2014 MNN ANNUAL CONFERENCE OCTOBER 29

LEADING TODAY, TRANSFORMING TOMORROW

From finances and fundraising to managing your board and your brand, these workshops will provide you with everything you need to be more effective and efficient. Learn more about the workshops and presenters by clicking the titles below.

Workshops: Session I

Coaching Early Career Professionals: A Tool for Staff Performance and Retention

(A good fit for you if you're interested in leadership development, coaching, and/or management.)
The sector is only as strong as the employees behind it. But even with the expectation that the sector will need a large number of new leaders in the coming years, nonprofits must continue to allocate their resources to meet growing community needs, which can result in skimping on investment in talent support, growth, and retention. This workshop will present practical strategies for coaching early career professionals which will offer real-time growth opportunities for employees and provide greater return on performance and retention for organizations. Participants will discuss and practice coaching in the context of time- and resource-limited scenarios that represent where most nonprofit professionals work.

Presenter: Jenn Bender

Jenn Bender is CEO of New Sector Alliance, a national nonprofit organization that strengthens the social sector talent pipeline through fellowships for early career professionals committed to social impact careers. Before working with New Sector, Jenn was Executive Director of The Bridge Center, a therapeutic recreation organization, and Program Director at MGH YouthCare (now Aspire), which offers social skills supports for young people with Autism Spectrum Disorder. Jenn received her BA from Cornell University, Ed.M. from Harvard Graduate School of Education, and MBA from Babson College. She proudly serves on the Board of Directors of the American Camp Association and the Seven Generations Board of City Year Boston.

Presenter: Zack Dagneau

Zack Dagneau is Boston Program Manager at New Sector Alliance, a national nonprofit organization that enriches thesocial sector talent pipeline through fellowships for early career professionals committed to social impact careers. Before joining New Sector's team, Zack led Boston programs for the Academic Internship Council, and served as Research Associate and Internship Coordinator for Citizens for Responsibility and Ethics and as Program Instructor for Close Up Foundation. Zack received his BA from Albion College and MA from University of Toronto.

Collaborative IT for Small Budgets

(A good fit for you if you're interested in collaboration and/or innovation. Perfect if you work for a small nonprofit!)

The goal of this workshop is to introduce and apply Collaborative IT as a new model of technology management. Information technology is widely accepted as an integral part of contemporary management, but nonprofit organizations often see IT as a two-way back office function serving the staff, who then serve the clients, constituents, and other stakeholders. For organizations with large budgets, this model can work well. But small to medium sized nonprofits need a more economical model, which can often be handled by making day-to-day changes in the way certain aspects of Information Technology are managed. This workshop will demonstrate how Collaborative IT can improve technology cost efficiency for all types of nonprofits. It will help organizations develop cross-functional, inter-organizational collaborations that will use IT as a component of new programs and as a resource for outcomes measurement and performance management.

Presenter: David Gleason

David Gleason provides technical leadership and direction to enable nonprofit organizations to use innovative and effective information technology tools to serve human needs. An internationally published author of numerous articles on IT project management, technical professionalism, and information ethics, David has provided thought leadership through speaking appearances at industry conferences and customized training engagements. He has been serving a multitude of nonprofit organizations and companies since 1983 and has comprehensive, hands-on experience with technology adoption.

Presenter: Susan Labandibar

Susan Labandibar founded Tech Networks of Boston in 1994 to deliver reliable used computers to cash-strapped urban students who needed an affordable way to type college papers at home. Since those early days of crawling under desks searching for power outlets, Susan has continued to find innovative ways to deliver technology to the community while protecting the environment. Twenty years later, Susan and 45 other Tech Networks employees focus on building collaborative IT service partnerships with larger non-profit and for-profit organizations. Susan also volunteers for non-profit organizations, including 350 Massachusetts, the Climate Reality Project, Citizen's Climate Lobby, South Boston Grows, Interise and the Sustainable Business Network of Massachusetts, where she serves as President of the Board.

Presenter: Tom McLaughlin

Tom McLaughlin is the Principal at McLaughlin & Associates and has nearly 30 years of nonprofit experience as a nonprofit manager, trade association executive, and management consultant. Among his previous positions, he served as an executive with two major Massachusetts social service agencies and as Associate Director of the Massachusetts Council of Human Service Providers. Tom is on the management faculty at Brandeis University where he teaches mission-based management to MBA students. Tom is also a contributing editor for the Nonprofit Times, for which he writes a monthly column.

Developing 21st Century Leaders: Leadership Challenges and Opportunities

(A good fit for you if you're interested in leadership, strategy, and management)

Our global landscape is defined by hyper-competition, interconnectedness, complexity and change. Developing leaders who can be nimble and adaptive to perform effectively in this turbulent environment is an immense challenge. Our research examines the leadership development practices and initiatives that foster essential meta-competencies for success today. This fun, dynamic and interactive session will define the key drivers of change today, examine the core capabilities leaders need, and share some of the practical and relevant leadership development lessons and experiences for strengthening the current and future leadership pipeline.

Presenter: Jack McCarthy

Dr. Jack McCarthy is an Associate Professor of Organizational Behavior at the Boston University School of Management, where he also serves as the Director of the Executive Development Roundtable, a major consortium and research center on leadership. With research interests in leadership, creativity, organizational change, and global sustainability, his work has been published in leading journals and he is a frequent speaker and consultant on leadership and leading positive change. He teaches in the undergraduate, MBA, international and executive programs, and he was awarded the 2012 Broderick Prize for Excellence in Teaching at the Boston University School of Management, the school’s highest honor for teaching. With over fifteen years in corporate finance as a financial analyst, manager, and senior executive in operating divisions of Raytheon, Schlumberger and W.R. Grace prior to his career transition into academia, he draws heavily upon his real-world management and leadership experience in his teaching, research and consulting.

Donor Cultivation Events that Engage and Attract

(A good fit for you if you're interested in development, innovation, and/or strategy.)

An organization's strongest donors are usually those who are most involved. This workshop will explore the use of a non-traditional development vehicle to bring existing major donors closer to your organization while widening your overall pool of prospects. Two years ago, Families First started a series of content-rich cultivation events hosted in donor homes and targeted toward board members, major donors, other supporters, and their friends and neighbors. The goals of the roundtables were to give donors a better understanding of the power of the organization’s work, provide lots of opportunities for them to interact with the organization and each other, and give the organization access to new prospects. Because of their success, the roundtables have become a major component of Families First’s fundraising strategy. Through this workshop, Families First will share their strategy with other nonprofits looking to develop low-cost, effective cultivation programs.

Presenter: Liz Cohen

Elizabeth (Liz) Cohen joined Families First in January 2012 as its third Executive Director and chief fundraiser! Families First has had a well-developed individual donor program throughout its history and Liz has been instrumental in continuing to build on that record of success. She has over 15 years of experience in non-profits focused on a variety of public health issues, including violence prevention, comprehensive sexual education, and supporting families dealing with health complications. Prior to coming to Families First, Elizabeth was the Manager of Training at Planned Parenthood League of Massachusetts, where she oversaw all external training to teachers and health professionals, as well as internal training for over 200 staff members, including managers, health care staff, and educators. Her past work experience also includes a position with WGBH Boston as Director of Health Initiatives. While at WGBH, she worked on local and national outreach education campaigns focused on childhood asthma, cancer, caring for older parents, and heart disease. The first part of her career was dedicated to advocating for survivors of sexual violence and their significant others through positions at the Massachusetts Society for the Prevention of Cruelty to Children, Boston Area Rape Crisis Center, and Rape Crisis Services of Greater Lowell, where she served as Executive Director. Elizabeth has a BA from Tufts University and a Masters of Public Health from Boston University, where she developed and taught a course for four years on sexual violence. Her greatest achievement and joy is being the single mother of an amazing 5 year old.

Financial Storytelling: What Matters and Why

(A good fit for you if you're interested in communications and/or finance.)
Connecting mission and money in compelling and accurate terms is not always easy. And yet, the important programs and services of our nonprofit sector depend on financially healthy organizations and a clear articulation of resources and needs. This session will explore concepts that are essential to telling your nonprofit's financial story: What are the basic economics of the programs? How does the business model work? What financial strategies could help advance the mission? Participcants will explore how nonprofit leaders can use current historical financial data to craft a a robust narrative of revenue, expense, and balance sheet dynamics and how those dynamics inform organizational strategy. NFF will share insights into the nuances of nonprofit finance, highlighting the indicators of financial health that matter most. Via an interactive activity, participants will create their own financial stories tailored to their unique organizations and relevant to internal and external stakeholders.

Presenter: Beth Doreian

Beth Doreian is a Senior Associate in Advisory Services based in Nonprofit Finance Fund's (NFF's) New England office. Beth works with nonprofit clients throughout New England to provide insight into their financial stories and strategic advice. Prior to NFF, Beth held financial management roles with a premier social investment fund and an affordable housing developer. She holds an MBA from Simmons College.

Presenter: Alex Epps

Alex Epps is a New Sector Fellow in Advisory Services based in Nonprofit Finance Fund's (NFF's) New England office. In his one-year fellowship with NFF, Alex provides data analysis capacity for several projects. He is currently investigating the landscape of early childhood education providers in Philadelphia to aid foundations in better understanding and using financial data to inform grant-making. Prior to joining NFF, Alex worked in impact assessment on the frontier of social banking for three years at Root Capital, a nonprofit agricultural lender working with rural farmers in Latin America and Africa. Alex holds a BA in Economics from Brandeis University.

Maintaining Continuity, Inspiring Change: Best Practices for Board Recruitment

(A good fit for you if you're interested in governance and/ or strategy.)
Board recruitment addresses numerous top-of-mind issues for nonprofit organizations: expanding their networks, deepening fundraising capacity, and advancing the overall leadership and strategic direction. Yet too few organizations know how to undertake comprehensive and continuous recruitment and as a result, too many risk "board freeze." This workshop is designed to support organizations in targeted, as

well as broadly reaching recruitment, to address a range of priorities such as diversity, functional skills, and community connection. Participants will learn about the recruitment process from needs assessment and outreach to vetting, training, and continued engagement. The workshop will also touch on current data regarding demographic trends, interests, and motivations, so that participants will be better prepared to connect with individuals of different backgrounds. With new tools, templates, and information, participants will be better able to involve new talent and leadership in the organization's growth.

Presenter: Theresa Hamacher

Theresa Hamacher is an ESC consultant and President of NICSA, a nonprofit trade association serving the global investment management community. Theresa has extensive expertise in nonprofit governance, having served on boards for numerous organizations, including On the Rise and The Guidance Center, where she also served as President. She is author of “8 Habits of Great Nonprofit Boards: A Handbook for Smaller Nonprofits” forthcoming in 2014.

Outcomes Based Budgeting: How to Link Budgets to Impact

(A good fit for you if you're interested in finance, outcomes, and/or strategy.)

This session offers the introduction and subsequent building blocks to revolutionize the way your organization budgets. Outcomes based budgeting (OBB) helps organizations to better maximize their resources and provide stakeholders with transparent information related to how their dollars are being spent. This session will teach participantsa new way of budgeting that will help them make decisions based on the impact to their organization’s mission, rather than the impact to the budget; a system that enables budgets to be determined by which resources are critical to achieve organizational goals. The workshop focuses on the education behind the fundamentals of OBB and discusses the process and implementation, including how to help guide board and management decision making. The workshop contains a variety of participant discussion questions used to illustrate where organizations may be within the OBB process, and a supplemental case study as a take away for participants to practice the key concepts. Organizations that have "taken the plunge" and moved to OBB have seen improvement in financial standing while bringing the full organization and its mission into the budgeting process.

Presenter: Tim Warren

Tim Warren is a principal with CliftonLarsonAllen (CLA) and leads the not-for-profit group for CLA's Massachusetts offices. Tim's professional experience focuses on auditing, consulting, and strategy for not-for-profit organizations. He has extensive knowledge with both OMB Circular A-133 and the Massachusetts Uniformed Financial Statements and Auditor's Report (UFR). He has broad speaking experience and has presented at several of CLA’s Nonprofit Roundtable events as well as the Alliance for Children and Families CFO Roundtable.

Preparing Your Organization for the Future: Executive Succession Planning

(A good fit for you if you're interested in leadership, management. and/or strategy.)

Leadership transition is a time of both great vulnerability and possibility for organizations—and recent nonprofit surveys suggest that it will occur with unprecedented frequency in the next five years. How can your organization leverage this potentially positive opportunity for change, while still maintaining stability? This workshop is designed to offer strategies for guiding your organization through both anticipated and unanticipated executive leadership transitions. Participants will learn to assess organizational readiness for leadership succession, plan for an effective transition, and manage the transition process with both board and staff. We will cover a range of strategic and tactical topics including the review of the organization's vision, goals, and core values as they pertain to executive leadership; identifying critical knowledge, skills, and attributes of potential new candidates; and establishing a thorough selection and on-boarding process. Participants will leave with knowledge, tips, and tools to navigate executive transition and with recommendations for a comprehensive contingency plan in the event of such an emergency.

Presenter: Sue Ogle

Sue Ogle is an ESC consultant with extensive expertise in nonprofit training, change management, and leadership/organization development. Sue has 30 years of experience that include Founder of OGLE Training & Consulting, Assistant Director for Career Placement at Yale School of Management, and Managing Partner of Career/Life Alternatives. In addition, she was Northeast Regional Director for the American Society for Training and Development as well as ASTD President of the Southern CT Chapter.

Show and Tell: Using Data and Language to Write Powerful Grant Proposals

(A good fit for you if you're interested in communications, data, and/ or development.)

When writing a grant proposal to a private or public funder, nonprofit organizations have greater impact if they show AND tell their story. This workshop will focus on the importance of using highly descriptive narrative proposals that are enhanced by quantitative and qualitative data. The session will begin with a hands-on review of sample proposal narratives that highlight the powerful punch language and data can offer. Next, the session will focus on the importance of integrating SMART objectives into proposal plans that are specific, measurable, attainable, relevant, and time-specific. Participants will also learn about accessible data sources that can enhance their ability to make their case when pitching a program or service to a potential funder.

Presenter: Alison Glastein

In her leadership role at Freedman HealthCare, Alison Glastein has helped expand the firm's national footprint through strategic partnerships and marketing efforts. As the lead writer for many projects, she creates print and online content for clients' internal and external needs. Prior to Freedman, Alison spent fifteen years serving health and human services organizations in senior-level positions and as a consultant. She has demonstrated expertise when planning, implementing, and evaluating evidence-based health and education programs, with content knowledge in a range of public health issues. She also has a strong record of accomplishment creating successful grant proposals and concept papers in response to private, state, and federal guidelines.

Presenter: Gabriella Lockhart

As a writer and project manager at Freedman HealthCare, Gabriella Lockhart leverages her diverse background in public health, community development, and qualitative research to provide grant writing and project oversight to Freedman HealthCare and its clients. She is an experienced writer and has produced white papers and grant proposals on a wide range of health care topics. As a grant writer, Gabi manages all stages of the proposal development process, and helps clients transform their ideas into a compelling and fundable grant application. Her past experience with qualitative research and public health project coordination gives Gabi a unique perspective when preparing grant proposals on behalf of community-based organizations, community health centers, and other nonprofit organizations.

The Brand IDEA: A New Framework for Managing Nonprofit Brands

(A good fit for you if you're interested in communications, marketing, and strategy.)

We are seeing a paradigm shift in our sector—brands are no longer viewed simply as fundraising tools but are understood as strategic assets for mission implementation. This workshop will provide a new framework called the Brand IDEA that will help you to better understand and manage your organization’s brand in order to maximize mission impact. The Brand IDEA model provides participants with an opportunity to reflect on what a brand is, what it can do for a nonprofit organization, and how to best manage this strategic asset. Based on more than 100 field interviews, it is radically different from existing brand management models. This workshop will provide a clear understanding of how to use the Brand IDEA to engage stakeholders at all levels of the organization and create and empower brand ambassadors. Participants will actively engage in discussions and work in small groups to reflect on how to align their organization’s identity and image to maximize the role of their brand and reap the benefits their organization can derive from a well managed brand.

Presenter: Nathalie Laidler-Kylander

Nathalie Laidler-Kylander is a Lecturer in Public Policy at the Harvard Kennedy School where she teaches both degree program and executive education classes in Management, Leadership, and Decision Making. Nathalie's prior work experience includes several senior marketing positions in both the private and nonprofit sectors. She holds a BSc in Biochemistry, an MBA from Harvard Business School and a PhD from the Fletcher School at Tufts University. Her recent research interests continue to focus on the role of nonprofit brands and cross sector partnerships. Her most recent book publication is the Brand IDEA: Managing Nonprofit Brands with Integrity, Democracy and Affinity (www.nonprofitbrandidea.com).

The Spectrum of Collaboration-to-Merge Options

(A good fit for you if you're interested in collaboration and strategy.)

The goal of this session is to create a lively discussion about nonprofit mergers and collaborations, providing attendees the opportunity to reflect on their own experiences and organizations and think about practical ideas and new ways of looking to mergers and collaborations as part of a thoughtful growth strategy. Recent Bridgespan research found that 20 percent of nonprofit leaders consider mergers as part of their strategy; more than 60 percent were already engaging in some form of collaboration. Combining forces can be the best way to deliver more, higher quality services with greater effectiveness and efficiency. Mergers and collaborations can strengthen a field—they can rapidly scale a proven approach, streamline operations, add new capabilities and opportunities to access more clients, and stem needless reinvention. Attendees will walk away from this workshop with an understanding of: how to navigate traps & challenges (blending boards, staff, brands); the spectrum of collaborations-to-merger options (learning from case studies); and how to choose the right collaboration model for their organization.

Presenter: Cristina Botero

Cristina is a Consultant in Bridgespan’s New York office. Her recent work has included nonprofit growth strategy, philanthropic initiative design and thought leadership/influence strategy. Recently, Cristina has worked on initiative design and planning for the Bill and Melinda

Gates Foundation to develop a postsecondary education grant making strategy and the Rockefeller Foundation to assess the methodology of social innovation labs as a means for accelerating social impact. She also co-authored an article for Stanford Social Innovation Review on mergers in the nonprofits sector ("Why Nonprofit Mergers Continue to Lag", SSIR, February 2014). Cristina earned her B.A. from Brown University, where she studied International Relations with a focus on political and economic development.

Presenter: Maria Orozco

Since 2006, Maria Orozco, a manager at the Bridgespan, Grouphas helped lead a variety of nonprofit and foundation strategy engagements, with a focus on education and youth development. Maria co-leads Bridgespan's Funding Capability area and is helping to lead new research on nonprofit mergers and collaborations. She has co-authored "Why Nonprofit Mergers Continue to Lag," SSIR, Spring 2014. Maria holds a master's degree in Public Policy from Harvard's Kennedy School of Government with a concentration in Human Resources, Labor, and Education. Maria also holds a bachelor's degree from Princeton University in Art History and a certificate in Spanish Languages and Literature, and was a recipient of the Mellon Minority Undergraduate Fellowship.

Workshops: Session II

A Breath of Fresh Air: How to Engage Young Professionals as Board Members

(A good fit for you if you're interested in governance. leadership, and/ or strategy.)

Young professionals bring a unique set of skills, beliefs, and experiences that can have a tremendous impact on a nonprofit, but they may be looking for a more active role than the traditional Board member and their presence on the Board can challenge the dynamics of veteran members. This workshop will explore strategies for recruiting, training, and utilizing young professionals as active and engaged Board members. Using ZUMIX as a case study, the workshop will lay out a strategy that takes prospects from recruitment, to on-Boarding, to clearly defined committee roles. Through group discussion, presenters will address the unique challenges that come with engaging young professionals and explore methods for embracing the energy and skills that this demographic brings to the table. After this workshop, attendees will be able to articulate what they are seeking in Board members, develop a recruitment strategy including a written description of the opportunity and an Open House event, and steward individuals from prospects, to committee members, and onto the Board.

Presenter: Madeleine Steczynnski

Madeleine Steczynnski founded ZUMIX in 1991 in response to the worst year of violence in the City of Boston's history. Together with ZUMIX's Board of Directors and Youth Advisory Board, she has grown ZUMIX from a kitchen table project into a vital East Boston community institution. In 2008 Madeleine spearheaded a development team in the acquisition and full renovation of an historic firehouse as a new home for ZUMIX. In 2009 she successfully completed a $4.6 million dollar capital campaign and moved ZUMIX into its new home. In 2011 Madeleine started a 3-year learning journey as a prestigious Barr Fellow. Madeleine attended Boston College, the School of the Boston Museum of Fine Arts - Boston, and the Executive Leadership Program at Harvard University.

Presenter: Nikki Stewart

Nikki Stewart has over ten years of experience in the nonprofit sector in roles that include development, communications, and legal services. Currently serving as the Development Manager at United South End Settlements, she also volunteers as a Fundraising Committee member with Future Chefs and as a puppy wrangler at The Sato Project. Nikki previously served as the Director of Development at ZUMIX, a youth arts and technology program in East Boston.

A Leader's Guide to Inspiring Others to Action

(A good fit for you if you're interested in leadership and management)

In 2014, effective nonprofit leaders must be able to answer the following questions: What inspires you? Why do you need to inspire people? How do you get people on board and fired up to succeed? How do you keep them motivated in the long haul? This high energy, dicussion based clinic will show leaders how to inspire their staff to action. We will differentiate motivation from inspiration and help leaders define and play their essential role in getting staff on board with new initiatives and programs. The workshop will encourage new thinking and action that will help leaders focus their efforts on finding the spark of motivation for each employee and determining how to keep it lit. Leaders will leave the session with practical tips to inspire others to action by getting them fired up now and motivated to keep the flame lit over the long haul.

Presenter: Kenya Rutland

Kenya Rutland is a passionate and trustworthy consultant who uses his diverse skills and talents to increase confidence, motivation, and performance of others. He has been described as the "Chief Enthusiasm Officer" and is a catalyst for learning and organizational development. Kenya is a persuasive facilitative leader who uses keen business acumen to build commitment and accountability among staff at all levels of any organization. Kenya has nearly 15 years of training and development experience and has been privileged to work with global clients in nonprofit, government, and corporate. He attended the University of Georgia and holds various learning and development certification.

Head in the Clouds: Choice and Lessons in Moving Nonprofit Data and Technology to the Cloud

(A good fit for you if you're interested in data, innovation, and/ or strategy)

How does a century-old national organization leave a data center for a new technical infrastructure entirely in the cloud? Very carefully. Learn about the cost-benefit analysis, strategic planning and goals, along with key technical considerations, that Hadassah used when it divorced itself from its client-server structure for cloud-based phone, email, virtual desktops, database applications, and nonprofit CRM. Organizations can benefit from the case study of this slow-and-strategic process Hadassah used to make such a significant leap. A strategic partner in the process, ClearView CRM developer SofTrek Corporation, will describe how it applied best practices gained from other cloud-based clients in shifting Hadassah's donor database, donor services operational functions, and CRM application. We will explore the reasons for moving to the cloud, how to gauge readiness, and outline the steps involved.

Presenter: Steve Birnbaum

Steve Birnbaum has more than 15 years' experience in nonprofit management, with particular expertise in organizational planning, technology implementation and change management. He previously was associated with Jacobson Consulting Applications (JCA), a firm helping nonprofits use technology effectively to achieve fundraising goals. Steve joined SofTrek Corporation in 2010, and develops its sales and implementation strategies and oversees client services. Steve has presented to the fundraising community in numerous venues: Fundraising Day in New York, the Association of Healthcare Philanthropy's international conference, APRA's (Association of Professional Researchers for Advancement) annual conference, the Nonprofit Technology Conference, AFP Massachusetts and others. He is author of the recent article "Eight Steps to a Culture of Fundraising" for Musical America magazine.

Presenter: Lynn Blackwell

Lynn Blackwell manages Hadassah's IT effort, including infrastructure, for its New York City headquarters and 45 field offices worldwide. Lynn specializes in donor database management with a focus on donor relationships from the qualifying and identifying stage, to stewardship. She partners with many volunteers to foster a database synergy with the goal of cultivating donors from grassroots to major gift level. Lynn plays a pivotal role in the nonprofit industry, translating the needs of non-technical Major Gift Officers into a usable electronic format so development leadership and financial reports (pipeline, revenue projection) can be easily and effectively managed.

How to Tell Stakeholders What They Need to Know

(A good fit for you if you're interested in communications and strategy.)

When you communicate with stakeholders, does it make a difference? This workshop will explore the new requirements for lean, focused, prioritized communications that contribute to tangible outcomes in an age of limited resources and growing challenges. The framework for this workshop will be the acclaimed book "Leap of Reason," a compendium of essays and tools focused on the theme of "Managing to Outcomes in an Era of Scarcity." Participants will learn approaches and tools that can be used to: convey information using data (without the pitfalls of too much information); provide evidence-based communications that establish an organization as focused on results rather than process; make strong connections between the work of the organization and the outcomes it achieves; and convey a vision for systemic change. The workshop will feature commentary from several field practitioners and a no-nonsense primer on how nonprofits connect effectively with stakeholders. Participants will be able to get free copies of "Leap of Reason" for themselves, their colleagues, and their boards.

Presenter: Michael McWilliams

Michael McWilliams is the managing director of Rapporteur, a communication and publishing agency for mission based organizations. A veteran public affairs strategist, tactitioner, and writer, he has worked globally across the nonprofit, NGO, policy, philanthropic, and corporate sectors.

Knowledge Management for Small Nonprofit Organizations

(A good fit for you if you're interested in management and strategy for small nonprofits.)

As a small nonprofit grows, a challenge often encountered is how to manage the knowledge so critical to the organization's mission. Small nonprofits are tasked with managing this disparate knowledge when a staff member leaves, when there are multiple versions of a document, and when it is hard to locate key information -- all while sticking to a tight budget. This session will help participants consider reasonable options for a nonprofit organization with an annual revenue of approximately $250K. Workshop attendees will learn knowledge management approaches and strategies that are available to nonprofit organizations, and review how they might apply to their organizations.

Presenter: Deborah Elizabeth Finn

Deborah Elizabeth Finn is a strategist and consultant who lives to bring resources and needs together seamlessly for nonprofits and philanthropies, mostly through strategic use of information and communication technologies. She always bears in mind that the technologies used should be supporting your organization's mission, rather than driving you crazy. Deborah's highest priority is fulfilling each organization's mission. Building collaborative relationships is her second priority. The latest technology gadgets rank very low on her list of concerns. Deborah holds degrees from Bennington College and Harvard University.

Presenter: Jim Fisk

Jim works as a Drupal Developer and Project Manager at Annkissam. He is passionate about leveraging open source technology to create custom web applications that support the unique workflows of a variety of nonprofits. He is an active participant in Drupal community, attending conferences and code sprints that move open source software forward. He is an advocate for creating a more accessible web and focuses his design process on ADA Compliance. Jim graduated from the Isenberg School of Management at UMass Amherst and spent his early career in enterprise data storage. Jim is also an eagle scout and volunteers at the Alzheimer's Association in Watertown, MA.

Presenter: Mollie Murphy

As a co-founder of Annkissam, Mollie Murphy specializes in policy, operations, and work flow for Financial Management Services. Mollie enjoys working with clients to improve efficiency, transparency, and compliance in their Financial Management Services, and especially for fiscal/employer agent services. Mrs. Murphy also serves as the Director of Financial Management Services at the National Resource Center for Participant-Directed Services at Boston College (previously the National Program Office for the Cash and Counseling Program). She is a junior fellow with the University of Pennsylvania's American Academy of Political and Social Science and graduated Summa Cum Laude with Highest Honors in Economics from Clark University.

Presenter: Kevin Palmer

Kevin Palmer has been working with New England-area nonprofits since coming to Boston in 2006. He was an Americorps*VISTA working with community and education-based nonprofits for several years before joining Annkissam. Kevin develops web applications to help nonprofits manage their information and knowledge. He enjoys working with organizations to determine their information management goals and translating those requirements into intuitive, sustainable systems. Kevin also leads the Drupal practice at Annkissam.

Outcomes Management and a Culture of Change

(A good fit for you if you're interested in outcomes, data, and management.)

How can your agency move beyond estimating outcomes data for funder reports at the last minute? How can you better educate funders about the resources it takes to achieve real participant outcomes? How can you use this information to better meet your organization's mission? This workshop introduces the essential steps of nonprofit outcomes management. As an alternative to having funder requirements drive data collection and reporting, this workshop will offer a framework for using participant outcomes data to improve programs, engage staff in culture change, and enable leadership to make better decisions. Plus, funders will be thrilled with your organization's outcomes data. The workshop will include: introduction to 17 outcomes management practices, including a self-assessment tool; a live case study describing the culture change process and how they overcame barriers; exploration of common obstacles to implementing an outcomes management system; and small group work to develop an organizational readiness plan,for participants to implement in their agencies.

Presenter: Steve Backman

Steve Backman has worked on technology strategy for nonprofit and related organizations for twenty-five years. As principal of Database Designs, Steve has assisted many local organizations on distinctive data systems using technologies ranging in time and era from Microsoft Access to Salesforce. In recent years, he has worked closely with Ellen and the Capacity Institute on technology strategy and implementation for tracking participant outcomes and supporting a performance management culture. Steve has undertaken many client trainings and conference workshops effectiveness with data. He serves on the board of Idealware, contributing to its recent research scan of program data and assessment software.

Presenter: Ellen Bass

Ellen Bass is the Director of the Capacity Institute, a program of the Black Ministerial Alliance of Greater Boston (BMA), which helps nonprofits build performance management systems, leading to improved measurable participant outcomes. Since 2002, she has helped the BMA raise and redistribute more than $10 million in grants and capacity-building services to youth agencies in Boston. With an MBA in public and nonprofit management, Ellen has served in resource development for 15 years and in program development for 30 years, focusing on logic models and outcome measurement plans, in both secular and faith-based organizations.

Recurring Donors: A Winning Approach

(A good fit for you if you're interested in development and strategy.)

Monthly giving is buzzing. If you're considering starting a program to retain your annual fund donors, or grow an already existing recurring giving program to the next level, this session is for you! You'll hear examples of how important monthly programs have become for nonprofits and how much these donors can add to an organization's bottom line. Pariticipants will come away with strategies and practical tips to start or grow their programs including the best way to ask for monthly gifts, smart ways to organize the back end of a monthly giving program, who your prime prospects are, how to create online appeals to generate credit card recurring donors, and more.

Presenter: Erica Waasdorp

Erica Waasdorp, President of A Direct Solution (www.adirectsolution.com) can be considered a Philanthropyholic. Her experience in monthly giving has given her an edge for with clients who are ready to embark on this way of giving. Erica started A Direct Solution in December of 2003 with more than twenty years of experience in direct marketing, from both sides of the desk—the client side and the agency side. She has since worked with numerous nonprofit clients, helping them with their annual fund campaigns, monthly giving, grant-writing, events, and public relations. She contributes to industry publications, in the US and abroad, and has spoken at various conferences. In 2012, she published her first book “Monthly Giving -The Sleeping Giant” and she is currently working on her second book, due out in 2015.

The Why and How of Asking for Money

(A good fit for you if you're interested in development, communications, and/ or strategy.)
By combining elements of the growing body of research that shows how donors feel when they give with tried and true solicitation techniques, this session is designed to help smaller organizations that may not currently be participating in major gifts to jump on board. We know... most people have all sorts of angst around asking for gifts in-person. What if the donor says "no"? Ironically, more "no's" translate into more money. Find out why! The goal of the workshop is to give participants the confidence to get out the door to ask qualified donors for a gift. Participants will look at how to determine the solicitation amount, set-up the visit, make the "ask", and handle objections.

Presenter: Diane Remin

Designated among the top 30 fundraising consultants in 2012, Diane Remin is the Founder and President of MajorDonors.com , which helps small-to-mid-sized nonprofits boost fundraising revenues. The company offers both consultative and outsourced development solutions. An active solicitor herself, Diane has served on nonprofit boards for the past 15 years. 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. Diane likes to remind everyone that giving is good for your health-and can back it up!

Tying Mission and Finances Together to Chart Your Strategic Choices

(A good fit for you if you're interested in management, finance, and/ or strategy.)
The role of executive staff and board members is to understand the intersection between financial viability and the impact of achieving your organization’s mission. It is this intersection that can mean the difference between an organization existing or thriving. This workshop will explore an innovative approach to strategic planning that provides a very clear picture of how your programs are supporting your mission. So many times, organizations are running programs that are not feeding their mission, are not financially feasible, or both. Using the Mission Margin Matrix, an organization can clarify how the organization functions as it relates to its mission. In this engaging presentation, participants will be presented with a concrete way to look at their organization and validate whether the organization’s programs are aligned with the mission and are providing impact in a financially viable way. We will show participants how to do this by creating a mission / margin matrix and using it effectively. This can serve as the starting point for strategic planning or as an ongoing evaluation of your organization's effectiveness and financial sustainability.

Presenter: Sharon Danosky

For 30 years, Sharon Danosky, founder and president of Danosky & Associates, has dedicated her career to working with not-for-profit organizations. As both a consultant and a senior executive for numerous charitable organizations, she has transformed organizations into highly effectively charities of choice. Through a well-honed skill set that includes strategic planning, fund-raising, and tactical marketing, coupled with her passion and vision, she has guided not-for-profits in their quest for achieving that "next level", thereby fulfilling their mission and their promise to the community. Sharon has served on numerous Boards, including NEAHP and AFP and speaks locally, regionally, and nationally.

Presenter: Christine P. Lent

Christine P. Lent is an experienced certified public accountant, and has been providing financial management services to both for-profit and non-profit organizations for over three decades. She recently formed BlueRoc Financial Management Services, LLC, offering financial guidance to small and mid-sized companies. Christine has further expanded her scope by joining forces with Danosky & Associates to help nonprofit organizations develop and streamline their financial systems, business processes, and reporting so that they can unlock their full potential and fulfill their missions.

Video Storytelling and Social Media: A Match Made in Heaven

(A good fit for you if you're interested in communications and strategy.)

Nonprofits know they need to create video, but too often they are at a loss when it comes to planning, production, and promotion. According to a study done by Google, 57% of people who watch nonprofit videos go on to make a donation. However, many nonprofits do not have a viable, sustainable video strategy — one that takes them from the planning stage to promotion and beyond. The goal of this workshop is to think through a video strategy, from pre-production to promotion that will work for your nonprofit. The focus of this presentation will be developing concepts and ideas for nonprofit videos as well as promotion on social media channels; it will not address the technical aspects of video production and editing. This workshop will detail key steps to consider when crafting your organization's story on video; how to integrate video into your existing marketing and fundraising plans; and tips and tricks to promoting your videos on social media channels. The workshop will incorporate current video and social media examples from nonprofits.

Presenter: Julia Campbell

Julia Campbell has a long history of helping nonprofits find success online. After 10 years in the nonprofit sector as a development director and marketing coordinator, she founded J Campbell Social Marketing, a boutique digital marketing agency based in Beverly, MA. A returned Peace Corps volunteer, a mom, and lifelong volunteer, Julia helps nonprofits connect with donors by effectively harnessing the power and potential of online marketing and social media tools. Her blog was named one of the Top 150 Nonprofit Blogs in the world and she is included in the Top 40 Digital Strategists in Marketing for 2014.

Presenter: Rachel Jellinek

Rachel Jellinek is a partner at Reflection Films, an award-winning video production company. Prior to Reflection Films, she worked on educational campaigns at the Massachusetts Department of Public Health, as a health educator for children, as a director for a literacy program, and as a community relations liaison at MIT. Her experience in the nonprofit world lends itself to understanding how to tell client stories in an emotionally compelling and entertaining way.