

Session I Workshops

Minimizing Board Discord and Maximizing Productivity

We encourage boards to have lively discussions at meetings—but what if the dialogue becomes unproductive? This workshop will focus on tips and techniques for fostering healthy board interactions. Participants will gain insight into the importance of planning an actionable and engaging board meeting and communicating effectively throughout the meeting. Participants will also learn to identify and manage challenging behaviors, opposing personalities, and conflict scenarios. By focusing on aspects of listening and interpersonal communications, participants will be better positioned to create a collaborative and cohesive board environment and, when necessary, address conflict. Through increased knowledge of specific patterns and behaviors, and through review of some specific tools, attendees will be able to help their boards move toward more positive and productive outcomes.

Sue Ogle has worked with a number of nonprofits in the areas of organizational development, strategic planning, and team building. She has served as a lead facilitator for ESC Team Building, Constructive Feedback, and Trainer Programs. Sue has 30 years of training and consulting experience that include founder in 1992 of OGLE Training and Consulting, Assistant Director for Career Placement at Yale School of Management, and Managing Partner of Career/Life Alternatives. In addition, she was Regional Director for the Northeast Region of the American Society for Training and Development as well as ASTD President of the Southern CT Chapter.

Lisbeth (Betsy) Kamborian advises nonprofits on board development and engagement, fundraising, and financial planning. She facilitates board retreats and gives presentations on building effective boards and understanding financial statements. She has served on many nonprofit boards and is a current board member of Dress for Success Boston, the South Yarmouth Citizens' Association and the New England Beetle Cat Boat Association. Previously, Betsy served as President of Women in Development of Greater Boston, President of the National Child Research Center, President of the South Yarmouth Tennis Club, and as a Trustee of the Dana Hall School.

Smart Technology = Engaged Board Governance

For a nonprofit board to be engaged and effective, its members first have to understand their governance responsibilities in three key areas: ensuring the organization's mission is carried out over time; financial accountability; and managing the employer/employee relationship with the organization's executive leadership. But understanding their responsibilities is only half the solution; the other half is utilizing tech strategies that help manage and minimize tasks that may appear onerous to the board. Tools like Dropbox, Survey Monkey, Google Apps and Skype can help manage responsibilities in the areas of executive compensation, conflict of interest avoidance, strategic planning, and financial planning; minimize the burden of due diligence obligations; ensure regulatory expectations are met; and keep boards happy and productive.

Liz Reinhardt has worked with nonprofit corporations, charitable trusts, and religious organizations as a lawyer, regulator, advocate, consultant, educator and board member. A graduate of the Northeastern University School of Law and former AAG in the Division of Public Charities, she maintains a private practice in Boxborough to serve the legal needs of nonprofits. Practice areas include regulatory, corporate, contract, employment, and litigation matters. She offers nonprofit clients 'outsourced' in-house counsel services and consults in areas including the roles and responsibilities of board members, governance best practices, conflict of interest avoidance, executive compensation, fundraising and regulatory compliance.

Fundamentals for Stewardship to Engage Your Donors

While it's easy to talk about building and strengthening relationships with our donors, this workshop addresses the nuts and bolts of designing a stewardship program, engaging donors as investors in the future, and how to get out of the office and meet with your donors. You'll use a worksheet to assess your current system, develop a stewardship plan, and as a group, design an evaluation process to measure the effectiveness of the plan. The session will cover best practices and participants will leave with the beginnings of a stewardship program design, whether setting up a new program and budget, strengthening your existing program, or figuring out how to integrate donor visits with other priorities in a one-person office.

Anne Peyton CFRE has worked in and with not-for-profits for more than 30 years. Her career includes academic and medical librarianship, experiential education at Hurricane Island Outward Bound, organizational development, planning, and major gift (\$100,000+) and campaign fund raising (\$450,000 to \$200+million). At Yellow Brick Road Consulting, Anne works with a variety of social benefit, not-for-profits: conservation and the environment, youth, education, performing arts, cultural organizations, museums, hospitals, health care, social service agencies, professional associations, and more.

The Network is Us! Embracing Connectivity to Advance Mission

"Collective impact" and networks have fired the imagination of many in the nonprofit sector as they realize that organizations

are not necessarily the sufficient unit of change. And networks do not only exist outside of or beyond organizations. Organizations are networks, comprised of smaller networks, and operating within other larger networks, all living systems of connectivity, learning, alignment, and action. However, many organizations are not set up to maximize network potential. “Network” can be done in both low tech (in person) and high tech (virtual) ways, and all techniques are grounded in a mindset that understands that answers and solution reside in bringing diverse minds and skillsets together. In this session, participants will experience an interactive overview of network theory, thinking, and tools to advance their work in any domain. This will include core concepts, stories, roles, and techniques, delivered through a variety of media and conversation.

Curtis Ogden is a senior associate at the Interaction Institute. He has worked as an independent research, evaluation, and training consultant to a number of civic engagement and nonprofit support initiatives, including the Building Movement Project (currently housed at Demos), the Nonprofit Quarterly, and Tisch College of Citizenship and Public Service at Tufts University. Prior to joining IISC, Curtis was the Program and Knowledge Manager of the Building Excellent Schools Fellowship for aspiring urban charter school founders. In addition to his work at IISC, Curtis is an adjunct faculty member at Antioch University and a board member of the New England Grassroots Environment Fund.

Mistinguette Smith is a senior associate at the Interaction Institute. Prior to becoming a Senior Associate, Smith was an independent consultant, designing strategy with rural and urban agriculture organizations; facilitating environmental and health care leadership development programs; providing board training for LGBTQ, racial, gender and economic justice groups; and serving as an affiliated trainer and facilitator with IISC. A graduate of Smith College, she holds the MPA in Public and Nonprofit Management from New York University. She is also a poet, essayist, and founder of the narrative-based Black/Land Project.

Diversifying Funding Streams to Create Financial Sustainability

You’ve heard the adage “don’t put all your eggs in one basket.” Organizations that follow this principle in their fundraising practices build a sustainable fundraising program. Over the long run, donations are likely to grow and the organization tends to weather the hard times better. Diversification can be related to a number of characteristics: the type of donor; the amount they give; the giving venue, to name a few. In this interactive session, participants will look at four case studies to understand the types of diversification, how to analyze current funding streams, and how to set target funding streams and strategies to achieve organizational goals.

Cindy Bergvall is the Director of the accounting firm Bee, Bergvall & Co and a strategic consultant with its affiliate the Catalyst Center for Nonprofit Management. She enjoys pairing the financial analysis skills of the accounting firm with the strategic goals of her clients, to help them increase capacity, communicate clearly, and build sustainability. Cindy is on the Board of CB Cares and a member of the C12 Group. She has served as a grant reader for the Bucks County Women’s Fund and the Philadelphia Cultural Alliance.

Crafting Creative Solutions for Changing Needs

Technology makes it incredibly convenient for donors to give anywhere and anytime and enables more meaningful connections with stakeholders that many nonprofits have been unable to do in the past. The opportunities are extraordinary – and daunting! Working more and working harder won’t produce different results. How can you adapt your approaches and harness this power in creative, innovative ways? In this session, you will explore trends that are reshaping the world of nonprofit management, four to five creative tools and techniques to apply to organizational and technological challenges, see things in new ways and spark innovation, and craft up to 15-25 ideas on how to solve a host of challenges in an interactive, idea-sparking session.

Mary Schaefer is a strategist, change agent and fundraiser who has served in multiple leadership roles in academia, business and non-profit organizations. She is a Principal at Cornerstone Fundraising that offers more than three decades of development and stewardship experience along with extensive nonprofit management and strategic planning expertise. She guides nonprofit enterprises to make sense of their changing environment, clarify their vision and purpose, and adapt approaches to engage stakeholders, raise money, promote their causes and advance their social agendas. Previously, Mary was Founding Executive Director of the MIT Leadership Center.

Don Crane is an award-winning advertising Creative Director, Copywriter and Content Architect who understands the strategic value of challenging assumptions and breaking rules. He has developed branding, communications, customer loyalty, direct marketing, social media and web video campaigns. He also has conducted Creative Thinking and Creative Problem Solving training workshops for executives, managers and employees of Fortune 500 corporations, small and mid-sized businesses and non-profit organizations.

Succession Planning and Leadership Transition: Crisis or Window of Opportunity

Succession planning is a critical component of nonprofit sustainability. Organizations often have a plan for most contingencies—but often forget to plan for the inevitable change in leadership. Leadership transitions hold opportunities for transformative change, but also for organizational missteps. A core component of succession planning is building leadership throughout the organization, encouraging staff to explore their roles and responsibilities and providing opportunities for growth. This workshop will increase participants' understanding of the components of succession planning, share techniques for managing succession in ways that strengthen organizational capacity, lay out guidelines for board/staff roles, and provide the keys to successful transitions. Participants will leave the workshop with an actionable list of transition readiness factors and concrete steps to begin succession planning for their organizations.

Hez Norton, Director of Partnership & Leadership Initiatives, previously served as the executive director of Resource Generation, a national nonprofit that engages young adults with financial wealth in social change philanthropy. Prior to Resource Generation, Hez founded and was the executive director of North Carolina Lambda Youth Network. Hez also led the youth involvement program in the North Carolina Governor's Office and was a program officer for Learn and Serve America with the North Carolina Commission on National and Community Service. Hez brings experience as an interim executive director as well as a consultant to nonprofits in transition.

Nancy Jackson, MSW, is a certified facilitator, bringing 25 years of executive-level nonprofit and government experience to her practice. For 18 years she co-directed New England Network for Child, Youth and Family Services, a nonprofit intermediary organization that works to inspire innovation and advance best practices in work with children and adolescents. In the mid-1990s she was trained and certified in the Technologies of Participation facilitation methodologies developed by the Institute of Cultural Affairs (ICA). Impressed by the simplicity and power of these methods, she launched Gammy Bird Consulting to facilitate planning processes, staff retreats and executive transitions.

Crafting the Right Messages for Your Organization

We are each exposed to thousands of marketing messages everyday – in print, online, just about everywhere. How can nonprofit organizations carve out a distinctive place in the minds of their stakeholders? This workshop will break down the components of a compelling nonprofit brand and guide participants in the crafting and delivery of high-impact messages. Participants will learn to assess their audiences' perceptions, values, needs, and wants to achieve a range of outcomes including increased volunteer engagement, enrollment of new program participants, and stewardship of donors and funders. The workshop will additionally cover a range of essential tools to help nonprofits strengthen their brand identity through text, visuals, and in a range of other media. With increased confidence in designing and sharing messages, participants will be able to significantly expand their networks and bases of support.

Marjorie Bauer is an ESC consultant and former Senior Vice President of Market Research for Fidelity Investments. Her expertise includes strategic planning, brand positioning, and determining key marketplace trends as well as identifying insights into constituent needs, wants and expectations. Marjorie has provided consulting services to a number of nonprofit organizations including Centro Latino, a multi-service center serving the Latino population in and around Chelsea, Operation A.B.L.E. of Greater Boston, an employment service provider for mature workers, and NewTV, the community access television station of Newton.

Debra Yanofsky is an ESC consultant with extensive experience in the areas of marketing, governance, and fundraising. She has been with the Combined Jewish Philanthropies as Chair of the Elder Services and Teen Planning Committees, Co-chair of the Acharai Leadership Development Program, and was the recipient of the CJP 2011 Circle of Excellence Leadership Award. Debra worked as a Marketing Consultant and Marketing Director with Fidelity Investments, Director, Product Marketing with Harvard Community Health Plan, and Brand Manager with The Quaker Oats Company.

Logically Speaking: Using Logic Models for Planning & Evaluation

In this interactive workshop, participants will be introduced to the development and use of logic models, which have been demonstrated as an effective method of ensuring the success of programs. Logic models increase productivity by serving as a planning tool to develop and illustrate program concepts and approach. Using logic models will enable participants to visually explore and analyze assumptions in the planning process, and to illustrate program concepts and approaches. Through this approach, a shared understanding of program goals and methodologies and how these are related to the projected outcomes is created in an accessible form that serves as a guide for program staff and management, while also demonstrating program efficacy to funders and evaluators. Concrete examples, demonstrating how logic modeling has been implemented in one youth serving agency, will be used to illustrate the concepts being presented.

Irwin Nesoff is Associate Professor and Chair of the Department of Leadership and Policy. Nesoff is an experienced nonprofit administrator, serving as an executive in both nonprofit and government agencies. He has served on numerous nonprofit boards and was the founding President of the National Center for Creative Aging. He was executive director of an organization recognized by the United Way as one of five best-managed social service agencies in New York City. He serves as a volunteer consultant for the Experience Service Collaborative of New England. At Wheelock, he developed the curriculum for the Masters Degree in Organizational Leadership. Nesoff is a frequent speaker and workshop presenter on management issues affecting nonprofit organizations.

Briana Kneeland is Director of Development at For Kids Only Afterschool (FKO), a nonprofit organization that provides year-round out-of-school time programming in partnership with families, school and communities North of Boston. In her role at FKO, Ms. Kneeland manages fundraising, Board development, program planning, budgeting, and evaluation, and marketing. She has extensive experience in developing and utilizing logic models to guide effective program planning, implementation and evaluation practices. She holds Master's Degree in Organizational Leadership from Wheelock College and a Bachelor's Degree in Marketing from Bentley University.

A Real World Introduction to Outcomes Management

This session will introduce a framework for nonprofit outcomes management to improve organizational effectiveness. Participants will learn the basics of outcomes management, how to assess their organization's implementation of outcomes management practices, and how to use their mission to drive outcomes management. Participants will learn modern database system terminology and concepts, how to assess a program logic model, and how to assess their current database practices. They will learn about modern data systems like Salesforce as tools to track clients, programs, services and outcomes management. Finally, participants will plan possible steps for integrating the session's lessons into outcomes orientation in their own agencies, including how to advocate for strengthening their outcomes management system.

Ellen Bass has presented over 125 workshop sessions (both stand alone and as part of larger national conferences) on logic models, outcome measurement plans, or performance management, in Boston MA (1994 to present), Washington DC (annually 2003-2009), Atlanta (2011) and Albany (2010) GA, Memphis TN (2002), Philadelphia PA (2002). In 2011, Ellen facilitated Introduction to Performance Management at the United Way of Mass Bay's Annual Agency Meeting.

Steve Backman has more selectively worked on strategies and presentations on this topic, including partnering with Management Consulting Services on an multi-agency initiative comparable to the Capacity Institute, large scale planning with the Youth Advocacy Project, workshop panelist at the 2012 DeLoitte Day of Service conference on nonprofit program data effectiveness. In addition, Steve has conducted numerous trainings and helped others prepared training on getting started with Salesforce and other modern data management systems, with an emphasis on basic concepts for self-reliance and internally-driven adaption and growth. Steve also took part in the research team for Idealware's new scan of program data collection and assessment.

When Crisis Threatens – Lessons from the Field

This workshop will focus on using proven human and technological tools that will not only meet threatening agency challenges from funders, media, and lawyers, but will also renew the agency, safeguard funding, reinvigorate staff, and improve governance using lessons. Using examples of three successful interventions in major Massachusetts social sector organizations, board members will understand their responsibility to respond with new tools, and executive directors and senior managers will be prepared to head off or respond to crisis effectively and unify staff around the agency mission and the future. Participants will learn how to use crises as opportunities to reinvigorate their governance, reinvent funder relations, reenergize staff and refocus on their missions.

Christian Dame is a professional Interim Executive Director. He served as IED of three nonprofit agencies threatened with dissolution: The NE Center for Homeless Veterans, South Shore Housing and Community Development, and Greater Lawrence Community Development Corporation. In each case he strengthened governance, rebuilt funder relations, handled press and legal challenges, and reinvigorated staff leadership to prepare the path for successful permanent leadership. Chris has a Masters in City Planning degree from Harvard Graduate School of Design, has served in local and state government, and has been an independent consultant since 1986. He has been President of Non-Profit Transitions LLC since the firm's founding in 2004.