5,000 Twitter followers and over 900 LinkedIn contacts. He was chosen as a Social Innovator in 2003. David graduated from Harvard College in 1991.

Aligning Tools and Talent to Measure Outcomes

This session will provide a case example of how a small organization has developed and rolled out a new set of integrated outcomes measurement tools, using technology to increase the consistency and efficiency of data, processes, and analyses, and most importantly, to drive mission achievement. It will detail the process of choosing relevant technologies based on factors including cost, ease of implementation and maintenance, and information security needs; developing measurement tools and translating them to the chosen technologies to enable effective reporting and analysis; and translating the tools to a process that staff could use consistently and efficiently. The session will identify key principles that can be applied to nearly any project in which technology provides an opportunity to improve processes; these same principles have guided processes that enable more effective and efficient recruiting, onboarding, and fundraising. The case example will demonstrate and provide quantitative data to show increased productivity, consistency of data, and efficiency as a result of this work. Participants will be able to apply generalized principles to achieve the same results within their own organization.

Jenn Bender serves as Managing Director for New Sector Alliance, a nonprofit that provides capacity building for nonprofits and professional development for emerging leaders, where she has led operational effectiveness initiatives. Before joining New Sector, Jenn served in organizational and program management roles at youth development and human services organizations. Jenn holds a BA in Psychology and Math from Cornell University, an Ed.M. from Harvard's Graduate School of Education, and an MBA from Babson College. She currently serves on the Board of Directors of the American Camp Association and the Seven Generations Board of City Year Boston.

Jenn Taylor is Chief Operations Officer at 501Partners, LLC, where she brings over 15 years' experience aligning technology with mission in non-profits, local government, higher education, and startups. Prior to joining 501Partners, Jenn founded a consultancy specializing in operational effectiveness for nonprofits and higher education. She holds an MBA in Nonprofit Management from Brandeis University and is an active participant and frequent presenter in local nonprofit technology user groups.

Six Steps to Creating Your Outcomes Success Stories

Today more than ever, agencies must know how to track and tell outcomes success stories. Knowing how to create those stories is one of the most valuable skills we can acquire. Using your own mission and program goals, this workshop will equip participants to identify and share outcomes success stories using technology solutions. Through presentation and group exercises, workshop participants will learn the process for developing outcomes statements for each of your identified groups; how to define the milestones and goals associated with proving your outcomes statements; best practices for creating performance and progress metrics; how to apply these outcomes management metrics to the measurable elements in your agency's technology solution; and unique ways to use your outcomes data reports to tell your outcomes success stories.

Seychelle Martinez is a graduate of San Jose State University with a degree in Sociology/Criminology. She has extensive experience in project management, gained as a technology consultant for WeTEC. Seychelle has also held intern positions with Enriching the Lives of Children with Autism, Community Homeless Alliance Ministry, Homeless Connect, Student Homeless Alliance and Students Advocating Global Engagement, and has served as Secretary for the Gulf Coast Civic Works Project. Seychelle has been with CTK for over 5 years providing implementation and customer support for CTK products. She is currently the Director of Software Implementations for Apricot Customer Care.

Shelly Johnson is a graduate of the University of Texas at Austin with a BBA in Marketing. Through positions in the Texas State Senate and Connect 2 the Kingdom (C2K) in Dallas, TX, she has significant experience working with nonprofits and government agencies. In her multiple years with CTK, she has guided over 125 organizations through the process of integrating their data and implementing Apricot. Additionally, she has lead in-person and remote trainings for CTK's international partner companies. Shelly continues to support these and all customers through on-going usage and support programs, daily training webinars, and one-on-one consultations.

A Talk with Funders: Nonprofit Technology Support

The right technology infrastructure can dramatically improve nonprofit operations and outcomes, but all too often it can be hard for organizations to overcome barriers to effective technology utilization. These challenges include lack of technology knowledge, staff capacity, adequate training, and funding. In its recent publication, "A Funders Guide to Supporting Nonprofit Technology," Idealware identifies ten ways foundations can support nonprofit technology needs, including providing direct training for staff to convening nonprofits for peer learning to funding training on hardware and software selection and usage. Hear from funders from different parts of the state about how they provide support for nonprofit technology needs.

Panelists TBA!