



Conference Schedule

Join us for our most anticipated event of the year! The buzz is still alive from last year's conference, and we have developed even more great content, networking and growth opportunities for this year's event.

This year's theme is **ENGAGE**, featuring two full days of relevant programming with a lens towards innovation, equity and advancement of thought and skills through several keynotes and over 40 deep-dive and breakout sessions.

This conference offers something for everyone, from EDs/CEOs, to development teams, to program staff, and even board members. Join your colleagues for both days, or pick and choose which day works best for you. Either way, we are looking forward to seeing you in August!

Day One: Wednesday, August 21, 2019
(Breakfast & Networking - 7:30am to 9:00am, Program - 9:00am to 4:00pm)

Day Two: Thursday, August 22, 2019
(Breakfast & Networking - 7:30am to 9:00am, Program - 9:00am to 4:00pm)

Location: Desert Willow Conference Center
4340 E Cotton Center Blvd
Phoenix, AZ 85040

Website: www.AZNonprofitConference.org

The full conference schedule, details and breakout descriptions can be found on the following pages.



Register at AZNonprofitConference.org

Day 1 – Wednesday, August 21 Schedule

7:30am-9:00am	Registration, Networking, Breakfast & Visit Exhibitors
9:00am-9:45am	<p><i>Opening Session & Morning Keynote:</i> <i>Nonprofit Impact Matters: How America's Charitable Nonprofits Strengthen Communities and Improve Lives</i> Tim Delaney, National Council of Nonprofits</p>
9:45am-10:00am	Break
10:00am-11:15am	<p><i>Morning Breakout Sessions (1-9)</i></p> <p>1 – CEO/Board Chair Partnership: A Case Study in Engagement (Bruce Weber & Charlie Smith, Weber Group, Katherine Cecala, Junior Achievement)</p> <p>2 – How to Engineer Change Through Your Vision (Catherine Alonzo, Javelina)</p> <p>3 – On My Own: Running a Small Nonprofit (Karolyn Benger, KB Enterprise)</p> <p>4 – Audience Engagement: The Key to Creating and Building Your Social Channels (Suzanne Berrios & Virginia Nelson, PetSmart Charities)</p> <p>5 – Leveraging Neuroscience to Make Feedback Work, Shift Culture, and Feel Better (Sarah Griffiths, The Next Chapter Consulting and Coaching)</p> <p>6 – LGBT Workplace Inclusion (Wallace Hudson, one-n-ten)</p> <p>7 – Understanding Indirect Cost and the Impact on Grants (Nicole Lettini, eCivis, Inc)</p> <p>8 – Strengthening Organizations Through the Strategic Engagement of Women Donors (Michele Rebeor, CCS Fundraising)</p> <p>9 – Building A Diverse & Inclusive Board (Moderator: David Martinez III, Vitalyst Health Foundation – Panelists: Angela Hughey, ONE Community, Adam Lopez Falk, Valle del Sol, Jason Wong, Asian & Corporate Entrepreneur Leaders)</p>
11:15am-12:15pm	Lunch, Networking and Visit Exhibitors
12:15pm-12:45pm	<p><i>Luncheon Keynote:</i> <i>Building A Bright Future Together</i> Sybil Francis, Ph.D., Center for the Future of Arizona</p>
12:45pm-1:00pm	Break
1:00pm-3:45pm	<p><i>Deep Dive Afternoon Sessions (1-2)</i></p> <p>1 – Sunshine On A Cloudy Day: Preventing, Planning For, and Mastering Crisis Communications Events (Paul Allvin, Cloud-2-Ground)</p> <p>2 – The Arizona We Want Community Conversation (Kristi Tate – Center for the Future of Arizona)</p>

1:00pm-2:15pm	<p><i>Afternoon #1 Breakout Sessions (3-9)</i></p> <p>3 – Executive Roundtable Discussion: Overhead (Facilitated by Geri Wright, Act One Foundation & Michael Barry, Organizations for Nonprofit Executives ONE)</p> <p>4 – A Café with a Cause: A Sustainable Mission Forward Model (MaryEllen Clausen, Ophelia’s Place)</p> <p>5 – Financial Leadership for Nonprofit Organizations (Harriet “Hatsy” Cutshall, Your Part-Time Controller LLC)</p> <p>6 – Working Board Warriors (Julie Eber, YNPN-Phoenix)</p> <p>7 – Are Founders Hiding in Your Organization? (Patrick McWhortor, The Cosanti Foundation, Stephanie Small, Synergy Partners Consulting & Pam Gaber, Gabriel’s Angels)</p> <p>8 – Fundraising: Whose Job Is It, Anyway? (Cheryl House, The Phoenix Philanthropy Group)</p> <p>9 – Design Thinking and Social Innovation (Scott Morrissey, Valley of the Sun United Way)</p>
2:15pm-2:30pm	Break
2:30pm-3:45pm	<p><i>Afternoon #2 Breakout Sessions (3-9)</i></p> <p>3 – The 3 L’s Learn-Love-Lead (Kimberly Hall, Circle the City)</p> <p>4 – Is It Time to Swipe Right? How and When to Consider a Collaboration with Another Nonprofit (Nora Hannah, Together for Impact Fund)</p> <p>5 – Content Creation and Diversity: Moving Towards Inclusion Through the Use of Story and Shared Narrative (Stephen Hodges, Magic Synapse Productions)</p> <p>6 – Engaging and Cultivating Millennial Donors (Julia Patrick, American Nonprofit Academy)</p> <p>7 – Shape Arizona’s Future: Start Here (Jannah Scott, US Dept of Commerce, Census Bureau)</p> <p>8 – Attract, Engage, and Retain Employees (Stephanie Waldrop, Employee Benefits International)</p> <p>9 – How Rockstar Leaders Cultivate Growth (Molly Coke, Firespring)</p>

Day 2 – Thursday, August 22 Schedule

7:30am-9:00am	Registration, Networking, Breakfast & Visit Exhibitors
9:00am-9:45am	<p><i>Opening Session & Morning Keynote:</i> <i>Graduating from the Kiddie Table: How to Stand Up, Speak Out and Claim Our Seat as Equal and Collaborative Community Partners</i> Kristen Merrifield, Alliance of Arizona Nonprofits</p>
9:45am-10:00am	Break
10:00am-11:15am	<p><i>Morning Breakout Sessions (1-9)</i></p> <p>1 – The Workplace as an Engagement Tool (Kathy Foster, Keith Perske & Rob Vantuyle, Colliers)</p> <p>2 – Moving from Exhausted Leadership to Effective Leadership (Tiffanie Dillard & Tara Bethell, Avenir Consulting Partners)</p> <p>3 – Taking the Right Steps Toward Nonprofit Sustainability (Beverly Browning, Bev Browning LLC)</p> <p>4 – How to Crush Nonprofit Marketing With Limited Staff, Budget, and Time (Bianca Buliga, SEED SPOT)</p> <p>5 – Creating and Managing an Endowment Fund (Ellis Carter, Caritas Law Group PC)</p> <p>6 – Envision, Establish, and Execute: Engaging Your Stakeholders to Create and Achieve Your Strategic Plan (Lisa Deane, State Bar of Arizona & Donita Douglas, InReach)</p> <p>7 – Community Cultural Wealth (Dr. Jeff McGee, Cross-Cultural Dynamics LLC)</p> <p>8 – Ten Real Estate Rules Every Nonprofit Should Know (Carolyn Sechler, Sechler Morgan CPAs LLC & Beth Jo Zietzer, ROI Properties)</p> <p>9 – Advocacy Roadmap: Making “Cents” of Your Advocacy Plan (David Martinez III, Vitalyst Health Foundation)</p>
11:15am-12:00pm	Lunch, Networking and Visit Exhibitors
12:00pm-12:45pm	<p><i>Luncheon Keynote:</i> <i>Preserving the Charitable Deduction: How We Got Here & Where We Go From Here</i> Panel Discussion – Kristen Merrifield, Alliance of Arizona Nonprofits, Laurie Liles, Arizona Grantmakers Forum, Brandy Petrone, Goodman Schwartz Public Affairs, Penny Allee-Taylor, Valley of the Sun United Way</p>
12:45pm-1:00pm	Break
1:00pm-3:45pm	<p><i>Deep Dive Afternoon Sessions (1-2)</i></p> <p>1 – Dirty Money: Ethics In Nonprofits (John Scola, Boys & Girls Clubs of Metro Phoenix)</p>



2 – Nonprofit Succession Planning: Creating A Continuity of Leadership to Advance Your Mission (Jeffrey Wilcox, Third Sector Company & Steve Browning)

1:00pm-2:15pm

Afternoon #1 Breakout Sessions (3-9)

3 – Executive Roundtable Discussion: Topic TBD (Facilitated by Michael Barry, Organization for Nonprofit Executives ONE)

4 – Building the Capacity Ecosystem (Jennifer Bonnett, Nonprofit Lifecycle Institute)

5 – What Young Nonprofit Professionals Need to Engage Fully in the Sector (Julie Euber, YNPN Phoenix)

6 – Engaging Through Team Dynamics (Jerry Houston & Laura Dillingham, HPISolutions)

7 – How to Spot and Solve Nonprofit Burnout (Laura Ingalls, Abeja Solutions)

8 – Three Things All Nonprofits Should Know About Cyber Security to Avoid Scams, Threats and Disasters (Ivan Leger & George Heiler, Nerds on Site)

2:15pm-2:30pm

Break

2:30pm-3:45pm

Afternoon #2 Breakout Sessions (3-9)

3 – C-Suite Panel & Discussion (Moderator: Michael Barry, Organization for Nonprofit Executives ONE - Panelists: Tom Egan, Foundation for Senior Living, Torrie Taj, Child Crisis Arizona)

4 – Create and Successfully Present Your Giving Season Plan (Brianna Klink, Abeja Solutions & Terri Shoemaker, Association of Arizona Food Banks)

5 – Stress, Trauma, and the Trauma-Informed Approach (Claire Louge, Prevent Child Abuse Arizona)

6 – ROI & True Sustainability: Moving Beyond the 3 G's – Golf, Galas, and Giveaways (Tom Ralser, Convergent Nonprofit Solutions)

7 – The Road to 100% Digital Marketing (Todd Vigil, The Phoenix Symphony)

8 – How to Master Media Interviews (Keith Yaskin, The Flip Side Communications LLC)

9 – How to Build a Social Enterprise or Earned Revenue Strategy for Your Nonprofit (Kristiana Fox, Think Outside the Box LLC & Kay McDonald, Charity Charms)



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Day 1 Speakers – August 21, 2019

Morning Keynote – 9:00-9:45am

Title: Nonprofit Impact Matters: How America's Charitable Nonprofits Strengthen Communities and Improve Lives

Speaker: Tim Delaney – President & CEO, National Council of Nonprofits

Description: Since 1776, Americans have declared our independence in various ways, whether crooning in New York that “I did it my way” or bragging out West about our “rugged individualism.” Even in the nonprofit sector, where we bring people together for the common good, the incentive structures – donations, grants, media coverage – reward being different, reinforcing fragmentation and diminishing our collective power. But what if the 12.3 million nonprofit employees across the country, more than 64 million nonprofit board members and volunteers, and tens of millions of donors supporting the work of nonprofits saw what they share in common and how their interests are aligned? Let's explore and find out...



Speaker Bio: Tim Delaney is President & CEO of the National Council of Nonprofits, the leading resource and advocate for America's charitable nonprofits that connects the largest nationwide and sector-wide network of nonprofits, with more than 25,000 organizational members – including the Alliance of Arizona Nonprofits and its members. He's an accomplished attorney and policy advocate who has successfully argued in the U.S. Supreme Court, testified before Congress, and negotiated in the White House.

Tim began his career in Arizona as a litigator at a large law firm, where he helped prosecute the impeachment of a Governor, protected and advanced civil rights, and led the firm's government relations practice. He served as Arizona's Solicitor General and later Chief Deputy Attorney General, leading the state to win four out of four cases in the U.S. Supreme Court and prosecuting the removal of elected officials for breaching the public trust. Tim also founded and led the Center for Leadership, Ethics & Public Service, championing ethical leadership and civic engagement while working with Attorneys General, judges, nonprofits, and others across the country. And he was a co-founder and an Interim CEO of the Alliance of Arizona Nonprofits.

Since 2008, Tim has drawn on those diverse experiences as he leads the National Council of Nonprofits, which links front-line nonprofits across the full spectrum of nonprofit missions and sizes, providing the Council with real-time information about what's occurring “on the ground.” The Council is the only national, sector-wide group that integrates policy analysis and advocacy both vertically (local, state, federal) and horizontally (legislative, executive, judicial) on issues of mutual concern to all subsectors of the 501(c)(3) community, such as regulatory oversight, property-tax exemptions, employment law, and much more. The Council looks out for the common good of the entire sector – and focuses especially on the health and well-being of small and mid-sized charitable nonprofits – as it takes the lead on legal analysis, strategic advocacy planning, message framing, and mobilization.

Since graduating from Yale and earning joint degrees in law and public affairs from the University of Texas, Tim has helped nonprofits from a variety of vantage points. He's served as board chair of Valley Leadership, co-founder and later board chair of Valley Citizens League, an adjunct faculty member at ASU teaching graduate courses on “Leadership and Ethics in the Nonprofit Sector,” national Training Fellow for the nonprofit Center for Lobbying in



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Day 1 Speakers – August 21, 2019



the Public Interest, member of the national Leadership Council of Nonprofit VOTE, and Steering Committee member for the international Affinity Group of National Associations.

A sought-after speaker, Tim has made hundreds of presentations for a diverse range of groups, both domestically and internationally. He writes extensively about advocacy, current events, nonprofits, and public policy.

Additionally, he has been interviewed for his analysis and commentary by, among others, ABC News, *Chronicle of Philanthropy*, CNBC, CNN, C-SPAN, NPR, *New York Times*, *USA Today*, *Wall Street Journal*, and *Washington Post*.

Numerous entities have formally recognized Tim's community and professional contributions, including the National Association of Attorneys General (*Marvin Award* for leadership and service, and co-recipient of the *Best Brief Award* for legal writing in the U.S. Supreme Court), LBJ School of Public Affairs (*alumnus of the year*), ASU School of Public Affairs (*Faculty Associate Award* for teaching excellence), the City of Phoenix (which dedicated the *Delaney Family Playground* in recognition of years of public service), and *NonProfit Times* (*Power & Influence Top 50* nonprofit leaders, six times)



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Day 1 Speakers – August 21, 2019

AM Breakout Sessions – 10:00-11:00am

Session Date: Aug 21 **Session Time:** Breakout AM - 10am-11:15am

Title: CEO/Board Chair Partnership: A Case Study in Engagement

Level: Intermediate

Speaker: Bruce Weber - President/CEO, Weber Group

Co-Presenter: Charlie Smith – Senior Partner, Weber Group, Katherine Cecala – President, Junior Achievement

Description: As a board chair, how does one build a solid partnership with the leadership of the organization and sustain it. In this session you will hear first hand from the CEO and board chair how they transitioned from a top down to a generative, communicative governance body.

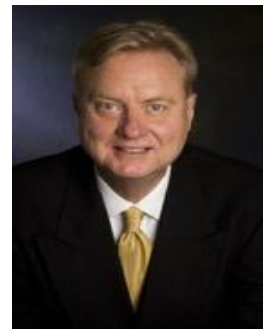
Learning Objectives:

- Building a respective communication style
- Developing candor and cooperation between the board and leadership
- Moving from a passive to a generative leadership style

Speaker Bio: Bruce Weber is Founder and President/CEO at Weber Group, an independent consulting firm that assists social-sector organizations in realizing their potential and achieve long-term sustainability through transformational execution. As a BoardSource Certified Governance Trainer, Bruce delivers cutting edge tools and methodologies to assist in building the right governing board to support the organization. Having served in many roles on nonprofit boards, Bruce is qualified to provide the guidance and tools necessary to make a successful impact on an organization. The Weber Group approach to planning and strategy provides focus in building organizational capacity leading to long term sustainability and mission attainment.

Speaker Bio: Charlie has a passion for helping nonprofit organizations design and execute strategy. He assists leadership teams in navigating transformational change. Charlie has spent over a decade in Europe and Asia leading change management initiatives with a Dow 30 organization and brings along valuable insights and lessons learned. He is an advocate for CEO's who expect greater board engagement and set high expectation of their boards. He is a BoardSource Certified Board Chair and Board Governance Consultant and 6 Sigma Master Black Belt. He serves on local boards including Arizona Helping Hands, Junior Achievement and the Scottsdale Boys and Girls Club Foundation. He is a Board Chair. Charlie earned a B.A. in Business Administration from Bellarmine College, Louisville and an MBA from Manchester Business School, Manchester UK. Charlie and Jen, his wife of 37 years, have five grandkids and live in Scottsdale.

Speaker Bio: Katherine Kemmeries Cecala is the President of Junior Achievement of Arizona, a nonprofit organization dedicated to preparing young people to succeed in work and life. Katherine has a diverse background in nonprofit leadership, healthcare administration, law, industrial engineering, utilities, and business. She also has



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Day 1 Speakers – August 21, 2019



extensive knowledge of our community and nonprofit landscape as she has served on over forty nonprofit boards. A master's level instructor of nonprofit leadership at Arizona State University, Katherine has a degree in industrial engineering from LSU, a Master's of Business Administration from Louisiana Tech and a law degree from the University of Arkansas.



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Day 1 Speakers – August 21, 2019

Session Date: Aug 21 **Session Time:** Breakout AM - 10am-11:15am

Title: How to Engineer Change Through Your Vision

Level: Beginner

Speaker: Catherine Alonzo - CEO and Co-Founding Partner, Javelina

Description: Donors, employees, and funders today want to invest their time, talents and treasure with nonprofits that are engineering systemic change while also servicing community need. It's not enough to respond to a problem; stakeholders are demanding organizations tackle the causes of the problem as well. So it makes sense that the nonprofits that are thriving in the face of rising competition for fiscal and human resources are those creating structural societal impact - and telling the story of how they're doing it. This isn't easy, but it is simple. It starts with identifying your organization's unique and authentic vision, made up by your purpose, mission, and values. Then, making all internal and external decisions through that lens. It includes your messaging, your programs and services, your policies and procedures and more. Your vision is not just a set of words that go on your website; but your organizational heart beat, thumb print or DNA. It is the thing that makes you who you are and determines how you serve your community - in good times and bad.



Learning Objectives: This workshop will show you the role each component of your vision plays in guiding your organization, how to audit where you're at, and where to start. The ability to articulate and live your vision will ensure you're keeping the right people engaged within and outside of your organization. Participants will also receive resources on how to develop and/or strengthen their purpose, mission, values.

Speaker Bio: Catherine Alonzo is the CEO and founding partner of Javelina, a company that brings brand experience to life for nonprofits, businesses, campaigns and individuals. Having played a pivotal role in growing Javelina into a leading branding and marketing firm, Catherine specializes in effective messaging, brand development and personal and business strategic planning. With a background in political campaigns, Catherine specializes in creative approaches to build brands that move the target audience. She was a part of the teams that elected Phoenix Mayor Greg Stanton, Tempe Mayor Mark Mitchell, as well as pass numerous local and school initiatives. In October 2016, Catherine was recognized as the prestigious Athena award winner in the Young Professional category by the Greater Phoenix Chamber of Commerce for her outstanding professional and community leadership. Dedicated to her community, Catherine has been an integral volunteer for many local organizations, including Equality Arizona, a statewide LGBTQ-rights advocacy organization, and Tucson-based nonprofit Ben's Bells. She led the Phoenix Steering Committee to open a Phoenix studio for the organization, which has been thriving on Roosevelt Row in downtown Phoenix since June 2015. Originally from the UK, Catherine moved to Arizona in 2005 to complete her Master's Degree in Public Administration at Arizona State University. She lives in central Phoenix with her husband Ruben and their three bunny rabbits.



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Day 1 Speakers – August 21, 2019



Session Date: Aug 21 **Session Time:** Breakout AM - 10am-11:15am

Title: On My Own: Running a Small NonProfit

Level: Beginner

Speaker: Karolyn Benger - Owner, KB Enterprise

Description: Not all nonprofits are multimillion dollar industries. Many are led by just a few, or only one person, yet have the impact of many. From changing the toner to making the big ask, find out how to single handedly-- and successfully-- run a small nonprofit. Learning your strengths and weaknesses, knowing what to outsource and what to keep in house, and understanding the latest technological resources versus the latest fads can help develop your organization and let you run with the big dogs (or medium size).



Learning Objectives:

- Understand the Importance of Relationship Building (Fundraising)
- Know Your Numbers!!! (Budgets)
- The Role of a Board-- Train Them Early (Board Management)

Speaker Bio: Karolyn Benger is the owner of KB Enterprise, a consulting firm in Phoenix, AZ. Previously, she was the founding Executive Director of the newly created Jewish Community Relations Council in Phoenix and served as the Executive Director of the Jewish Interest Free Loan of Atlanta. She is a graduate of Emory University with a degree in Political Science and a specialization in the Middle East where she studied Arab and Islamist opposition groups in Egypt. Ms. Benger has taught at Emory University, Georgia Tech, and Emerson College and is passionate about interfaith dialogue, race relations, and the peace and security of the Jewish community. She regularly speaks on Women in Orthodoxy, Women in Islam, Democratization in the Middle East, Social Movements, Anti-Semitism, and Islamist organizations. Her non-academic publications can be found with Kveller, North Shore Children and Families, Times of Israel, and Binah.



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Day 1 Speakers – August 21, 2019

Session Date: Aug 21 **Session Time:** Breakout AM - 10am-11:15am

Title: Audience Engagement: The Key to Creating and Building Your Social Channels

Level: Intermediate

Speaker: Suzanne Berrios - Director of Charities, Customer Experience, PetSmart Charities

Co-Presenter: Virginia Nelson, Content Producer, PetSmart Charities

Description: Long gone are the days where an organization should focus on the size of their social followers as the sole metric of success. Today with so many social channel options to choose from and ever-changing algorithms, it is more important than ever that engagement be one of the top KPIs. A little over two years ago the marketing team at PetSmart Charities (in partnership with our creative agency) set out to reestablish our Facebook, Instagram, Twitter, YouTube, and LinkedIn channels. Our goal was to drive engagement (initially undefined) across all of these channels and our first steps included defining audiences, creating strategies, developing content, establishing media spend, optimizing & testing, etc. During this session, we will share some of our key findings (and mistakes) we have learned over the last two years, reinforcing why engagement is now our primary metric.

Learning Objectives:

- Size of the audience is not as important as audience engagement - defining your KPIs
- One size does not fit all - creating channel specific content
- Identifying appropriate channels for your audience - leveraging your resources

Speaker Bio: After leading the National Promotions team as Director of Marketing at PetSmart, Suzi Berrios joined the PetSmart Charities team in 2017 as Director of Customer Experience. Her strong background in marketing includes over two decades of leading brand strategy, events, product development, CRM, direct response, advertising, promotions and production. Suzi now combines her passion for translating creative ideas into successful and profitable results with a mission that's near and dear to her heart - connecting people and pets. She and her husband Alan have a blended family of four children; Sydney, Chris, Brianna and Devin, and two fur-children, her rescue pups Blue and Motley.

Speaker Bio: As the Content Producer for PetSmart Charities, Virginia Nelson leads the storytelling efforts across the organizations social and digital platforms. Equipped with a strong journalism background, Virginia brings over a decade of combined experience in digital content marketing, video production, web content development, and copywriting for both digital and print. When she's not writing about or smothering her animal friends, she's busy tending to her very own pack of rescued pups, Ty, Sampson and Bosco with help from her husband Brock.



Day 1 Speakers – August 21, 2019

Session Date: Aug 21 **Session Time:** Breakout AM - 10am-11:15am

Title: Leveraging Neuroscience to Make Feedback Work, Shift Culture, and Feel Better

Level: Intermediate

Speaker: Sarah Griffiths – CEO, The Next Chapter Consulting and Coaching

Description: Research shows that using feedback is how organisms and organizations stay alive. In this high-engagement workshop, participants will explore and discuss how leaders can make the most of this anxiety-producing process, using it as a catalyst for personal growth, organizational change and a way of tilting toward a culture of continuous improvement.



Learning Objectives:

- Share research on the neuroscience of feedback: why does it feel like a root canal?
- Explore ways of leveraging feedback for individual and organizational growth
- Learn how leaders can use feedback to tilt their culture toward continuous improvement
- Discuss strategies for implementing what you've learned
- Have fun

Speaker Bio: Sarah's work is grounded in a desire to build just, resilient and healthy communities. Using strengths-based facilitation and individual coaching, Sarah supports the growth that allows us to share power, and build life-affirming leadership. She works with individuals, executives and organizations to support them in bridging the gap between where they are and where they want to be. Originally from Manchester, England, Sarah has lived in the USA since 1996. During this time, she has completed an MFA, been a teacher, a public education advocate, a foundation professional, and has spent over 20 years consulting and coaching. She moved to Tucson in 2003.

Day 1 Speakers – August 21, 2019



Session Date: Aug 21 **Session Time:** Breakout AM - 10am-11:15am

Title: LGBT Workplace Inclusion

Level: Beginner

Speaker: Wallace Hudson - Program Specialist, one-n-ten

Description: In this workshop, we will review basic LGBT definitions and statistics, followed by an overview of best practices for making your organization a safe space for LGBT folks. You will leave this training with tangible action items that you can bring to your workplace to ensure LGBT inclusion with your coworkers, staff, and/or clients.



Learning Objectives:

- Define the LGBT acronym
- Define sexuality, gender identity, and gender expression
- Create an action item on how to make workplaces safe places for LGBT folks

Speaker Bio: Wallace Hudson has been leading workshops and trainings on LGBT topics since 2016. Wallace received a master's degree in Women and Gender studies from Arizona State University in 2017, and in 2018 he became the Training Program Specialist for one-n-ten. In this role, he develops, leads, and oversees the LGBT competency trainings one-n-ten provides for various organizations.



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Day 1 Speakers – August 21, 2019

Session Date: Aug 21 **Session Time:** Breakout AM - 10am-11:15am

Title: Understanding Indirect Cost and the Impact on Grants

Level: Beginner

Speaker: Nicolie Lettini - VP of Indirect Cost Services, eCivis, Inc.



Description: The Uniform Grants Guidance is in full effect. Knowing and understanding your true cost has never been so important. What is the difference of indirect cost and direct cost? How do you calculate your indirect cost to assure your maximum reimbursement? Does it really matter now with the 10% de-minimis? We will provide answers and insight to these frequently asked questions. During this session, we'll discuss and work through a case study on Indirect Costs, the different methods of calculating it, what it means as it relates to grants and how it can affect the sustainability of your organization and the impact you can achieve. We will also discuss how with the Uniform Grant Guidance, knowing your true cost can affect your risk assessment in a positive way. Cost Allocation plans and Indirect Cost Rate Proposals have been around for almost 50 years. But today they are used for so much more than reimbursement for federal programs. They provide you with insight to your organization on what it REALLY cost to do business in today's local government and non profit industry. We'll also discuss the evolution over the years of calculating indirect cost, how they have used their cost plan for so many more things OTHER THAN compliance, and how it has changed how we looks at things. It's time to change the perception on Cost Allocation plans and indirect cost and see how they can change your organization for the better and move you towards sustainability and true Impact.

Learning Objectives:

Understanding Indirect Cost and the impact on Grants At the end of this presentation the participants will have a basic knowledge of the following:

- Understand the difference between Indirect and Direct Cost
- The value of calculating your indirect cost
- The uses of a cost plan in your agencies
- How True Cost impacts a grant: Understanding that direct cost can not happen without indirect cost and indirect cost don't exist without the need to support the direct people and projects.
- How indirect cost can be used as matching.

Speaker Bio: Nicky Lettini, MBA, VP of Indirect Services, eCivis, Inc. & Founder of CostTree, LLC With almost two decades of experience in the cost allocation world, and after preparing over 700 complete cost plans (helping clients recover over \$1 Billion in missed reimbursements), Nicky knows what it takes to build, manage and maintain effective cost allocation strategies. That's what led her to found CostTree, LLC - the premier cloud-based cost allocation platform for governments, nonprofits and private organizations. Now CostTree is a part of eCivis and Nicky has joined the team at eCivis to bring grants management and indirect cost together for the True Cost look at grants. Whether it's building cost allocation plans or preparing indirect cost rate proposals, Nicky uses Allocate, which she built from the ground up, to fit each organization's structure and needs. Her in-depth experience working across the country with state, local governments and nonprofits allows her to provide a level of service that is second to none. In addition to Nicky's commitment to her clients, she is also committed to staying abreast of local government rules and regulations including the Office of Management and Budget 2 CFR part 200 (formally OMB A-87) Regulations and has received formal training endorsed by the State of California. Moreover, she regularly provides significant educational and pro-bono services to higher education institutions, local government agencies and nonprofits around the country, including training on CostTree's platform and best practices in cost allocation.



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Day 1 Speakers – August 21, 2019

Session Date: Aug 21 **Session Time:** Breakout AM - 10am-11:15am

Title: Strengthening Organizations Through the Strategic Engagement of Women Donors

Level: Intermediate

Speaker: Michele Rebeor - Nonprofit Consultant, Michele Rebeor Consulting, LLC and Executive Director, Arizona, CCS Fundraising



Description: Despite overwhelming evidence of women's growing presence in philanthropy, few organizations are actively working to cultivate female donors. Nonprofits that fail to do so are losing out on significant potential revenue. Women today are not only making, inheriting and managing more money than ever before - they are also demonstrating their power and influence in using it. Engagement strategies that recognize the rising impact of women in philanthropy is key to attracting new donors, building longer-term relationships and ultimately increasing contributions. This workshop will offer attendees an opportunity to not only understand the female focused philanthropy related research but learn how and why they should include it in their organizations' development strategies. From recognizing the unique differences in the way women participate in philanthropy, to purposeful integration into development practices, as well as efficient and effective engagement opportunities, this workshop will present realistic methods for any size nonprofit to capitalize on the increasing power of women as donors.

Learning Objectives:

Goals for this workshop will be that attendees will walk away with:

- Insight and information on the emerging niche of women's philanthropy for nonprofits of all sizes
- A greater understanding of women as a powerful donor source for change in the future
- Research and statistics related to women and their philanthropic giving and how to use this data to assess their own development goals
- How to recognize and support the nuances and methods of female donors as well as integrate these differences into strategies that will offer greater appeal and engagement of women, now and in the future.
- Realistic methods to capitalize on the increasing power of women in philanthropy that do not necessarily require an increase in staffing or budgets.

Speaker Bio: Michele Rebeor is the Arizona-based Consultant/Executive Director for CCS Fundraising and owner of Michele M Rebeor Consulting, LLC. As a seasoned philanthropic and community-engagement professional, Michele has served Arizona's nonprofit and fundraising industry for nearly 30 years. She has directed a variety of successful community engagement, employee giving and philanthropic programs in healthcare, higher education and community organizations, bringing them to new heights of participation and contributions. Michele helps create effective and efficient strategies to cultivate and build meaningful relationships with donors, offering a unique hands-on experience in the powerful, burgeoning world of women and philanthropy, where she has applied and practiced the research for more than a decade. Before becoming a consultant, she spent 10 years as AVP for ASU Foundation's Women & Philanthropy. A young program with few precedents when she started, Michele created innovative and strategic opportunities for affluent, influential and dynamic women that inspired a 33% growth in donors and a 206% increase in Women & Philanthropy investors' overall contributions to ASU. Further enhancing her ability to support the nonprofit sector, Michele joined, CCS Fundraising in July 2018 as their Arizona based executive director. CCS is a leading international fundraising consulting and management firm with more than 70 years of turning insights into actions, challenges into opportunities, and fundraising goals into mission impact for clients in all sectors. The additional expertise and resources available through CCS offer nonprofit organizations across the state of Arizona greater access to a wide array of customized development related services.



Register at AZNonprofitConference.org

Day 1 Speakers – August 21, 2019



Session Date: Aug 21 **Session Time:** Breakout AM - 10am-11:15am

Title: Building a Diverse & Inclusive Board

Level: Beginner

Speaker: David Martinez III – Director, Capacity Building & Community Engagement, Vitalyst Health Foundation

Co-Presenters: Angela Hughey – President, ONE Community, Adam Lopez Falk – Leadership Programs Manager, Valle del Sol (Hispanic Leadership Institute), Jason Wong – Board Chair, Asian & Corporate Entrepreneur Leaders (ACEL)

Description: Diversity matters in the boardroom. Listen and engage with vital voices in building a diverse and inclusive board where you'll learn practical strategies for diversifying your board and why it's important to lead with intent to ensure your nonprofit is not "cut off" from the public you serve and the needs of communities.

Learning Objectives:

- Practical strategies to diversify your board
- Learn importance of leading with intent
- Formulate your own plan

Speaker Bio: David Martinez III serves as Director of Capacity Building and Community Engagement, working with community-based leaders, organizations, and coalitions to increase capacity and civic participation. Prior to Vitalyst, Martinez was project manager for the Center for the Future of Arizona, and community engagement manager for St. Mary's Food Bank Alliance. He is a Flinn-Brown Fellow with the Arizona Center for Civic Leadership, and involved with the Arizona Community Foundation's Center for LGBTQ Philanthropy and the Desert Botanical Garden. Originally from Marana, Arizona and one of six children, David is a first generation college student earning a B.A. in Secondary Education, Political Science and Journalism from The University of Arizona. He served as Student Regent on the Arizona Board of Regents, worked at the UA Office of Institutional Equity, and interned with Congressman Raul Grijalva. Martinez currently lives in Central Phoenix and as a localist, loves to explore Arizona.



Register at AZNonprofitConference.org

Day 1 Speakers – August 21, 2019

Luncheon Keynote – 12:15-12:45pm

Title: Building A Bright Future Together

Speaker: Sybil Francis, Ph.D. – CEO & President, Center for the Future of Arizona

Description: *The Arizona We Want* is a shared vision of success around what matters most to Arizonans that expresses their highest aspirations and hopes for the future. The Center for the Future of Arizona is committed to advancing the priorities of Arizonans as expressed in *The Arizona We Want* and measured by the Arizona Progress Meters. These priorities form a holistic agenda of the collective ambitions of Arizonans that state, community and organizational leaders can use to build a bright future together.

Speaker Bio: Dr. Sybil Francis is a founding member, President & CEO of the Center for the Future of Arizona (CFA), a nonprofit, nonpartisan organization that brings Arizonans together to build a bright future for the state. For more than three decades, Francis has been a dedicated public policy architect who is committed to advancing innovative solutions to societal imperatives.



About Center for the Future of Arizona: The Center for the Future of Arizona (CFA) brings Arizonans together to build a bright future for our state. CFA remains committed to advancing the priorities of Arizonans as expressed in *The Arizona We Want* and measured by the [Arizona Progress Meters](#). These eight priority areas include: Jobs, Education, Young Talent, Health and Well-being, Natural Resources, Infrastructure, Civic Participation and Connected Communities.

arizonafuture.org

CFA: Major Accomplishments

- Created ***The Arizona We Want***, derived from the first of its kind Gallup Arizona Poll that captured the views and priorities of Arizonans.
- Launched the **Arizona Progress Meters**, a portfolio of evolving, dynamic tools to measure the priorities that Arizonans identified as critically important to the future of the state. Progress Meters include trusted public data sources to inform long-term decision making and help advance Arizona in the areas that are most important to its communities.
- Started **Community Conversations** across Arizona to empower communities with data and new tools to advance their priorities and goals.
- Fostered civic engagement for Arizona youth by equipping Youth Councils to tackle community challenges, and engaged thousands of students to 'learn democracy by doing' through **Participatory Budgeting**.
- Impacted more than 200,000 students, 5,200 teachers and hundreds of school leaders in Arizona through leadership development and innovative approaches to preparing students for college and the workforce.

CENTER FOR THE
FUTURE OF ARIZONA



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Day 1 Speakers – August 21, 2019

Deep Dive Sessions – 1:00-3:45pm

Session Date: Aug 21 **Session Time:** Deep Dive – 1:00-3:45pm

Title: Sunshine On a Cloudy Day: Preventing, Planning For, and Mastering Crisis Communications Events

Level: Intermediate

Speaker: Paul Allvin – President, Cloud-2-Ground



Description: The old man explained why he never fixed his leaky roof: "When it's dripping on me, it's too rainy to fix it. And when it's sunny outside, it's as good as any man's roof." This fool-hearted approach is no way to manage a crisis event. Crises occur to even the greatest of organizations. How they are managed and communicated to the public and to organizations' core supporters determines whether key relationships between donors, volunteers and program beneficiaries are strengthened, or ruined. In this session, attendees will gain a better understanding of how to assess crisis risks, how to plan for them, and how to successfully navigate one when a crisis event is in full blossom. A well planned and executed crisis plan not only prevents longterm harm to a brand -- in fact, it strengthens it. In this session, participants will learn the critical elements of crisis management and communications, and will walk through a sometimes-harrowing, sometimes-entertaining crisis scenario in a tabletop exercise that will take them into the heart of a crisis even that could happen to any nonprofit organization.

Learning Objectives:

- How to assess threats your organization should be prepared for (internal and external).
- How to build a crisis response plan that will serve you well in the heat of a crisis.
- Understanding how crises unfold and should effectively be managed, through a "live-fire exercise."
- Enhanced confidence to lead calmly, confidently, and ethically in the heat of crisis events.

Speaker Bio: Based in Falls Church, Virginia, Arizona native Paul Allvin has 30 years of experience in reputation management, brand stewardship, communications, marketing, and journalism. Paul has served as the senior executive in brand advancement for such organizations as Make-A-Wish America, the USO, and America's Promise Alliance. In addition, he served as communications chief for The University of Arizona and the office of former Arizona Gov. Janet Napolitano.



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Day 1 Speakers – August 21, 2019



Session Date: Aug 21 **Session Time:** Deep Dive – 1:00-3:45pm

Title: The Arizona We Want Community Conversation

Level: Intermediate

Speaker: Kristi Tate - Director, Civic Health, Center for the Future of Arizona



Description: Through the Arizona We Want Community Conversations, the Center for the Future of Arizona is engaging with many different communities across the state to spark dialogue about the aspirations Arizonans hold for the future of our state, introduce the Arizona Progress Meters as tools to support data-driven dialogue & planning, and evolve our understanding of the issues that matter most to Arizonans at the local level. The nonprofit sector plays a critical role in advancing the issues that matter most to Arizonans, and we need your feedback and input in this statewide conversation.

Learning Objectives:

- Engage communities in dialogue around our identity as Arizonans and the aspirations we all hold for the future of our state.
- Elevate local concerns to statewide visibility by gaining an understanding of the priorities that exist in communities across Arizona & spotlighting pressing issues.
- Frame conversations, drive action, and measure progress by introducing a set of fact-based tools with vetted and reliable data that can help.
- Evolve and refine the Arizona We Want Progress Meters by incorporating feedback and input from communities.

Speaker Bio: Kristi Tate leads Civic Health Initiatives for the Center for the Future of Arizona. She has served in leadership roles spanning organizations focused on education, service, and civic engagement. Most recently, Kristi served with the National Conference on Citizenship (NCoC), a congressionally chartered organization dedicated to strengthening civic life in America, leading partnerships designed to strengthen civic life in communities across the country. Before joining NCoC, she served at Georgetown University's Center for Social Justice as Director of the DC Schools Project. She has also directed programs for HandsOn Greater Phoenix and the Boys and Girls Club of Boston Charlestown Clubhouse. She has a B.A. from the University of Notre Dame and Master of Arts in Liberal Studies degree from Georgetown University, with a focus on social and public policy.



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Day 1 Speakers – August 21, 2019



PM1 Breakout Sessions – 1:00-2:15pm

We are pleased to bring you this session in partnership with:



Session Date: Aug 21 **Session Time:** Breakout PM1 – 1:00-2:15pm

Title: Executive Roundtable Discussion: Topic - OVERHEAD

Level: Beginner

Speaker: Facilitated by Geri Wright – President & CEO, Act One Foundation

Description: TBA

Learning Objectives: TBA



Speaker Bio: Geri Wright has 25-plus years of experience in nonprofit leadership roles. She took over as Executive Director of Act One in May 2015, where she was charged with growing the young, dynamic nonprofit that provides access to the arts for those in our community who would not otherwise be able to experience a live artistic performance or visit a museum. Now seven years old, Act One has brought more than 175,000 students from Title 1 schools on arts field trips and makes available 500,000 free passes annually to Arizona residents for cultural and artistic organizations through the Act One Culture Pass.

Since 2015, Geri has successfully established an organizational structure that has supported strategic growth by strengthening the governance, board and committee functions; establishing a fundraising program that has supported doubling the organization budget in three years and is sustainable; expanding the field trip program to serve 45% more students annually; expanding the Culture Pass program to Tucson and adding additional Phoenix area libraries and venues; reinforcing the Act One's infrastructure by tripling staff, enhancing technology, engaging volunteers and identifying an earned revenue source.

Geri's career has included senior leadership positions at nonprofit organizations including Arizona Theatre Company, the American Red Cross of Greater Phoenix and the Heard Museum. Prior to joining Act One, Geri was Director of Development at Arizona Theatre Company, where she oversaw individual, corporate and foundation giving as well as the company's gala fundraising event, "Curtain Up." Prior to joining ATC, Geri served as Regional Chief Development Officer for the American Red Cross, overseeing fundraising efforts, corporate and foundation partnerships and individual giving programs for most of Arizona. During her tenure at the Red Cross, she started the region's first Tiffany Circle of philanthropic women and led the team that established a partnership resulting in the largest unrestricted corporate gift ever received by the American Red Cross. She joined the Red Cross in May 2010 following 12 years at the Heard Museum in Phoenix, where she served as Director of Development. At the Heard Museum, she led numerous fundraising campaigns including the \$7.8 million campaign to build the museum's signature exhibition "Home: Native People in the Southwest."



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Day 1 Speakers – August 21, 2019



Geri currently serves on the board of ONE and is a graduate of Valley Leadership Class 34 and the American Express Nonprofit Leadership Academy. In 2013, she was honored as the Outstanding Fundraising Executive from the Association of Fundraising Professionals, Greater Arizona Chapter, 2019 Out-standing Women in Business by the Phoenix Business Journal and received the Organizational Accomplishment and Innovation Award from the Organization of Nonprofit Executives in 2019. Geri and her family, along with two horses and an Australian cattle dog, reside at the base of the McDowell Mountains in North Scottsdale.



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Day 1 Speakers – August 21, 2019

Session Date: Aug 21 **Session Time:** Breakout PM1 – 1:00-2:15pm

Title: A Cafe with a Cause: A Sustainable Mission Forward Model

Level: Advanced

Speaker: MaryEllen Clausen - Founder/CEO, Ophelia's Place

Description: According to The National Center for Charitable Statistics there are 1.5 million nonprofits in the United States. In 2010 nonprofits accounted for 9.2% of all wages and salaries paid in the US. In 2013 public charities reported over \$1.74 trillion in revenues and \$1.6 trillion in expenses. It is serious business that often begins with an unrelenting passion to do something, anything. Ophelia's Place started with a desire to do something; our mission is to provide support, access to treatment, and education that raises awareness and reduces shame and stigma, for anyone impacted by eating disorders, disordered eating and body image. One of the greatest challenges we faced was how to grow and sustain the nonprofit while creating social change. In 2013, 21% of funding for nonprofits came from contributions, gifts and grants. 7% came from other sources including dues, rental income and gains or losses from goods sold. 72% came from program service revenues. Why does this matter? What happens if the nonprofit does not charge a fee for service or they have lost key contributors? Often times organizations do not have the capacity to meet their financial needs while fulfilling their mission. This workshop will address how nonprofits can fulfill their financial needs and build capacity by creating a sustainable revenue that is mission centric.



Learning Objectives:

- An explanation of the mission-specific sustainable Ophelia's Place/407 Model.
- A clear understanding of what is meant by ecomission specific and how it relates to Ophelia's Place and other nonprofits represented in the workshop.
- A clear understanding of what is meant by ecosustainability, how it relates to Ophelia's Place and the nonprofits represented in the workshop.

Speaker Bio: MaryEllen Clausen is widely recognized as an innovative leader in eating disorder prevention, education, and advocacy. After her two daughters struggled with eating disorders and her family learned of the severe lack of local eating disorder resources, Mary Ellen envisioned a center that could offer support, encouragement, and hope to those impacted by eating disorders. Her vision became Ophelia's Place, a nonprofit that was founded in 2002 to offer a safe haven for those who suffered from eating disorders and the family members who supported them. Ophelia's Place offers information about eating disorder prevention, intervention, treatment, and education. In 2009 MaryEllen opened Cafe at 407 to serve three main purposes: to help eliminate the shame and stigma of mental illnesses by inviting the community to be a part of the healing process, to provide a low-barrier entry point for those curious about treatment, and to provide sustainable funding for the nonprofit. In 2017 Ophelia's Place expanded to Arizona with an office located in Gilbert. Her daughter Holli now serves as Executive Director of the organization, with MaryEllen serving as the CEO.



Day 1 Speakers – August 21, 2019



Session Date: Aug 21 **Session Time:** Breakout PM1 – 1:00-2:15pm

Title: Financial Leadership for Nonprofit Organizations

Level: Beginner

Speaker: Harriet “Hatsy” Cutshall - Senior Manager, Your Part-Time Controller, LLC

Description: We will build on a basic understanding of accounting and financial terms to learn to use the financial reports for budgeting and strategic planning. We will review some basic analytical tools and benchmarking to help nonprofit leaders learn to use their own internal financial reports to measure operational effectiveness and efficiency.



Learning Objectives:

- Discuss key pieces of financial information that (should) matter most to nonprofit leaders and how to use them for strategic decision making
- Learn how the new nonprofit reporting standards make it easier for readers to understand the information
- Share tips on ratio analysis and benchmarking.

Speaker Bio: Harriet S. “Hatsy” Cutshall, CPA, earned a BS in Biology and later a certificate in Accounting. Her professional nonprofit experience includes serving as Director of Finance and Administration for the Rural Community Assistance Partnership, and as CFO for the American Society of Appraisers and for America Abroad Media. It was her work in these positions that honed her strong accounting, management, budgeting and communication skills. In her current position as a Senior Manager with Your Part-Time Controller LLC, she supports the work of her colleagues and their clients as an advisor as well as a hands-on practitioner, when needed. She is involved in all aspects of practice development and recruiting, and provides a full range of accounting, reporting and management services to nonprofit clients herself. Hatsy is excited to be helping to open YPTC’s newest office in Phoenix.



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Day 1 Speakers – August 21, 2019



We are pleased to bring you this session in partnership with:



Session Date: Aug 21 **Session Time:** Breakout PM1 – 1:00-2:15pm

Title: Working Board Warriors

Level: Intermediate

Speaker: Julie Euber - Vice President, Young Nonprofit Professionals Network Phoenix



Description: Working boards are occupied by individuals who go above and beyond to invest in the mission, vision, and direction of the organizations they care about. However, working boards also face obstacles singularly unique to their governance structure. Join us as we discuss the challenges of a working board and how to build the resources and strategies you need to use the working board model to your advantage while engaging board members in the most effective manner. For over 11 years, the Young Nonprofit Professionals Network (YNPN) Phoenix has been operated by a dedicated working board. Through the ups and downs of an ever-changing board, YNPN Phoenix has developed methods for succession planning and supporting the sustainability of the organization. Throughout the discussion of key factors for maintaining a successful working board, we will share actionable strategies and relevant documents participants can use within their own organizations. We will also facilitate an open discussion of the strategies and approaches that have benefited other working board members attending the workshop. This session will be most helpful to anyone who runs or sits on a working board.

Learning Objectives:

Speaker Bio: Julie Euber serves as Vice President of the Young Nonprofit Professionals Network (YNPN) Phoenix and works with the board to support a network of diverse thought leaders dedicated to creating a thriving, resilient, and inclusive social sector in Phoenix. Julie also serves as TGen's Manager of Education and Outreach. In this role, she is responsible for oversight of all education and outreach initiatives at TGen that increase the community's working knowledge of genomics and educate, train and inspire the next generation of researchers and physicians. She seeks and establishes productive partnerships with local academic institutions and businesses and initiates innovative programs and joint ventures, including the institute's flagship internship program Helios Scholars at TGen, new high school program TGen Bioscience Leadership Academy, academic year internships, public tours, and events supporting the STEM education community. She holds a BA in Anthropology and English with a minor in biology from Indiana University and earned her MA in Anthropology from Arizona State University. Julie is an alumna of City Year New York and the American Express Leadership Academy at the ASU Lodestar Center for Philanthropy and Nonprofit Innovation.



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Day 1 Speakers – August 21, 2019

Session Date: Aug 21 **Session Time:** Breakout PM1 – 1:00-2:15pm

Title: Are Founders Hiding in Your Organization?

Level: Intermediate/Advanced

Speaker: Patrick McWhortor – CEO, The Cosanti Foundation

Co-Presenter: Stephanie Small, Synergy Partners Consulting
& Pam Gaber, Gabriel's Angels



Description:

You may not be, or your organization may not currently have a founder, but can you find the legacy of the founder still lingering in your organization? How would you know? Experienced nonprofit founders and executives Pam Gaber, Stephanie Small and Patrick McWhortor will share their insights and offer field-tested advice about preventing or overcoming what's commonly called "founder's syndrome." Engaging the community in the impact of your organization means going beyond the vision and ideas of one person and building connections and partnerships which help your organization grow and thrive. Some founders accomplish that, but others build the organization primarily around their personal unique talents. Gaber, Small and McWhortor will offer tips for engaging the community, building the organization's infrastructure and avoiding the "cult" that can sometimes surround a visionary leader. And your organization, perhaps outlasting the founder long ago, may still carry that legacy. Nearly 20 years ago, Gaber founded Gabriel's Angels, which provides pet therapy services. Small was the founder and led Free Arts for of Arizona for 14 years and is now Chief Synergist of Synergy Partners Consulting. McWhortor has been involved in founding multiple nonprofits for the past 20 years and is the current President & CEO of Cosanti Foundation, which carries on the legacy of its deceased founder. Hear these veterans share their stories and advice from the founders' front lines.

Learning Objectives:

- Understand how founders can both help organizations thrive and sometimes hold them back.
- Identify practices and characteristics in your organization that suggest a founder legacy is present.
- Summarize key steps for founders to take that ensure an organization is embedded in the community, meets ongoing needs and sustains its impact.
- Create a framework for sustainability which is not dependent upon one leader.

Speaker Bio: Patrick McWhortor is the President & CEO of Cosanti Foundation, with a vision of forming equitable and sustainable relationships between human activities and the Earth's ecology. Cosanti operates Arcosanti, the unique urban laboratory located 60 miles north of Phoenix, via Exit 263 on I-17 (Arcosanti Road). A long-time change agent, Patrick has formed and led nonprofits such as the Alliance of Arizona Nonprofits and NPower Arizona, and provided advocacy, strategy and leadership consulting to a wide variety of nonprofits. Patrick has served on numerous nonprofit boards of directors. He is past Chair of the Board of Directors of the National Council of Nonprofits and currently serves on the boards of Herberger Theater and the Arizona Advocacy Network. Patrick also teaches nonprofit, public policy and political science courses at Arizona State University. He is an inaugural Flinn-Brown Civic Leadership Academy Fellow and a 2004 graduate of Valley Leadership. He earned both his bachelor's degree in political science and master's degree in public policy from Arizona State University. Patrick has three grown children and lives with his wife in Cave Creek.



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Day 1 Speakers – August 21, 2019



Speaker Bio: In 2000, Pam Gaber founded Gabriel's Angels, a 501(c)(3) nonprofit organization. She recognized the pressing and documented need in the community to enhance the lives of neglected and abused children through the application of pet therapy. The organization was named after Pam's Weimaraner, Gabriel, who began his career by visiting the children residing at the Crisis Nursery in Phoenix. During these visits Gabriel offered unconditional, non-judgmental love, teaching the children empathy, compassion and respect. By watching Gabriel help the children to trust again, Pam understood that something special was happening and felt compelled to reach more children. The triumph of Gabriel's Angels is manifested by Pam's leadership position as CEO and her daily involvement in the development, growth and vision of the organization. Presently there are 180 Pet Therapy Teams serving over 123 agencies and reaching 15,200 AZ children annually. Her achievements include winning the *Hon Kachina Volunteer Award*, *Women in Business* by the Phoenix Business Journal and a *YWCA Woman of Excellence*. She was among the *Amazing Awards*, *Amazing Women* winners honored by National Bank of Arizona and the Phoenix Suns. BMO Harris honored Pam in 2018 in the category of *Women Who Serve*. In 2019 Pam was awarded the *Martha Rothman Lifetime Achievement Award* by Children and Family Resources.



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Day 1 Speakers – August 21, 2019



Session Date: Aug 21 **Session Time:** Breakout PM1 – 1:00-2:15pm

Title: Fundraising: Whose Job Is It, Anyway?

Level: Intermediate

Speaker: Cheryl House – Consultant, The Phoenix Philanthropy Group

Description: A successful fundraising program is built on mutually beneficial, long-term relationships and engages everyone in your organization to some degree. How do you build a culture of philanthropy so that everyone on your team - from front line staff to board members - understands and values their role in the process? Experts from The Phoenix Philanthropy Group will share a framework for building a culture of philanthropy in your organization, and tools that can be used to help every member of your organization clarify their role. Participants will learn how to articulate a case for giving that reflects their personal style and position within the organization, and will walk away with a renewed sense of their role as an ambassador for your mission.



Learning Objectives:

- Understand what constitutes a culture of philanthropy.
- Articulate the roles of staff, board and volunteers in relationship building.
- Create a personalized case for giving that fits your role in the organization.

Speaker Bio: Prior to joining Phoenix Philanthropy, Cheryl served as Interim Associate Vice President and Chief Development Officer at the University of Arizona Health Sciences Center. Preceding this, she was Senior Director of Development at UAHS, where she was responsible for facilitating development activities with College and University leadership, overseeing a team of development officers, and managing a portfolio of major and principal gift prospects. Prior to this, Cheryl was Assistant Vice Chancellor and Executive Director for the Pima Community College Foundation and was a member of the College's leadership team; and Director of Development for the University of Arizona College of Pharmacy through the University of Arizona Foundation. She began her work in the nonprofit sector as Vice President for Development and then President of Junior Achievement of Southern Arizona. In 2001, the Association of Fundraising Professionals named Cheryl Southern Arizona's Outstanding Fundraising Executive and she is a 2006 alumna of Greater Tucson Leadership. Volunteer Highlights (past & present): CASE (Council for Advancement and Support of Education) District VII, CASE Commission on Philanthropy; Association of Fundraising Professionals; Planned Giving Roundtable of Southern Arizona; Social Venture Partners Tucson; Board of Directors of the YWCA of Southern Arizona; and Women's Foundation of Southern Arizona.



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Day 1 Speakers – August 21, 2019



Session Date: Aug 21 **Session Time:** Breakout PM1 – 1:00-2:15pm

Title: Design Thinking and Social Innovation

Level: Beginner

Speaker: Scott Morrissey - Vice President, Strategy, Valley of the Sun United Way



Description: This workshop will provide an overview of human centered design principles and the design thinking process. Design thinking involves engagement across disciplines and functional areas, as well as drawing in external stakeholders and people with lived experience to co-create solutions, programs, and services. Valley of the Sun United Way is using design thinking to inform our work in the community, as well as to strengthen and enhance our organizational culture. The typical design process involves building empathy, defining the problem you want to solve, ideating and brainstorming new ideas, prototyping solutions, and testing in market. We will review the design process, the innovation model at VSUW, and examples of designing for social innovation.

Learning Objectives:

- Inform audience about human-centered design principles and practices
- Share VSUW innovation model as a possible framework to follow
- Share examples of how human-centered design can be used for social innovation

Speaker Bio: Scott's responsibilities in the strategy office at VSUW include strengthening the collaboration between Community Impact, Resource Development, and Engagement by leading the enhancement of our current programmatic work and the development of new products. The current VSUW product catalog includes 120 investment and engagement opportunities for donors. Scott manages the portfolio of VSUW's human-centered design projects and directs a team of design coaches to execute both internal and external initiatives for continuous improvement and breakthrough innovation. He leads the Design Business Canvas Team and the Design Team, serves as lead facilitator on key initiatives, and teaches design thinking principles to new and existing employees. Prior to joining VSUW, Scott spent over 20 years in product design, product development, and product management for consumer products and services companies such as American Greetings and the American Automobile Association. He has experience in product consulting, market research, and concept development for Fortune 500 companies. He has worked in both the private and the nonprofit sectors across multiple industries, and brings a broad perspective to develop solutions to complex problems.



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Day 1 Speakers – August 21, 2019

PM2 Breakout Sessions – 2:30-3:45pm

Session Date: Aug 21 **Session Time:** Breakout PM2 – 2:30-3:45pm

Title: The 3 L's Learn-Love-Lead

Level: Intermediate

Speaker: Kimberly Hall - Director of Development, Circle the City

Description: Leadership is difficult. As people leaders we are privileged with the opportunity to lead and obligated to lead people well and steward relationships. Learn, Love, Lead will focus on the "how" through stories and practical opportunities we have everyday to ensure our relationships are stewarded well. Join us for this open dialogue in a fun and encouraging environment.



Learning Objectives:

- Learn- learn the people who work for and alongside you. Understand what they like, dislike, get to know them as a person not only as a producer of work/product/service.
- Love- We all want to be appreciated, loved and cared for. Show up for your team members when they need you. It might be a milestone birthday, graduation or even a funeral. If it's important to them it should be important to us (within reason of course).
- Lead- after you have learned the team, you've shown them that you care (Love), now you have earned the right to lead them. When someone genuinely likes you and believes you have their best interest at heart they will follow you and be loyal to the organization because you see them. Not just their production but you see them as a person and you've acknowledged their value.

Speaker Bio: Kimberly Hall currently serves as Director of Development for Circle the City, and has been a leader within the organization since March 2018. Ms. Hall has worked with another nonprofit for nearly a decade in multiple capacities, and most recently as Director of Development for Goodwill of Central and Northern Arizona, one of the most well-known nonprofits in the country. In her role at Goodwill she oversaw all Philanthropic efforts and prior to that, regional responsibility for expanding to 22 career center locations and staff, creating a community engagement team, business development team, re-establishing a training team and functioned as spokesperson on television and radio for Goodwill. With experience in building and streamlining processes Goodwill went from serving 35,000 jobseekers to over 90,000 in 4 years, while reducing cost to serve by 66%. Ms. Hall holds a Bachelors in Human Service Management from University of Phoenix and will complete a Masters in Leadership by July 2019 from Grand Canyon University. She currently serves on many boards and committees to include Valley Leadership as board director, Big Brothers Big Sisters as a mentor to a low income mentee with a physical disability, Achieving My Purpose as board director, and Women United Steering Committee via United Way. Kimberly has also volunteered for the last two decades doing homeless outreach with several organizations in support of eradicating homelessness in the Phoenix Metropolitan area.



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Day 1 Speakers – August 21, 2019

Session Date: Aug 21 **Session Time:** Breakout PM2 – 2:30-3:45pm

Title: Is It Time to Swipe Right? How and When to Consider a Collaboration with Another Nonprofit

Level: Intermediate

Speaker: Nora Hannah – Director, Az Together for Impact Fund

Description: National data indicate most nonprofits have only three to four months of operating reserves, yet these organizations are tackling some of the hardest problems and serving the most vulnerable populations in our communities. The sector often receives “cost-minus” funding from government and restricted grants, faces structural challenges in recruiting and retaining high-quality back-office staff, and operates in a dynamic environment of technological, demographic and political change. In light of these challenges, and the fragile financial condition of many organizations, it is vital that nonprofit leaders understand they can achieve more working with and through other organizations to create more impact, program continuity, and financial stability. One powerful strategy that is too often overlooked is to form a long-term, durable partnership through a strategic alliance or restructuring. Strategic partnerships can open whole new worlds of opportunity for serving your mission. They can broaden your reach, expand the range and scale of your programs, and help you find more efficient ways to operate. It’s time for nonprofit leaders (board members and executives alike) to think big about the powerful opportunity collaboration offers. In this workshop we show you how to take the next step by providing you discussion guides, best practices and case studies on collaboration that can be integrated into your planning model. We will also describe the Arizona Together for Impact Fund and how to access this opportunity for support.



Learning Objectives:

- Why collaboration is an important, but underutilized opportunity
- How and when to consider collaboration or restructuring as a strategy
- The collaboration process and timelines

Speaker Bio: Nora Hannah is a business executive, community volunteer, and nonprofit strategist, with a passion for citizen engagement. As Director of the Arizona Together for Impact Fund she is working to encourage and support formal enduring collaborations between nonprofit organizations in Arizona. Prior to this, Nora served as Chief Executive Officer of Experience Matters, a groundbreaking initiative to engage the time, talent and experience of adults age 50+ to help meet the growing needs in the public and nonprofit sectors. Nora also served as CEO of Landiscor, a national real estate information company she has co-owned and operated since 1997. Prior to Landiscor, she was the General Manager of the Forest Highlands project in Flagstaff, Arizona. Nora has been active in the community for over twenty-five years serving as chairman of the YWCA, Valley Leadership and the Children’s Action Alliance. She is also the recipient of the 1999 Chamber of Commerce Athena Award and one of the 2015 Outstanding Women in Business from the Phoenix Business Journal. Having lived in Arizona since she was two, Nora has a strong commitment to the quality of life in our community. She received her BS in accounting from Loyola Marymount University and her MBA at Arizona State University. She lives in Phoenix with her husband and, with three children launching as adults, is enjoying her life as an empty-nester.



Register at AZNonprofitConference.org

Day 1 Speakers – August 21, 2019

Session Date: Aug 21 **Session Time:** Breakout PM2 – 2:30-3:45pm

Title: Content Creation and Diversity: Moving Towards Inclusion Through the Use of Story and Shared Narrative

Level: Beginner

Speaker: Stephen Hodges - Creative Producer and President, Magic Synapse Productions



Description: Why do organizations and people struggle with the concepts of Diversity and Inclusion? Because, these buzzwords refer to those who aren't like us. In short, they're different. And that's the point! Everybody's different, just not in the way most of us think. This interactive session will explore diversity and inclusion trends in current media and mine participants unique stories to create a framework to embrace not only others' differences, but their own. The session will then give real world advice on how to use those stories to create inclusive narratives tailored to individual and organizational goals.

Learning Objectives:

- To create an understanding of what Diversity and Inclusion actually mean when it comes to content and media.
- To help participants create their own narratives and create commonalities for interaction with diverse audiences.
- An interactive session with real world advice from a speaker who has created their own diverse brand.

Speaker Bio: Stephen Hodges is a Creative Producer and Development Executive in Los Angeles with experience ranging from lead roles inside the world's largest toy manufacturer to an entrepreneur running a production company creating diverse, original IP. Stephen is also an award winning author. His inclusive children's picture series, "The Magic Poof" is the recipient of the Gold Mom's Choice award, honoring excellence in family-friendly media, products and services. "The Magic Poof" was most recently pitched to DreamWorks Animation as a television series. Stephen is a native of Phoenix and holds a Bachelor of Science in Intercultural Communication and a Bachelor of Arts in Broadcast Production from Arizona State University.

Day 1 Speakers – August 21, 2019

Session Date: Aug 21 **Session Time:** Breakout PM2 – 2:30-3:45pm

Title: Engaging and Cultivating Millennial Donors

Level: Intermediate

Speaker: Julia Patrick – CEO & Founder, American Nonprofit Academy

Description: Millennials are now the largest population of workers in the American labor force. They are the most educated, the most diverse and perhaps the most unknown. This generation is also poised to be the inheritors of the largest transference of wealth in American history. Is your nonprofit organization ready to welcome this donor profile? Do you even have a strategy to cultivate Millennials? These donors will have astounding impacts on the nonprofit sector. Learn who this generation is, how they think about philanthropy and how they can become a valued investor in your nonprofit mission, vision and values.



Learning Objectives:

- Understand what the Millennial demographic is concerned with
- How this group responds to messaging and communications
- How Millennial donors engage in philanthropy and it is a new path for most nonprofits!
- The process of building trust with Millennials online
- How Millennials want to be recognized and rewarded for philanthropic participation.

Speaker Bio: Julia C. Patrick is the CEO and Founder of the American Nonprofit Academy. Patrick sees the passion and dedication of service organizations daily. A multi-generational philanthropist, Board Member and volunteer, the CEO has been involved with community service since childhood. “From my parents, grandparents and husband to our own child, active community service has been at the heart of our family.” Patrick, a native of Phoenix, Arizona has served on both cultural and social service Boards. She has worked with more than 500 nonprofit organizations during her career. Prior to establishing the American Nonprofit Academy, Patrick published award-winning niche publications such as The Arts and Crafts Chronicle, The Wedding Chronicle, Food & Flourish and Frontdoors News over a 25 year span. Patrick’s work with nonprofits led her to realize these organizations were desperate for cost effective training and topic-specific education. The process of philanthropy is a constant in communities across America, but it’s a changing sector. “Benevolence is no longer the only reason for giving. Donors are expecting more, demanding measurements and seeking solutions,” explains Patrick. “Today’s nonprofits need to operate from a place of passion and accomplish their missions using all the business tools of a professional organization.” This is where the American Nonprofit Academy comes in. Using engaging panel discussions, lectures, on-line courses and workshops, with highly respected experts, Patrick and her team have developed innovative low-cost programs focused on educating nonprofits. “Our goal is to help nonprofits achieve their mission, vision and values,” adds Patrick. This includes working with nonprofit leadership level professionals, volunteers, donors and Board Members. Training topics are wide ranging and thought provoking. The Nonprofit Board Boot Camp moves Board Members through a fast-paced course on leadership, stewardship and governance. Individual workshops include subjects covering donor relations, marketing, communications, accounting, human resource management, real estate, event planning, auctions, donor demographics, naming rights and even social venture management.” As organizations search for innovations and solutions, our curriculum continues to expand.”



Register at AZNonprofitConference.org

Day 1 Speakers – August 21, 2019



Session Date: Aug 21 **Session Time:** Breakout PM2 – 2:30-3:45pm

Title: Shape Arizona's Future: Start Here

Level: Intermediate

Speaker: Jannah Scott - Partnership Specialist, US Department of Commerce, Census Bureau

Co-Presenter: Other Partnership Specialists

Description: This workshop will present important ways the nonprofit community can and should engage with the US Census to ensure an accurate count of all Arizonans in 2020. As most know, data from the census is critical to the economic and political future of every person living in the US. The workshop will be a combination of 1) providing an overview of the Census and new developments since 2010; examining useful resources including online and paper products; and discussing/developing strategies as to how each nonprofit can engage in this important effort. Census personnel will be available to help facilitate small group discussions on resources and strategy development.



Learning Objectives:

- Why the Census is so important (exact programs that are census-dependent)
- How to use the online resources to engage specific constituencies in the Census and to provide information for grantwriting, reporting, etc.
- How to be a knowledgeable spokesperson about the Census for your community

Speaker Bio: Jannah is an engagement specialist. Having worked in this realm for over 20 years, Jannah joined the Census Bureau after having served as Executive Director, Arizona Faith network. Prior to that, Jannah was a member of President Obama's administration as Deputy Director, Center for Faith-Based and Neighborhood Partnerships in the U.S. Department of Homeland Security. In that role, Jannah guided the engagement of faith-based and community groups on various issues within Homeland Security. Her most recent endeavors included: an assessment and engagement process in cities across the nation to promote the affiliation of diverse faith-based & community groups with local first responders. Jannah also helped groups get connected with President Obama's White House Office for Faith-Based and Neighborhood Partnerships and the other federal centers including Departments of Health & Human Services; Commerce; State; USAID; Agriculture; Labor; Veterans' Affairs; Housing & Urban Development; Education; Corporation for National Service, Justice, and the Environmental Protection Agency. From 2005 to 2009 she served as the Policy Advisor on Faith and Community Initiatives to former Arizona Governor Janet Napolitano. In that role, Jannah represented the Governor with community investment coalitions, faith leaders, cities and counties to establish local initiatives aimed at serving the poorest and most vulnerable citizens of the state. During that tenure, Jannah was privileged to host, with the Bush White House, the first-ever jointly sponsored national and state faith-based and community convening, bringing together over 2,000 faith and community leaders, elected officials and philanthropy organizations to seek solutions to common problems.



Register at AZNonprofitConference.org

Day 1 Speakers – August 21, 2019



Session Date: Aug 21 **Session Time:** Breakout PM2 – 2:30-3:45pm

Title: Attract, ENGAGE, and Retain Employees

Level: Intermediate

Speaker: Stephanie Waldrop – President, Employee Benefits International

Description: With Arizona unemployment the lowest it has been in over a decade, there has been a shift in focus for employers. Attracting quality employees is more difficult in a strong job market. Engaging employees critical for success. Retaining employees is more important than ever. In this session we will cover best practices for Attracting, ENGAGING and Retaining talent in a tight labor market. - State of Labor Market & Forecast - The Impact of Employee Benefit Programs - Nonprofit Benchmarking - Culture Cures to Engage Employees - The Cost of Turnover



Learning Objectives:

Attendees will learn a Roadmap for Success:

- State of Arizona's Labor Market
- Importance of Create Purpose for Engaged Employees
- Most Important Factors in Developing Talent
- How to compete with Benefits
- The Impact of Culture

Speaker Bio: Stephanie Waldrop is President of Employee Benefits International, Inc. of Arizona. Over the past 22 years she has held various executive level positions in the Employee Benefits industry. Stephanie started her career working with Insurance Companies including Humana, PacifiCare (now part of United Healthcare), and Aetna. Stephanie has spent that last 11 years consulting directly with Employers to achieve lower costs, improved value, and engaged employees to ensure them the highest return on the employee benefits investment. Stephanie brings consultative value to all aspects of employee benefits focusing on Program Design, Cost Containment, Compliance Guidance, Wellness Education, Employee Engagement, Benchmarking and packaging the most impactful benefits for an organization's employee population.



Register at AZNonprofitConference.org

Day 1 Speakers – August 21, 2019



Session Date: Aug 21 **Session Time:** Breakout PM2 – 2:30-3:45pm

Title: How Rockstar Leaders Cultivate Growth

Level: Beginner

Speaker: Molly Coke – Vice President of Sales & Support Services, Firespring

Description: Nonprofit leaders get pulled in so many directions that it can be challenging to take a step back and manage your organization effectively. Good leadership skills will help you attract (and retain) great talent and provide a solid path for organizational growth.

Learning Objectives:

- Keys to defining your organization's foundational values.
- Tangible tips in leadership vulnerability
- The 11 fundamental traits of a rockstar leader.

Speaker Bio: Molly Coke is a Gallup-Certified Coach and Culture Index Analyst. Molly is your go-to for inside knowledge on how to best cultivate the growth of your teams and leaders! Plus as a board member and lifelong volunteer, she understands the challenges that businesses and nonprofits face and focuses on developing strategies and methodologies that help organizations achieve ROI.



Register at AZNonprofitConference.org

Day 2 Speakers – August 22, 2019

Morning Keynote – 9:00-9:45am

Title: Graduating from the Kiddie Table: How to Stand Up, Speak Out and Claim Our Seat as Equal and Collaborative Community Partners!

Speaker: Kristen Merrifield, CAE – Chief Executive Officer, Alliance of Arizona Nonprofits

Description: The nonprofit sector holds a vital puzzle piece that often goes missing when we are not around the table for important conversations impacting all of our communities. Why aren't we at those tables? What can we do to be proactive and invite our community, business and government colleagues to participate with us as equal and collaborative partners? Join Alliance CEO Kristen Merrifield for an authentic and thought-provoking session where she will challenge existing messaging, confront misperceptions head on, and strengthen and highlight the nonprofit sector's role in our communities.



Speaker Bio: Kristen is a proven leader across multiple sectors invested in the development and success of others. She has more than 16 years' experience leading efforts to support community stakeholders, including extensive involvement working with professional associations, Chambers of Commerce and various community and business organizations, both public and private. Kristen is a fierce competitor, never satisfied with resting on her laurels and is always looking for the next big challenge to conquer. She is driven to be the best while remaining authentic and invested in the success of others. Wicked smart, calm under pressure, a seasoned leader and skilled communicator, she knows how to solve the big problems and create consensus around complex issues. Her WHY is to be the best version of herself so that she can share her knowledge and experience with others to help them reach their full potential.

Kristen is an active volunteer serving on various business and nonprofit community committees and boards. She holds a BS in Business Management from Grand Canyon University; a Certificate in Association Management from ASAE and the prestigious designations of Certified Association Executive (CAE) and Certified Nonprofit Accounting Professional (CNAP). She is also a graduate of the ASU Lodestar Center's Generation Next Nonprofit Leadership Academy and the ASBA Executive Business Mentoring Program.



Register at AZNonprofitConference.org

Day 2 Speakers – August 22, 2019

AM Breakout Sessions – 10:00-11:15am

Session Date: Aug 22 **Session Time:** Breakout AM - 10:00-11:15am

Title: The Workplace as an Engagement Tool

Level: Beginner

Speaker: Kathy Foster – Sr. VP, Colliers

Co-Presenter: Keith Perske & Rob Vantuyle

Description: Like most companies, non-profit and not-for-profit (NP/NfP) organizations struggle to hire and keep top talent. But unlike their for-profit peers, they are not able to throw money at the problem. That's where the design of the workplace can play a critical role. The workplace is not just a place to house the organization but also a place to create great experiences for employees, enable inspiring behaviors, boost physical and mental well-being and most importantly, link employees to the brand and mission of the organization. People who choose to work for NP/NfPs are special people. They are often more motivated by the mission and vision of the organization than by compensation. A well-located, well-designed and mindfully outfitted workplace can play a key role in making workers' days better and in doing so, retain your best and attract new talent. In this informative, dynamic and interactive session we will outline the ways workplaces can play their best role in making people's lives better. Through actual case studies with NP/NfPs we will help you: Understand the components of the workplace that can help you attract and retain talent; Give you tools to think about your own workplace; Help you prioritize where to start.



Learning Objectives:

- Understand the components of the workplace that can help you attract and retain talent.
- Give you tools to think about your own workplace.
- Help you prioritize where to start.

Speaker Bio: Kathy Foster, a seasoned real estate executive of 25+ years in commercial real estate, is driven by client service with a holistic approach by aligning clients' needs with their vision mission and culture. She has been focused on managing in-house corporate real estate and tenant brokerage for the past 10 years, as Managing Director of Corporate Solutions at Colliers International. Recently she received her Master's in CRE with CoreNet. In 2015 she was named a Top Woman in Business by the Phoenix Business Journal, 2017 awarded CRE Broker of the Year by the AZ Journal of Real Estate and Business. Kathy's passion for non-profits brings her creative and team approach to these businesses with unique challenges. Additionally, she volunteers and serves on several non-profit boards. Given her client focus, understanding of workplace strategies and corporate facilities, all roads lead to Kathy as the go-to for any organization's real estate needs.



Register at AZNonprofitConference.org

Day 2 Speakers – August 22, 2019

Session Date: Aug 22 **Session Time:** Breakout AM - 10:00-11:15am

Title: Moving From Exhausted Leadership to Effective Leadership

Level: Intermediate

Speaker: Tiffanie Dillard – Founder and Principal, Avenir Consulting Partners

Co-Presenter: Tara Bethell – Practice Leader AvenirHR, Avenir Consulting Partners



Description: Doing more with less, extending ourselves beyond our capacity and keeping up with the pace of change can be exhausting. We can't engage effectively with our clients, staff or families when we're "wiped out". Over time this leads to burnout which is a significant challenge in our sector. In this session you'll learn techniques to replenish your energy and create some "found" time so that you can sustain yourself over the duration of your nonprofit career. We'll take an essentialist's view of self-care and highlight how self-compassion can create time for play and creativity. We are including a "menu" of self-care tips that you'll be able to sample in the session and then draw from whenever you feel your energy or focus lagging, plus tools to eliminate clutter from your calendar. Practice these strategies to boost your focus and energy at work and home and watch your personal engagement in life increase while inspiring others around you. Whole person wellness starts with you.

Learning Objectives:

- Learn techniques to replenish their energy
- Take away a "menu" of self-care tips they'll sample in the session
- Gain tools to create "found" time on their calendar

Speaker Bio: Dr. Dillard leads Avenir Consulting Partners, a collective of experienced, credentialed, dedicated nonprofit leaders and consultants who Collaborate for the Common Good. She coaches individuals and teams in Organization Development, Culture Transformation, Strategic and Operational Planning and Talent Alignment. Recent projects have included: board effectiveness initiatives, creation of a nonprofit impact accelerator program, support of multiple mergers and acquisitions, team and individual coaching programs, staff development and alignment, HR practice reviews and process redesign, and succession planning. Her work leverages her hands-on experience and her sector-based research to support the unique needs of nonprofits at each life stage, from start-up to growth to complete organization transformation. Tiffanie has held Arizona based nonprofit roles of Chief Administrative Officer, Interim CEO, Chief People Officer, Founding Board Member, Board Member and Board Chair. Prior to launching her practice, she was an executive at a successful nonprofit and her early career includes two decades in HR leadership roles at CIGNA Healthcare, PetSmart Corporation and PetSmart Charities. Her PhD is in Human and Organizational Systems from Fielding Graduate University with a research emphasis on Organizational Psycho-dynamics, the often-unacknowledged factors that drive behaviors in the workplace. She holds Masters' Degrees in both Organizational Management and Human Development, as well as both national HR certifications. She is an Adler trained and ICF credentialed professional coach (ACC), qualified in multiple individual, group and organizational assessments, including the CCAT Nonprofit Organization Assessment, MBTI, Strengths Deployment Inventory and EQi-2.0. She is currently the Board Chair of the Arizona Organization Development Network and a co-founder of the Arizona Talent Collaborative.



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Day 2 Speakers – August 22, 2019



Speaker Bio: In a world of dry HR stereotypes, Tara is a refreshing oasis of humor, professionalism, and candor. She believes work should be both productive and fun, and brings to her work an unbridled enthusiasm for helping nonprofits leverage their most important asset, their staff. Her projects have led to increased employee engagement, reduced turnover, and the creation of effective evaluations and professional development plans. An Arizona native, she joined our team after serving as the Senior VP of Human Resources & Risk Management at a large nonprofit healthcare organization, where she changed the employee culture from one of basic compliance to a community of engagement. During her tenure, the organization received: Holleran's Highest Honor for Employee Engagement, Phoenix Business Journal's Healthiest Employer for mid-size companies (twice!) and the HR Best Practices award from the Journal. Tara earned an MBA from Grand Canyon University and a Bachelor of Science in Business Management, with an emphasis in Human Resources, from Arizona State University. She holds both national HR certifications, the Senior Professional Human Resources (SPHR) and the Society of Human Resources' Senior Certified Professional designation (SHRM-SCP). She is a proud graduate of Valley Leadership Institute's Class 33. When not working on Avenir projects, Tara, who recently became a certified yoga instructor, loves to drink wine, knit, and read like it's going out of style. She also enjoys hanging out with her adorable, yet beastly, children, and aspires to be an amazing stand-up comic.



Register at AZNonprofitConference.org

Day 2 Speakers – August 22, 2019

Session Date: Aug 22 **Session Time:** Breakout AM - 10:00-11:15am

Title: Taking the Right Steps Toward Nonprofit Sustainability

Level: Beginner

Speaker: Beverly Browning - Senior Consultant, Bev Browning, LLC



Description: This session will cover important steps in your organization's development processes that lead to sustainability. Learn how to take a new nonprofit from chaos to continuity. Avoid early startup mistakes through diligent and planned stakeholder engagement. A vision is admirable; however, it takes more than a passion for change to lay the framework for organizational sustainability. How do you get started? Are your board members oriented to their role and engaged in the road to organizational sustainability? Does everyone understand the mission and vision statements? Is your funding plan realistic? While you're frantically worried about where your next dollar will come from, are you planning for future years? When should you start an endowment fund? Answers to these questions and more will be explored during this session.

Learning Objectives:

- Increased understanding of why new nonprofits experience high failure rates.
- Increased knowledge of what steps must be taken to lay the framework for organizational sustainability.
- Increased understanding of who your stakeholders are and how to engage them from start-up to sustainability.

Speaker Bio: Dr. Bev Browning, has been consulting in the areas of grant writing, RFP responses, technical writing, and organizational development for over four decades. She has assisted her clients and workshop participants in receiving awards of more than \$500M. Dr. Browning is the author of 43 grants-related publications. She is trained in strategic planning and compression planning facilitation.



Register at AZNonprofitConference.org

Day 2 Speakers – August 22, 2019

Session Date: Aug 22 **Session Time:** Breakout AM - 10:00-11:15am

Title: How to Crush Nonprofit Marketing with Limited Staff, Budget, and Time

Level: Intermediate

Speaker: Bianca Buliga - Digital Marketing Manager, SEED SPOT

Description: Are you a staff member of a growing small or medium-sized nonprofit? Are you constantly wishing for more humans, money, and bandwidth to help you meet demanding sales/marketing goals? This workshop will interactively demonstrate how a young professional (who is the one-woman marketing machine of SEED SPOT) amplifies the mission, story, and impact metrics of a globally-ranked social impact incubator. It will outline tangible ways to build your brand, leverage partnerships, develop human connections, and rely on outside contractors to boost your knowledge. By the end of the workshop, you will engage in customer empathy mapping to better understand your target customer, identify new channels and best practices for growing your nonprofit's network, and collaborate with other marketing/sales professionals who engage in hand-to-hand combat on a daily basis to acquire more leads, followers, and subscribers.



Learning Objectives:

By the end of the workshop, attendees will:

- Engage in an interactive customer empathy mapping activity to detail the wants, needs, and fears of target customers
- Identify new channels and best practices for growing their nonprofit's network
- Understand how to leverage partnerships and outside contractors to boost knowledge
- Collaborate with other marketing/sales professionals who engage in hand-to-hand combat on a daily basis to acquire more leads, followers, and subscribers

Speaker Bio: Bianca is the Digital Marketing Manager of SEED SPOT, an organization designed to educate, accelerate, and invest in entrepreneurs who are creating solutions to social problems. SEED SPOT ranks as one of the "œTop 20 Accelerators in the World"™ by Gust and "œTop 3 social impact incubators in the United States"™ by UBI Global and Cisco. Bianca has been featured in the Bigfish Creative Group's AZ5C campaign for her work amplifying the stories, marketing, and branding of impact-driven business ventures nationwide. Born in Phoenix, Arizona, Bianca is a quadrilingual first-generation American of Romanian ethnicity. Bianca is a Leading for Change Fellow, a StartingBloc Social Innovation Fellow, and serves on the Board of The Immigrant Scholarship Hustle (ISH), a program that connects undocumented students with mentorship, educational scholarships and career counseling. Previously, Bianca consulted for IBM and ESAN Business School in Lima, Peru, and interned with the Arizona House of Representatives and Department of State in Bucharest, Romania. She is an avid reader, yogi, and world traveller always planning her next trip. Bianca earned her Bachelor's degree in International Affairs from Northern Arizona University in 2014 and her Master's degree in Global Affairs and Management from the Thunderbird School of Global Management in 2017.



Register at AZNonprofitConference.org

Day 2 Speakers – August 22, 2019



Session Date: Aug 22 **Session Time:** Breakout AM - 10:00-11:15am

Title: Creating and Managing an Endowment Fund

Level: Intermediate

Speaker: Ellis Carter President Caritas Law Group, PC

Description: This session will cover the role of the endowment in ensuring the sustainability of nonprofits, how to determine if your organization is ready to create an endowment, potential structural forms the endowment can take, as well as rules and tips for managing endowment funds.

Learning Objectives:

Understanding the following:

- Distinctions between permanent, temporary and quasi endowments;
- Various legal forms the endowment can take and the advantages and disadvantages of each
- Laws that govern the endowment investments
- Laws that govern endowment distributions
- Benefits of basing spending rate on total return
- How to consolidate funds to ease administration.

Speaker Bio: Ellis M. Carter, J.D., LL.M is the founder of Caritas Law Group, P.C., a boutique firm devoted to advising nonprofit, tax-exempt and socially responsible enterprises with respect to corporate, tax and regulatory issues. Ellis understands the fast moving social enterprise movement and the nuances of blending nonprofit, commercial, and hybrid legal structures. She represents social enterprises in entity selection, formation, and operational issues. Ellis has particular expertise in health care, grant-making foundations and educational institutions. Ellis received her J.D. cum laude from Seattle University School of Law in 1996 and her LL.M. in Taxation from the University of Washington's Graduate Tax Program in 1998. Ms. Carter has been selected by her peers for inclusion in Best Lawyers in America for Non-profit and Charity law 2007-2019, Lawyer of the Year for Nonprofits and Charities in 2015, and has been Rated "AV Preeminent" (the highest rating available) by Martindale Hubble. She was listed by Phoenix Magazine as a Top Lawyer for Nonprofit-Charities Law in 2007 and was named Non-Profit Advocate of the Year by the Volunteer Lawyers Program in 2002.



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Day 2 Speakers – August 22, 2019

Session Date: Aug 22 **Session Time:** Breakout AM - 10:00-11:15am

Title: Envision, Establish and Execute: Engaging Your Stakeholders to Create and Achieve Your Strategic Plan

Level: Beginner

Speaker: Lisa Deane - Chief Member Services Officer, State Bar of Arizona

Co-Presenter: Donita Douglas - Executive Vice President of Business Development, InReach, Continuing Education Solutions



Description: Join experienced association executives in this hand-on, interactive, workshop on how you create a workable strategic plan and get it across the finish line. Donita Douglas and Lisa Deane will share templates, tips and tricks to help you craft the plan that keeps you moving forward.

Learning Objectives:

- Learn how to develop a strategic plan than can be executed.
- Walk through steps in creating a strategic plan.
- Walk through templates that help move a strategic plan forward.
- Learn what makes plans fail and how to avoid the traps.

Speaker Bio: Lisa Deane is the Chief Member Services Officer for the State Bar of Arizona. She oversees all programs and services for the 24,000-member association, including professional development; publications; mandatory continuing legal education; substantive law committees, sections and specializations; diversity programs, and a resource center handling dues processing and inquiries from members and the public. Her position also includes working with Board task forces and the Program Review Working Group which focuses on reviewing all new and current programs and services. Before this long-time stint of working for the Bar, Deane was the Assistant Dean for Admissions at Franklin Pierce Law Center in NH. Positions held before that are distant memories. Deane holds a BA in Social Work from the University of New Hampshire, a JD from Franklin Pierce Law Center and a Franklin Covey certification to teach Project Management for Non-Project Managers. Lisa serves on a number of Boards including the Arizona Judicial College Board, the National Association of Bar Executives, the Arizona Women Lawyers Association and the Back to School Clothing Drive. Active for many years with the Association of Continuing Legal Education (ACLEA), Deane is a past president and also served as co-chair of the State and Providential Special Interest Group and the Executive Leadership Special Interest Group. For other fun Deane enjoys scuba diving, photography, camping and playing with her dog Mr. Tucker and grand-dog Skeeter.

Speaker Bio: Donita is responsible for establish and managing strategic relations, alliances, and networks within client verticals. She manages new business sales, the sales department and marketing strategies for sales. She has held the position as director of educational programs for the Oklahoma Bar Association, where she developed one of the most successful CLE programs in the United States. Donita has also served as an instructor at the Oklahoma City University School of Law, is an emeritus member of the Ruth Bader Ginsburg Inn of Court, and the past president of the Association of Continuing Legal Education (ACLEA). She holds a Bachelor of Fine Arts degree from Southern Methodist University and a Juris Doctor degree from the University of Oklahoma College of Law.



Register at AZNonprofitConference.org

Day 2 Speakers – August 22, 2019

Session Date: Aug 22 **Session Time:** Breakout AM - 10:00-11:15am

Title: Community Cultural Wealth

Level: Intermediate

Speaker: Dr. Jeff McGee – CEO, Cross-Cultural Dynamics, LLC

Description: This workshop engages participants by understanding and recognizing the difference between a deficit-thinking and empowerment thinking approach. By learning the concepts of Community Cultural Wealth, nonprofit organizations will be equipped to better collaborate with communities and clients that are different from themselves. By changing the way we view or perceive the clients we serve, we can better serve their needs through true collaborative measures.



Learning Objectives:

- Understand current definition of wealth
- Identify different forms of wealth
- Identify differences between cultural capital and community cultural wealth
- Recognize the Deficit thinking approach and empowerment approach

Speaker Bio: Dr. Jeff McGee is the CEO and Founder of Cross-Cultural Dynamics, LLC. His consulting firm trains leaders and teams in the areas of Cultural Competency, Leadership Development and Mindfulness to provide a framework for building successful relationships cross-culturally while also increasing their capacity to accomplish the mission and objectives of the organization. Before founding Cross-Cultural Dynamics, Dr. McGee has spent over 15 years working within the faith-based and nonprofit industries. Over the past 10 years, he has conducted research around cross-cultural interactions and through this, along with his practical experiences, has become a renowned expert within cross-cultural education and training. Dr. McGee holds a master's degree in Organizational Leadership and doctorate with distinction in Educational Leadership. In his free time, Dr. McGee spends time with family and friends along with writing, reading and playing xbox. He is a devout Christian and believes all people have a purpose in life. Lastly, he enjoys watching sports, especially his beloved Pittsburgh Steelers.



Register at AZNonprofitConference.org

Day 2 Speakers – August 22, 2019

Session Date: Aug 22 **Session Time:** Breakout AM – 10:00-11:15am

Title: Ten Real Estate Rules Every Nonprofit Should Know

Level: Beginner

Speaker: Carolyn Sechler – CPA, Sechler Morgan CPAs, LLC

Co-Presenter: Beth Jo Zietzer - President/Designated Broker, ROI Properties

Description: Before looking for property to lease or buy, have a plan. Your mission and business plan should drive the real estate and not the reverse. Before accepting real estate donations you need a plan and advisory team of professionals to guide. This will be a primer on real estate related basics.. policies, procedures, tax matters, donor options, etc.



Learning Objectives:

- Considerations and goals as it relates to real estate lease/buy/donor acceptance.
- Policies to adopt to prepare for either path: lease/buy or accepting donations of real estate.
- Assembling the proper advisors in anticipation.

Speaker Bio: Carolyn Sechler, CPA, CGMA is the CEO and founder of Sechler CPA PC, a Certified B Corporation and Arizona Benefit Corporation, in Phoenix, Arizona. She brings more than 30 years of experience to her work in tax, training / education and consulting exclusively to the nonprofit sector. In 2018, Carolyn transitioned her role to consultant and development for the newly formed firm of Sechler Morgan CPAs PLLC, now lead by team member, Kristina Morgan, CPA. In addition to her role as a CPA for nonprofits, Carolyn and members of this team serve on a multitude of boards and advisory committees of local organizations. In 2018, she joined the board of The Nexus Embassy US which embraces her longtime love of technology and vision. Thus her current passion is Blockchain and Cryptocurrency and the impact these tools will provide to our future.

Co-Presenter: Beth Jo Zeitzer is the President and Designated Broker of R.O.I. Properties. Founded in 2003, R.O.I. Properties is a full service real estate brokerage and consulting firm focused on serving non-profit organizations and businesses real estate needs, including the acquisition, leasing, sale and sale leaseback of all commercial and residential asset classes, including office, special use, schools, group homes, senior living and rehabilitation facilities. Prior to founding R.O.I., Beth Jo was the Director of Commercial Properties at Del Webb. Before serving as Director of Commercial Properties for Del Webb, Beth Jo, who is an attorney by training, served as Corporate Counsel for Del Webb Corporation. Prior to that, Beth Jo was in private practice, performing loan workouts and real estate transactions during the RTC period. She is a graduate of the University of Arizona with a B.A. in General Studies (with Real Estate and Marketing Emphasis) and the University of San Diego Law School, where she was the Research Editor of the Law Review, and the recipient of the Hahn Award for Excellence in Real Estate. Beth Jo is a licensed attorney in the States of Arizona and California, as well as a licensed Real Estate Broker in Arizona. She is also a Real Estate Special Commissioner (Judicial Branch of Arizona, Maricopa County). Beth Jo was named one of the 50 Most Influential Women in Arizona Business, by AZ Business Magazine, in 2013. She is a Board Member of APLA (Arizona Private Lenders Association), Past President of AZCREW (Arizona Commercial Real Estate Women), Past President of TMA (Turnaround Management Association), a member of the Arizona Bankers Association, Arizona Trustee Association, Valley Partnership, Urban Land Institute, California Receivers Forum, the Arizona Credit Union Collectors Council, Risk Management Association and other Real Estate trade organizations.



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Day 2 Speakers – August 22, 2019



Session Date: Aug 22 **Session Time:** Breakout AM - 10am-11:15am

Title: Advocacy Roadmap: Making “Cents” of Your Advocacy Plan

Level: Beginner

Speaker: David Martinez III – Director, Capacity Building & Community Engagement, Vitalyst Health Foundation

Description: Nonprofits and industry professionals have a vital role to play in educating and collaborating to advocate for our causes and programs. Contrary to popular misconception, nonprofits, public charities and other stakeholders can lobby, although not all advocacy requires direct action in the halls of Congress or at the State Capitol. Learn easy tools to help you become a better advocate and share your story and impact in our communities.

Learning Objectives:

- Learn importance of being a better advocate
- Learn how advocacy direct correlates to your annual revenue/budget
- Formulate your own simple annual plan

Speaker Bio: David Martinez III serves as Director of Capacity Building and Community Engagement, working with community-based leaders, organizations, and coalitions to increase capacity and civic participation. Prior to Vitalyst, Martinez was project manager for the Center for the Future of Arizona, and community engagement manager for St. Mary’s Food Bank Alliance. He is a Flinn-Brown Fellow with the Arizona Center for Civic Leadership, and involved with the Arizona Community Foundation’s Center for LGBTQ Philanthropy and the Desert Botanical Garden. Originally from Marana, Arizona and one of six children, David is a first generation college student earning a B.A. in Secondary Education, Political Science and Journalism from The University of Arizona. He served as Student Regent on the Arizona Board of Regents, worked at the UA Office of Institutional Equity, and interned with Congressman Raul Grijalva. Martinez currently lives in Central Phoenix and as a localist, loves to explore Arizona.



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Day 2 Speakers – August 22, 2019

Luncheon Panel – 12:00-12:45pm

Title: Preserving the Charitable Deduction: How We Got Here & Where We Go From Here

Speakers:

Kristen Merrifield, CAE – Chief Executive Officer, Alliance of Arizona Nonprofits

Laurie Liles – President & CEO, Arizona Grantmakers Forum

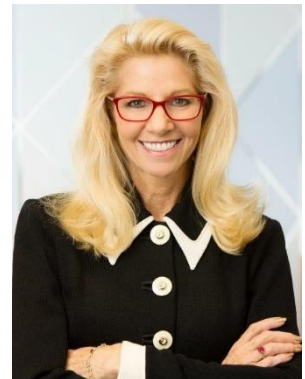
Brandy Petrone – Senior Associate, Goodman Schwartz Public Affairs

Penny Allee-Taylor – Chief Public Policy Officer, Valley of the Sun United Way

Description: ...

Kristen Merrifield: Kristen is a proven leader across multiple sectors invested in the development and success of others. She has more than 16 years' experience leading efforts to support community stakeholders, including extensive involvement working with professional associations, Chambers of Commerce and various community and business organizations, both public and private. Kristen is a fierce competitor, never satisfied with resting on her laurels and is always looking for the next big challenge to conquer. She is driven to be the best while remaining authentic and invested in the success of others. Wicked smart, calm under pressure, a seasoned leader and skilled communicator, she knows how to solve the big problems and create consensus around complex issues. Her WHY is to be the best version of herself so that she can share her knowledge and experience with others to help them reach their full potential. Kristen is an active volunteer serving on various business and nonprofit community committees and boards. She holds a BS in Business Management from Grand Canyon University; a Certificate in Association Management from ASAE and the prestigious designations of Certified Association Executive (CAE) and Certified Nonprofit Accounting Professional (CNAP). She is also a graduate of the ASU Lodestar Center's Generation Next Nonprofit Leadership Academy and the ASBA Executive Business Mentoring Program.

Laurie Liles: Laurie became president and CEO of the Arizona Grantmakers Forum in 2015. She grew up in Arizona and has worked throughout her career to make our state a better place to live and work. With more than two decades of advocacy and association leadership experience, Laurie is passionate about connecting people who want to make a difference in others' lives. She honed her advocacy chops at the Arizona Hospital and Healthcare Association, where she served as president and CEO and as senior vice president of public affairs, among other



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Day 2 Speakers – August 22, 2019



roles. In 2014, she was a Washington, D.C. correspondent for Cronkite News, covering politics, immigration and Indian affairs for Arizona news media outlets. Laurie has a bachelor's degree in political science and in December 2014 earned a master's degree from Arizona State University's Walter Cronkite School of Journalism and Mass Communication. She lives in Phoenix with her husband, two superstar teenagers, and the world's most adorable cocker spaniels.

Brandy Petrone: Brandy Petrone is a Senior Associate at Goodman Schwartz Public Affairs. She has been representing and assisting the firm's private and public sector clients at the state and local level since 2006 and is a key contributor to the strategic and tactical advice given on legislation and legislative strategy. Prior to joining Goodman Schwartz Public Affairs, Brandy worked in the nonpartisan Research Staff Department of the Arizona State Senate, working on commerce and economic development, health and appropriations issues. Brandy holds a B.S. in Business Administration, with an emphasis in International Marketing, and a B.A. in Spanish from Northern Arizona University.

Penny Allee-Taylor: As Chief Public Policy Officer, Penny oversees all advocacy and public policy efforts for Valley of the Sun United Way at the federal, state, and local levels. She develops plans and strategies to address issues around youth and children, hunger and homelessness, and financial stability for individuals and families. Prior to joining United Way, Penny served for 20 years in the Corporate Public Affairs Department of Southwest Gas Corporation managing issues at the Arizona State Legislature, the Governor's Office, state agencies, and also worked with Arizona cities, towns, and counties and with the federal delegation. Prior to joining Southwest Gas, Penny served in other government relations capacities at the federal, state and county levels. Penny has been an active member of numerous professional, community and civic organizations and was elected to the Maricopa County Charter Committee. Penny graduated from Arizona State University with a Bachelor of Science in Political Science.



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Day 2 Speakers – August 22, 2019

Deep Dive Sessions – 1:00-3:45pm

Session Date: Aug 22 **Session Time:** Deep Dive - 1:00-3:45pm

Title: Dirty Money - Ethics In Nonprofits

Level: Intermediate

Speaker: John Scola - Chief Development Officer, Boys & Girls Clubs of Metro Phoenix

Description: Ethics may seem simple and straightforward until you confront them head-on in a real life scenario. "Dirty Money" is a lively program addressing the real world of ethics and fundraising. Attendees should bring their energy, experiences, common sense AND their sense of humor for this discussion on ethics like none you've seen before.



Learning Objectives:

- Provide a platform for nonprofit leaders to develop ethical standards
- Provide tools to determine Gift Acceptance Policies
- Encourage nonprofit leaders to understand at a deeper level how to recognize and manage "conflicts of interest"
- Elevate transparency among nonprofit organizations

Speaker Bio: John A. Scola, CFRE is the Chief Development Officer for Boys & Girls Clubs of Metro Phoenix. Known as a leader who drives results with his head and his heart, his breadth of experience includes: organizational development, strategic planning, capital campaigns, international fundraising, major gifts, corporate and foundation relations and annual giving. In addition, he has extensive volunteer leadership training and management experience and has worked with a variety of organizations in the areas of board and staff development and strategic planning. John is an AFP-Certified Master Trainer, the recipient of Greater Arizona Chapter's Outstanding Executive Award, a certified BoardSource trainer and teaches at Arizona State University.



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Day 2 Speakers – August 22, 2019



Session Date: Aug 22 **Session Time:** Deep Dive - 1:00-3:45pm

Title: Nonprofit Succession Planning - Creating a Continuity of Leadership to Advance Your Mission

Level: Intermediate

Speaker: Jeffrey Wilcox - President & Chief Mission Advancement Officer, Third Sector Company, Inc.

Co-Presenter: Steve Browning



Description: The future of any organization rests on its abilities to assure there is a continuity of leadership in place to advance its mission. Succession planning is one of the most misunderstood concepts in nonprofit capacity-building today; believing its only about people in the office or in the boardroom leaving, rather than a deliberate commitment to attracting, growing, and keeping talent while always prepared for their inevitable transitions. During this learning lab, participants will complete a self-assessment about their succession culture, receive tools for handling an unexpected break in leadership, review the essential elements of a succession plan, and how to incorporate succession planning into performance review, policy development, and strategic planning processes.

Learning Objectives:

At the conclusion of the Succession Planning Learning Lab, participants will leave with:

- A Call to Action for their organization to look upon Leadership Continuity on par with Organizational Development and Resource Development;
- A Guide for Completing an Emergency Succession Plan for unplanned transition at the Executive Director and Board Chair levels;
- A Set of Succession Planning Policies for Discussion, Modification, and Approval;
- An Organizational Assessment to initial discussions at senior team meetings and at a board retreat regarding succession planning readiness; and
- An awareness for the Diversity, Inclusion, Equity and Access factors that either promote or inhibit talent development in a nonprofit and its leadership continuity

Speaker Bio: As President and CEO of The Third Sector Company, Jeffrey Wilcox leads one of the largest teams of professionals in the United States dedicated to the teaching, advancement and practice of professional interim executive leadership and nonprofit succession planning. Since opening its doors in 2002, Third Sector Company has served over 700 nonprofit organizations from its bases of operations in Southern California, Sacramento, Seattle, and Vancouver, British Columbia. Jeffrey is the former Senior Vice President for Community Development of United Way of Greater Los Angeles, and Valley of the Sun United Way in Phoenix, Arizona, and executive director of CHOC Children's Hospital Foundation in Orange County, CA. He is the former nonprofit columnist for the Long Beach Business Journal; founder of "œThe Interim Executives Academy;" the nation's largest formal training program for nonprofit interim leaders and author of "œThe Nonprofit Leader of the New Decade." He co-developed and is the former lead trainer for the Wells Fargo New Executive Directors Institute of Greater Los Angeles. and is a former national chairman of the Executive Transitions and Succession Planning Affinity Group for the Alliance for Nonprofit Management. He currently serves on the board of AFP Advancement Northwest in Seattle and is the immediate past chairman of the Executive Advisory Board of the School of Business, Government and Economics at Seattle Pacific University.



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Day 2 Speakers – August 22, 2019



Speaker Bio: Stephen Browning has had almost 30 years of progressively responsible leadership positions with nonprofit organizations, including 26 years with the American Cancer Society in Southern California. His positions included Director of Special Events in Los Angeles, the first executive director in the desert communities (Palm Springs, Rancho Mirage and the Coachella Valley), Regional Vice-President of the organization's largest region in the U.S. and V.P of Distinguished Giving (Major Gifts) for the California Division. In addition, he served as National President & CEO of Pet Partners based in Bellevue, WA. He has served on NPO boards in California, Washington, Arizona and Mexico, during a 14-month sabbatical living internationally in Thailand and Mexico. While working in California, he received the American Cancer Society's *Dare to Do Award*, was acknowledged as one of the Society's 17 most successful staffing pockets in the U.S. and received the highest staff engagement scores (productivity, goal achievement, worksite satisfaction and mission-focused) for the division, twice. He is a resident of Tucson and an avid Wildcat alumnus and currently serves on two advisory boards for the University of Arizona.



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Day 2 Speakers – August 22, 2019



PM1 Breakout Sessions – 1:00-2:15pm

We are pleased to bring you this session in partnership with:



Session Date: Aug 22 **Session Time:** Breakout PM1 – 1:00-2:15pm

Title: Executive Roundtable

Level: N/A

Speaker: Facilitated by Michael Barry – CEO, ONE – Organization of Nonprofit Executives

Description: TBA

Learning Objectives: TBA

Speaker Bio:

Michael Barry was appointed as Executive Director of ONE in March of 2018 and is the first individual to hold this position. Previously, he worked as Director of Business Development for Experience Matters, where he directed a team responsible for placing individuals with a lifetime of experience in nonprofits who could directly benefit from that experience. Prior to that he was both an Encore Fellow and a consultant to the American Lung Association in Arizona. Michael spent the majority of his career in the financial services sector, retiring from American Express in 2012 as Vice President of Business Development Strategy for the Corporate Services division.



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Day 2 Speakers – August 22, 2019



Session Date: Aug 22 **Session Time:** Breakout PM1 – 1:00-2:15pm

Title: Building the Capacity Ecosystem

Level: Beginner

Speaker: Jennifer Bonnett - Associate Director, Nonprofit Lifecycle Institute

Description: The social sector is integral to a community's success. The Nonprofit Lifecycle Institute believes that building stronger nonprofits builds stronger communities. To create that vision, the entire social sector ecosystem needs to be working toward the goal of stronger nonprofit organizations. The social sector ecosystem includes nonprofit organizations, funders and consultants all working toward building capacity for the system. The workshop will help identify how each component of the ecosystem can take action to build the capacity of the system: how organizations can be more effective requesting capacity support from funders and/or consultants, how funders can be more effective delivering capacity support for organizations and how consultants can be more effective working with the organizations.



Learning Objectives:

Speaker Bio: Jennifer H. Bonnett, MPA On January 1, 2019, Jennifer Bonnett joined the Nonprofit Lifecycle Institute as Associate Director as its first Associate Director. This position allows her to help shape the future of the Institute. Jennifer is an experienced nonprofit professional, committed to building strong communities by supporting the development of nonprofit organizations. She is driven by her passion to help mission-focused organizations achieve their visions. In 2015, Jennifer founded JHB Executive Consultants. This firm focuses on a holistic and pragmatic approach to nonprofit capacity building using the Nonprofit Lifecycle framework. Previously, she served as the executive director of the member-based Arizona Public Health Association and Valley Permaculture Alliance. Through her leadership and collaborations, the Arizona affiliate was recognized as the Affiliate of the Year by the American Public Health Association. Jennifer holds a Masters of Public Administration with a Nonprofit Concentration from Arizona State University. She currently serves as a Nonprofit Lifecycle Institute consultant to both the ATLAS and AGILE programs at Virginia G. Piper Charitable Trust. Jennifer is a former Fellow of St. Luke's Health Initiatives Alliance (now Vitalyst Health Foundation) and a member of the Vitalyst Health Foundation's Consultants Community of Practice. She has served on various boards in Arizona, such as the i.d.e.a. Museum and Act. She is committed to her community and looks forward to building a resilient ecosystem that will support strong nonprofits and stronger communities.



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Day 2 Speakers – August 22, 2019



We are pleased to bring you this session in partnership with:



Session Date: Aug 22 **Session Time:** Breakout PM1 – 1:00-2:15pm

Title: What Young Nonprofit Professionals Need to Engage Fully In the Sector

Level: Beginner

Speaker: Julie Euber - Vice President, Young Nonprofit Professionals Network Phoenix



Description: Promising, driven employees are a key resource for any nonprofit and must continue to grow to adequately face the new and ever-evolving challenges in our communities. Likewise, managers want to ensure employees are engaging with growth opportunities that provide long-term value. How can you be sure that you and your employees are getting the professional development needed to continue to thrive and engage fully in the sector? For over 11 years, the Young Nonprofit Professionals Network Phoenix has hosted professional development opportunities for young nonprofit professionals to help create a thriving, resilient, and inclusive social sector in Phoenix. In this breakout session, we will review key competencies integral to developing the talents of nonprofit professionals including effective communication, personal management, leadership capabilities, and technical skills. We will challenge organizations to consider what professional development resources are currently being accessed and offer suggestions on how to expand strategically.

Learning Objectives:

Speaker Bio: Julie Euber serves as Vice President of the Young Nonprofit Professionals Network (YNPN) Phoenix and works with the board to support a network of diverse thought leaders dedicated to creating a thriving, resilient, and inclusive social sector in Phoenix. Julie also serves as TGen's Manager of Education and Outreach. In this role, she is responsible for oversight of all education and outreach initiatives at TGen that increase the community's working knowledge of genomics and educate, train and inspire the next generation of researchers and physicians. She seeks and establishes productive partnerships with local academic institutions and businesses and initiates innovative programs and joint ventures, including the institute's flagship internship program Helios Scholars at TGen, new high school program TGen Bioscience Leadership Academy, academic year internships, public tours, and events supporting the STEM education community. She holds a BA in Anthropology and English with a minor in biology from Indiana University and earned her MA in Anthropology from Arizona State University. Julie is an alumna of City Year New York and the American Express Leadership Academy at the ASU Lodestar Center for Philanthropy and Nonprofit Innovation.



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Day 2 Speakers – August 22, 2019

Session Date: Aug 22 **Session Time:** Breakout PM1 – 1:00-2:15pm

Title: Engaging Through Team Dynamics

Level: Intermediate

Speaker: Jerry Houston – CEO, HPISolutions

Co-Presenter: Laura Dillingham - Senior Strategic Partner, HPISolutions



Description: This highly interactive workshop is designed for all kinds of leadership levels through your non-profit, from Volunteers, to Staffers, to the CEO/Executive Director, and the Leadership of the Board. You may have to work with a team that has already been formed and/or you may only have a limited number of people to choose from when putting a team together. To understand how to build high-performance teams it is critical to be knowledgeable about specific key elements such as what makes a team, the optimal team size, types of teams, team stages and development, and understanding what teams need to be successful. Most critical is the ability to apply this information as you build your team. Successful leaders can put all these elements together and apply the techniques that foster synergy and cohesiveness. They understand and apply critical factors in building a good team or even better, building a high-performance team. In this fast-paced and highly interactive experience you will: “Ç Understand what makes a team “Ç Identify the key elements of a team “Ç Know what teams need to be successful “Ç Understand the life cycles of a team “Ç Identify and practice team techniques that foster synergy and cohesiveness Your presenters, Jerry Houston and Laura Dillingham, will use their combined expertise in leadership development and behavioral analysis over the past 27 years as partners in HPISolutions to guide you down a path of deeper understanding and application of techniques that will serve you for years to come.

Learning Objectives:

- What defines a team and the types of teams.
- Team needs and how to address and resolve conflict.
- Team formation and life cycle.
- Tools that make teams succeed.

Speaker Bio: Jerry is the founder and CEO of HPISolutions, formerly known as Houston Partners International. The business was founded in Chicago, Illinois in 1992 and relocated to Arizona in 2002. Jerry’s education background is in business administration and operations management. He has held key management positions in industry for over thirty years. Jerry has been awarded TTI Success Insights President’s Award. Jerry has received multiple awards in community service, including the Arizona Small Business Association Volunteer of the Year. In addition, Jerry has dedicated his career to the development of human potential through a variety of certifications including: Continuous Quality Improvement, Attribute Index Analysis, Acumen Index Capacity Analysis, Behaviors and Values Analysis, Performance DNA and HD Analysis, Emotional Quotient and Stress Analysis and is a Certified Stages of Growth Consultant. A long-time community activist, he has served as president of various associations for developmentally disabled individuals, a homeless family program, church leader, heavy involvement in local and regional chambers of commerce, and an officer in the Business Mentor Team of Arizona. He has served on multiple task forces and committees in the educational sector. Jerry has lead the HPISolutions team, which celebrates its 27th year in business in 2019, providing services dedicated to maximizing the potential of hiring, retention and ongoing development of organizations and to reach strategic alignment while maintaining sustainable growth for our clients.



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Day 2 Speakers – August 22, 2019



Co-Presenter Bio: Laura has been a Senior Strategic partner with HPI Solutions for over nineteen years. She has over thirty years of public and private sector experience. Laura served as the Director of Communication and Legislative Policy for the Arizona Department of Juvenile Corrections and worked with the State of Arizona for twenty-five years. She is an Executive Coach who works with all levels in an organization. Laura facilitates workshops, seminars, the Virtual Management Development and Executive Leadership Programs. She has developed, facilitated and provided services in a multitude of areas including job benchmarking, hiring, performance improvement, communication, customer service, team building, creative thinking, strategic planning, project management, mediation, developing public speaking, presentations, and more. Laura has a Lifetime Teaching Certificate from the Maricopa Community College Board and has served as an adjunct professor for Arizona Government University, Rio Salado College and the University of Arizona. Laura has dedicated her career to the development of human potential through a variety of certifications including: Attribute Index Analysis, Acumen Index Capacity Analysis, Behaviors and Values Analysis, Performance DNA and HD Analysis, Emotional Quotient, Stress Analysis, Continuous Quality Improvement, Performance Based Interviewing, Team Building and Leadership Development, the American Society for Training and Development (ASTD), and she is a Certified Public Manager (CPM). Laura has dedicated her life to community service working as the Track and Field Official for Special Olympics for thirty-two years, cradling drug-addicted newborns at several valley hospitals, as well as, serving on community boards dealing with at-risk youth.



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Day 2 Speakers – August 22, 2019



Session Date: Aug 22 **Session Time:** Breakout PM1 – 1:00-2:15pm

Title: How to Spot and Solve Nonprofit Burnout

Level: Intermediate

Speaker: Laura Ingalls – CEO, Abeja Solutions



Description: The high staff turnover rate (19%) in the nonprofit industry is a cause for concern. It limits our ability to consistently engage our communities, boards and donors. Yet, most nonprofits (84%) do not have a retention strategy in place for their teams, much less a wellness program to help people recognize and address the signs of compassion fatigue. This panel will examine why the nonprofit sector and certain staff positions are especially prone to burnout, the 5 domains of well-being, the warning signs of burnout, and what steps organizations can be put in place to help staff practice self-care and feel more supported. Attendees will leave the session with a handout of tips for managing burnout as an organization and as individuals. (Note: This workshop is organized as a moderated panel that would include a wellness expert, fundraising director and executive director. The nonprofit panelists are from high-stress sectors including cancer support, hunger relief and animal welfare.)

Learning Objectives:

- Be able to identify specific signs of nonprofit burnout
- Put interventions in place to prevent and address burnout
- Apply the 5 domains of well-being to create a wellness culture within organizations
- Examine best practices for retention strategies

Speaker Bio: Laura Ingalls is a strategic communicator who loves bringing stories to life. A fourth-generation journalist, she worked in both print and broadcast media, including producing CNN's prime time newscast in Asia. Laura's nonprofit experience includes securing elite media coverage in Washington, DC, serving as a humanitarian spokesperson in Iraq and strengthening Nigerian civil society groups. She holds a journalism degree from the University of Arizona and a master's degree in integrated marketing communications from West Virginia University.



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Day 2 Speakers – August 22, 2019

Session Date: Aug 22 **Session Time:** Breakout PM1 – 1:00-2:15pm

Title: 3 Things All Nonprofits Should Know About Cyber Security To Avoid Scams, Threats and Disasters

Level: Beginner

Speaker: George Heiler – Nerd, Nerds on Site

Description: This presentation will be designed to provide executive directors, board members, business leaders and employees a handful of key facts and protocols to immediately improve their knowledge of cybersecurity and how to prevent malicious attacks on their information technology and systems. This presentation will begin with a relatable overview of the current threats that goes beyond simply describing a phishing e-mail scam and into details about typical threats to all systems, modern relevant case studies, and the cyber security environment unique to nonprofit organizations, especially those that accept donations and other forms of billing and payment. After discussing those topics, we will give advice on A) how to improve your cyber security protocol starting tomorrow, for free and B) what the latest cutting-edge technology in this space is across the world. In both categories we have meaningful and actionable advice for members of all sizes and types of organization, whether they are a manager or an intern. We plan to discuss these topics in layman's terms and make sure all members of the audience, regardless of their technological background, understand and relate to the content. If available, we would have a few succinct slides and/or video to present as well.



Learning Objectives:

Speaker Bio: George Heiler is a recent graduate from the Honors College at Arizona State University, having completed three degrees Summa Cum Laude: Computer Information Systems, Finance and Supply Chain Management. He is an entrepreneur and is a relatively new franchisee of the global Nerds on Site team. With a background ranging from Corporate Finance to Software Engineering, George is passionate about technology and software, including the many challenges they pose around cybersecurity in today's world. Working with the founder of Nerds on Site, George consults all organizations of small to medium size on their cybersecurity needs, specifically in selling a proprietary, best-in-class product called adam:ONE (Website: adamnet.works). A Phoenix native, George plans to continue his work in IT and seek entrepreneurial opportunities in the Phoenix area, due to his love of the state of Arizona.



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Day 2 Speakers – August 22, 2019

PM2 Breakout Sessions – 2:30-3:45pm

Session Date: Aug 22 **Session Time:** Breakout PM2 – 2:30-3:45pm

Title: How to Build a Social Enterprise or Earned Revenue Strategy for Your Nonprofit

Level: Intermediate

Speaker: Kristiana Fox - Founder/ CEO, Think Outside the Box LLC

Co-Presenter: Kay McDonald – Founder/CEO, Charity Charms



Description: Have you thought about ways that you can increase revenue for your nonprofit to create a sustainable source of funding? Most people have heard of a social enterprise, but we will explore what a social enterprise is, examples and brainstorm creative and innovative ideas for your nonprofit. This is a way to engage your staff and board in working towards a common goal- and we will determine in terms of stage of development, income and level of risk if your organization is ready for a social enterprise. If your organization may not be ready for a social enterprise, an earned revenue strategy may be a better option to implement. We will discuss what an earned revenue strategy is, examples, and how this can be an alternative to create revenue for your nonprofit. We will help you determine your assets, capabilities and opportunities that your nonprofit has in terms of an earned revenue strategy and brainstorm ideas. Lastly, you will come away with an action plan in terms of doing market research, creating a business plan and presenting the plan to your board, as well as helpful resources and sources of funding.

Learning Objectives: You will learn what a social enterprise is, examples and how it is an important part of sustainability. We will brainstorm creative and innovative ideas for your nonprofit. We will determine in terms of stage of development, income and level of risk if your organization is ready for a social enterprise. We will discuss what an earned revenue strategy is, examples and how this can be an alternative to create revenue for your nonprofit. We will help you determine your assets, capabilities, and opportunities that your nonprofit has in terms of an earned revenue strategy and brainstorm ideas. You will come away with an action plan in terms of doing market research, creating a business plan and presenting the plan to your board, as well as helpful resources and sources of funding.

Speaker Bio: Kristiana Fox is the Founder and CEO of Think Outside the Box LLC, a consulting company that provides creative and innovative solutions using the best aspects of business and nonprofit in social enterprise. Kristiana is a Phoenix native and a graduate of Arizona State University with a Bachelor's degree in Science, a Master's degree in Business Administration in General Management and a Certificate in Nonprofit Management. She balances half of her time in the nonprofit world and the other half in the entrepreneur world and is committed towards helping nonprofits become more sustainable and businesses become more socially conscious. She is a B Corporation and Conscious Capitalism Consultant and believes that both nonprofits and businesses should be purpose-driven in terms of their strategy, leadership and culture. She is a member of the Alliance of Arizona Nonprofits, Local First Arizona, Social Enterprise Alliance and the Conscious Capitalism Chapter of Arizona where she is also an Ambassador. She has been a speaker at the ASU Lodestar Conference, Co+Hoots MWMT, Phoenix Startup Week, and is a mentor for TEM 200, Social Entrepreneurship at ASU. She is also an Advisor to CoFounders



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Day 2 Speakers – August 22, 2019



Lab and has previously been a Mentor at Co+Hoots Youth Startup Weekend and Phoenix Startup Weekend.

Speaker Bio: Kay McDonald is Founder and CEO of Charity Charms. Kay McDonald is an accomplished CEO with over 15 years of experience in the cause jewelry industry. She currently oversees operations at Charity Charms, a B2B boutique wholesale jewelry company specializing in custom logo branded jewelry. Charity Charms creates custom programs for nonprofit organizations, charities, schools, and cause-minded businesses. Kay has a passion for creating special marketing campaigns around products that brand important causes in a memorable way, and frequently partners with organizations that emphasize philanthropy, awareness, and building a better community. Kay sees the importance of empowering women and helping them to build their careers. Before launching Charity Charms, Kay was co-founder and owner of Regalia Accessory Collection Inc for 19 years. Regalia Accessories Inc focused primarily on retail, online, and wholesale stores in addition to event sales. After seeing the need for charities to have more meaningful, wearable items, Kay launched Charity Charms. As the visionary behind the company, Kay oversees jewelry design and production while coordinating marketing and PR efforts. She also maintains new account development and builds strategic partnerships. Moving forward she is putting renewed effort into aligning corporations with causes through the power of charms. Kay earned an associate of arts and sciences in Fashion Merchandising from the Fashion Institute of Technology while working in the garment district in New York City. Shortly after, she attended Arizona State University where she received a bachelor's in communications. In her spare time, she enjoys spending time with her dogs, husband Ian, traveling and discovering new jewelry trends to bring to Charity Charms' clientele.



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Day 2 Speakers – August 22, 2019



Session Date: Aug 22 **Session Time:** Breakout PM1 – 1:00-2:15pm

Title: Create and Successfully Present Your Giving Season Plan

Level: Beginner

Speaker: Brianna Klink - Chief Operations, Officer Abeja Solutions

Co-Presenter: Terri Shoemaker - Development & Marketing Director, Association of Arizona Food Banks

Description: It takes years to cultivate, engage and steward individual donors properly. Yet many nonprofits ask their fundraisers to hit year-end goals with little basis in donor data or industry benchmarks. This session will prepare fundraisers to draft a strategic 2019 Giving Season Campaign Plan and successfully present it to their supervisors and board members. The session will discuss three different campaign models to help attendees decide which fits the maturity stage of their current fundraising operations. Attendees will work on a template to plan out their Giving Season activities, project ROI for their chosen tactics, and discuss how to engage staff and board members in effective year-end fundraising. Finally, the trainers will examine the basic elements that should be in any winning leadership presentation.



Learning Objectives:

- Be able to draft a strategic Giving Season Campaign Plan
- Set goals based on donor data & industry benchmarks
- Choose appropriate strategies and project ROI for tactics
- Learn presentation elements for engaging leadership and gaining buy-in

Speaker Bio: Brianna Klink is an organizational development and corporate training expert who has helped nonprofits, startups, and Fortune 500 companies boost the growth and performance of their talent. Most notably, she helped Longboard Asset Management double revenue, PetSmart Charities save 40,609 more pets from euthanasia, and Corpedia launch an e-learning product that was acquired by NYSE Euronext. Brianna serves as the product developer for Beezable.com, a tool that seeks to disrupt the donor mail industry and create more reliable revenue for nonprofits.

Speaker Bio: Terri Shoemaker is Director of Development and Marketing at the Association of Arizona Food Banks (AAFB) and Chief Strategy Officer at Abeja Solutions. Prior to these positions, she worked in development at both PetSmart Charities and Best Friends Animal Society. She came to work in animal welfare after three years at the University of Maine System, where she instituted and bolstered fundraising operations at the three of seven campuses in the system. Before this position, Terri served in various direct marketing roles at Feeding America (formerly America's Second Harvest) from 1997 to 2004. During her tenure at Feeding America, direct marketing revenue more than tripled, due in part to her initiation of such enhancements as new donor management software, web donations, a donor newsletter, a monthly giving club, and telemarketing efforts. Prior to her work at Feeding America, Terri was the Promotions Director for Prevent Blindness Indiana, an eye health and safety organization. Terri began her non-profit career running programs for children at Gleaners Food Bank of Indiana, an affiliate of Feeding America. Terri holds an undergraduate degree from Ohio University and a master's degree in Public Affairs with a concentration in nonprofit management from Indiana University. She moved to Phoenix six years ago from a small town in Downeast Maine. Her personal interests include music, reading, making cheese, and creating things out of recycled felt.



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Day 2 Speakers – August 22, 2019



Session Date: Aug 22 **Session Time:** Breakout PM1 – 1:00-2:15pm

Title: Stress, Trauma, and the Trauma-Informed Approach

Level: Beginner

Speaker: Claire Louge - Training Director, Prevent Child Abuse Arizona



Description: How does stress negatively impact your life, work, and relationships? This workshop will delve into the body's natural response to stress, and use this as a lens for understanding the impact of trauma on human thinking and behavior. Participants will learn simple stress-reduction techniques they can use anywhere, and learn how to apply the trauma-informed approach to their work with people.

Learning Objectives: Participants will learn why human beings experience negative consequences to stress by reviewing the functions of the Parasympathetic and Sympathetic Nervous Systems, and the thinking and behaviors that result from the activation of these systems. Participants will learn the relationship between stress and human performance, why their own ability to regulate their stress is so critical to being a helping professional (or person), and will learn several simple techniques to regulate their stress. Participants will learn actionable ways that they can apply the trauma-informed approach and promote positive change in their lives and the lives of others.

Speaker Bio: Claire Louge is the Training Director of Prevent Child Abuse Arizona, a statewide non-profit organization dedicated to preventing child maltreatment before it happens, and helping those who have experienced childhood trauma heal. Claire obtained her Bachelor's degree in Human Development from Cornell University and her Masters of Education in Human Relations from Northern Arizona University. Claire is also a certified Trauma Support Specialist through the Arizona Trauma Institute and certified by the National Alliance of Children's Trust and Prevention Funds to teach the Strengthening Families®, Protective Factors Framework. She is also an AmeriCorps VISTA alumnus. Claire regularly offers workshops and keynote addresses at conferences throughout Arizona.



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Day 2 Speakers – August 22, 2019



Session Date: Aug 22 **Session Time:** Breakout PM1 – 1:00-2:15pm

Title: ROI & True Sustainability: Moving Beyond the 3 G's (Golf, Galas, and Giveaways)

Level: Intermediate

Speaker: Tom Ralser - Principalm Convergent Nonprofit Solutions

Description: This session will focus on the transformational process used to move organizations from a charity mindset to one of sustainable investment. Nonprofit sustainability is not about writing a better grant, or finding that one product or service for which you can charge a fee. It's about delivering outcomes and impact that people value in order to make their community a better place to live.

Learning Objectives:

- Understand donors vs. investor difference
- Identify their most fundable outcomes
- Ideas on clearly communicating impact



Speaker Bio: Tom has worked with organizations of all kinds, from Chambers of Commerce to religious organizations, national museums to rural health networks, and local youth organizations to international research institutes. He pioneered the concept of applying return on investment (ROI) principles to nonprofit fundraising, and fundraisers have described his work as the “œsilver bullet” that justifies larger investments in nonprofit organizations. Hundreds of organizations have utilized Tom’s sustainability planning techniques to ensure they can thrive in a tight money environment. He holds the Chartered Financial Analyst (CFA) designation, which provides the framework for his Investment-Driven Model of fundraising, and led to the development of the Organizational Value Proposition®, which is widely used by corporations, foundations, and individuals as confirmation that the nonprofits in which they invest are truly delivering outcomes with values. His specialty of utilizing for-profit concepts and methods in the nonprofit world has helped nonprofits raise over an estimated \$1.6 billion in the 25 years he has worked with them. Tom is a frequent and highly acclaimed speaker, addressing topics about attracting new funders, outcome-based sustainability planning, and delivering value to investors.



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Day 2 Speakers – August 22, 2019



Session Date: Aug 22 **Session Time:** Breakout PM1 – 1:00-2:15pm

Title: The Road to 100% Digital Marketing

Level: Beginner

Speaker: Todd Vigil - Chief Marketing Officer, The Phoenix Symphony

Description: The Phoenix Symphony, has allocated 100% of their single ticket advertising budget to digital for the 2017-2018 and 2018-2109 seasons. In this session, you'll learn about the company's digital evolution, and see how the Symphony used data and experimentation to arrive at this progressive budget. Discover how this real life case study is playing out with \$5+ million in annual ticket sales on the line ""hint: record breaking results. After this session, you'll be able to: - Implement an iterative and strategic approach to increasing your digital advertising -Evaluate how to set, measure and implement key KPI's to prove, justify and communicate your progress -Double down what marketing efforts are working and discontinue or scale back efforts that are not -Prove or disprove paradigms in your industry using data (e.g. older audiences don't use social media)

Learning Objectives:

Speaker Bio: The Phoenix Symphony's "Maestro of Marketing" or Chief Marketing Officer, Todd Vigil oversees more than \$7 million dollars in ticket sales, subscriptions and ancillary revenue as well as the customer service and database team for Arizona's largest performing arts organization. During his tenure with The Phoenix Symphony, overall earned revenue has seen an impressive 145% growth led by multiple years of 20%+ single ticket sales increase and a reversal of subscription churn with a 14% increase, defying orchestral industry norms. With an aversion to all things traditional, Todd has led the shift in strategy and a significant investment in digital marketing, database utilization and dynamic pricing to maximize sales and marketing investments. Previous positions included running the Retail and Uniform Operations for US Airways at their headquarters in Tempe, AZ as well as numerous management roles for Target Stores. Todd received dual bachelors of sciences degrees in Marketing and Management with a minor in communications from Arizona State University. Actively involved in the local community, Todd has been a founding member of Phoenix Suns Charities 88 and Camp Get A Wella. He is a past Board member for Valley Youth Theatre, member of Valley Leadership Class 38 and recognized as a 2017 Phoenix Business Journal 40 Under 40 recipient. Frequently invited to speak at arts and digital marketing conferences throughout North America, Todd is also an instructor for Arizona State University's Lodestar NonProfit Management Institute. A resident of Scottsdale, AZ, Todd loves to enjoy the Arizona outdoors, a good book or podcast and has strong passion for exploring the world through international travel.



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Day 2 Speakers – August 22, 2019

Session Date: Aug 22 **Session Time:** Breakout PM1 – 1:00-2:15pm

Title: How to Master Media Interviews

Level: Beginner

Speaker: Keith Yaskin – President, The Flip Side Communications LLC

Description: Are you prepared for a challenging media interview? What about questions from donors, board members or volunteers? Watch former investigative television reporter Keith Yaskin, winner of three Emmys and three first place Associated Press awards, interview a member of the audience on camera and put him or her to the challenge on camera and under the lights. This also improves presentations. Then you, the audience, will help critique how well one of your own handled the interview in the spotlight. This session will teach you how to better tackle tough questions from traditional and social media, donors, board members and volunteers.



Learning Objectives:

Outcomes include:

- The importance of providing stories and examples
- Handling tough and unexpected questions
- Saying soundbites with substance
- Body language and what to wear
- Speaking passionately

Speaker Bio: Keith Yaskin is president of The Flip Side Communications LLC, a media company that helps companies tell their stories through video production, public relations, media training and employee communications. Before joining The Flip Side in 2011, Keith was an award-winning TV reporter for 17 years, primarily as an investigative journalist. Keith turned his passion for journalism and helping people into working with companies to effectively tell their stories from the inside out. As a reporter, Keith covered everything from government to business to education. He has covered hurricanes and space trips to Mars and interviewed countless CEOs, public figures and celebrities such as Charlton Heston and B.B. King. Keith spent most of his time as an investigative journalist and special projects reporter working on longer format stories. His achievements include: - Three-Time Emmy Award Winner - Three First Place Associated Press Awards - Arizona's TV Reporter of the Year, Associated Press - Gary Cummins Memorial Award, Top Broadcast Student, Northwestern University Keith frequently speaks to organizations on topics such as preparing for media interviews, navigating crises and telling your story through video. He has spoken to the Greater Phoenix Chamber of Commerce, Better Business Bureau, Arizona State University, International Association of Business Communicators, Public Relations Society of America, Business Wire, International Association of Venue Managers, Arizona Prosecuting Attorneys' Advisory Council, Kiwanis Club, Vistage International and SCORE. Keith received his B.S. in Journalism from Northwestern University's Medill School of Journalism.



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Day 2 Speakers – August 22, 2019

Session Date: Aug 22 **Session Time:** Breakout PM2 – 2:30-3:45pm

Title: C-Suite Discussion & Panel

Level: Intermediate

Moderator: Michael Barry – CEO, ONE – Organization of Nonprofit Executives

Panelists: Tom Egan - Foundation for Senior Living, Torri Taj - Child Crisis Arizona

Description:

Learning Objectives:

Speaker Bio: Michael Barry was appointed as Executive Director of ONE in March of 2018 and is the first individual to hold this position. Previously, he worked as Director of Business Development for Experience Matters, where he directed a team responsible for placing individuals with a lifetime of experience in nonprofits who could directly benefit from that experience. Prior to that he was both an Encore Fellow and a consultant to the American Lung Association in Arizona. Michael spent the majority of his career in the financial services sector, retiring from American Express in 2012 as Vice President of Business Development Strategy for the Corporate Services division.



Torrie Taj is a passionate and dedicated professional with more than 26 years in nonprofit leadership and philanthropy. Driven by meaningful work, she has dedicated her professional life to bettering the community through strategic partnerships and connecting resources to those in need. As CEO of Child Crisis Arizona (CCA), Torrie provides support and leadership to talented staff to break the cycle of child abuse and neglect, creating strong families and safe kids. Torrie started her career in the non-profit sector as a volunteer in 1991 and worked her way up, overseeing a variety of human-service programs before heading to lead CCA in 2015. Torrie encourages all her staff to give back through volunteer work in the community. Leading by example, Torrie enthusiastically serves on the Board of Association of Fundraising Professionals, is a current volunteer with Big Brothers Big Sisters, and teaches at ASU, her alma mater . . . Go Devils! For fun, Torrie loves spending time with her three children, enjoys gardening, and *loves, loves, loves* to travel!



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