

NPI 7th Annual Summit

May 18, 2015
Campbell's Resort
Chelan, WA



PROGRAM AGENDA



ICICLE FUND

ABOUT

NONPROFIT PRACTICES INSTITUTE

The Nonprofit Practices Institute (NPI) was established to provide capacity-building and professional development opportunities for nonprofit organizations across North Central Washington. In partnership with the Icicle Fund, NPI offers trainings, workshops, seminars, and other learning and networking opportunities tailored specifically to the needs of our local nonprofits. We believe that strengthening nonprofits to build capacity for long term sustainability helps to achieve our mission to **grow, protect, and connect charitable gifts in support of strong communities.**

Important Dates and Events

June 22 - Board Governance | Presented by: Secretary of State's Office of Charities Division

Presented by the Secretary of State's Office of Charities Division, this workshop will cover the various responsibilities and roles of board governance. This includes fiduciary responsibilities, maintaining nonprofit status, renewal, taxes, and more. An agent from the Gambling Commission will talk about laws for operating raffles, bingos, and other games of chance for fundraising efforts.

July 1 - Regional Impact Grant Opens | Deadline September 1

This year we are excited to announce a new strategy for nonprofit funding opportunities. Historically, the RIG program awarded up to \$5,000 to support nonprofit programs and initiatives. In effort to create a bigger impact and in response to grantee surveys, we have removed the funding cap. You'll learn more about the new program during the summit from our Director of Community Philanthropy, Denise Sorom.

July 1 - Helping Hands Grant Opens | Rolling Deadline

Helping Hands is a new grant program open to nonprofit organizations to support unexpected needs or special funding opportunities where a small investment could make a big difference. The grant is open year-round, with awards disbursed every other month.

October 7 and 8 - Collective Impact Workshop | Facilitator: Rick Anderson, Washington Nonprofits

The fall workshop will further introduce the Collective Impact framework and provide specific direction for how groups can collaborate to address complex social issues facing their communities.

October 14 and 15 - Board Celebration Dinners | Special Guest: Nancy Long, 501 Commons










Hosted at Sleeping Lady Resort and Sun Mountain Lodge, these complimentary dinners are for volunteer board members across the region to honor and celebrate their commitment and dedication to improving communities.

Stay Connected!

- » **Join our Mailing List** - This is the primary method of communication from the Community Foundation about trainings, events, grant news and information. Visit www.cfncw.org and click on "Join Mailing List"
- » **Join the NCW Nonprofits Listserv** - The listserv is a private email group that consists of your nonprofit peers in NCW. By invitation only, this listserv allows you to email an entire group through one address to share resources and information, ask questions, and seek advice. Email jennifer@cfncw.org to join.
- » **Like us on Facebook** - Like us to join the conversation and have a more personal connection to CFNCW. News releases, special photos, and at-the-moment updates. www.facebook.com/cfncw
- » **Follow us on Twitter** - do you tweet? Follow us [@cfncw](https://twitter.com/cfncw) and get the latest news from CFNCW.

PROGRAM

AGENDA

8:00 AM - 12:15 PM	REGISTRATION	Foyer
	Welcome & Overview	Ballroom
	Changes to Regional Impact Grant Program at CFNCW	Ballroom
	 KEYNOTE: Non-profits are Yesterday. Social Enterprises are Today	Ballroom
	Lunch and Networking Activity	Ballroom
12:15 PM - 1:15 PM	SESSION 1	
	 Cultural Competency in the Workforce and in Life	Stehekin A
	 Moneyball for Nonprofits: Getting Your Strategic Plan to Home Plate Using Data	Stehekin B
	 Computing in the Cloud: Is your small organization utilizing “the Cloud” to its full potential?	East/West
1:30 PM - 2:30 PM	SESSION 2	
	 Dashboard Care and Feeding: How to Tame and Manage This All-Powerful Management Animal for the Great Good of Your Organization	Stehekin A
	 Ready, Willing, and Able: Growing a Healthy Organization for the Long Haul	Stehekin B
	Beyond Consent Agendas: Planning and Chairing Effective Board Meetings	East/West
2:45 PM - 3:45 PM	SESSION 2	
	 Reaching Your Target Audience for Maximum Impact	Stehekin A
	 Collective Impact: A Strategy for Solving the Unsolvable	Stehekin B
	 Estate Planning 101/201: What Do Your Donors Need to Know?	East/West



Sessions marked with the box icon indicate more theory-based content



Sessions marked with the gear icon indicate more tools-driven content

SESSION

DESCRIPTIONS

KEYNOTE: Non-profits are Yesterday. Social Enterprises are Today

Donald Summers | Altruist Partners

Today's most exciting, high-achieving non-profits don't even think of themselves as "non-profit." They have adopted a new, more powerful mindset that, along with a simple, robust set of management tools, drives them to unprecedented levels of revenue, impact, and mission fulfillment. Attendees will hear a complete overview and leave with simple templates they can use to drive their own organizational transformation and acceleration.

Cultural Competency in the Workforce and Life

Jesus Hernandez | Community Choice Health and Education Institute

There are numerous aspects of cultural competency that can give your business an edge when service new populations or business sectors. For NCW, understanding the Latino community better, the diversity within it and the values that drive their behavior and decisions can be key to effective "engagement" and establishing meaningful relationships with multiple mutual benefits. We are really more alike than different...but it's comfort level that makes the difference. This session will provide helpful insights and practical ideas to implement.

Moneyball for Nonprofits: Getting Your Strategic Plan to Home Plate Using Data

Nathan Brown, Ph.D. | TrueBearing

Moneyball is the story of a ragtag baseball team that found itself unable to compete with big teams in terms of talent or finances--so they used the predictive power of carefully selected data to chart a startling and successful new path. The moneyball approach to strategic planning has come to the world of nonprofits. This workshop offers a practical understanding of how you can revitalize your nonprofit's strategic planning through the innovative use of evaluation data. Drawing on real-world examples and practical tools such as the free online Decisional Strengths Index (DSI), this workshop will offer insights that you can put to work right away with your own team.

This is a standalone workshop; however, it is designed as a companion to Ready, Willing and Able: Growing a Healthy Organization for the Long Haul

"The Cloud": Best Technology Practices for Nonprofits

Martin Straub | SimplePower IT

With tight budgets, competing priorities, and confusing options, many nonprofits overlook technology planning or choose to ignore it altogether until it is too late! In this session you'll learn more about the latest developments in "the cloud" and ideas for how to make smart, budget-friendly technology decisions. Come prepared with your questions and ready to share lessons learned from experiences at your organization.

Dashboard Care and Feeding: How to Tame and Manage This All-Powerful Management Animal for the Great Good of Your Organization

Donald Summers | Altruist

Non-profits are now discovering the governance, management and fundraising power of the dashboard. This seminar will explain what they are, what goes in them, how to create them, and how to use them to make everyone's life in your organization a lot better and happier.

SESSION Descriptions

Ready, Willing and Able: Growing a Healthy Organization for the Long Haul

Nathan Brown, Ph.D. | TrueBearing

Nonprofits today face a myriad of challenges and opportunities, and in the midst of meeting those demands, it is easy to lose track of the care and feeding of your most valuable assets: the people who make up your organization, and the culture they build in their work together. This workshop offers an opportunity to take stock of the health of your organization: its culture, its norms, and the capacity of its members for collaboration, flexible problem-solving, and quality decision making. Drawing on sound research in organizational development as well as identified best leadership practices that promote long-term organizational success, this workshop offers useful insights and tools for the leader seeking to build a team with staying power.

This is a standalone workshop; however, it is designed as a companion to Moneyball for Nonprofits: Getting your Strategic Plan to Home Plate with Data.

Beyond Consent Agendas: Planning and Chairing Effective Board Meetings

Katie Kavanaugh Pauly | Community Foundation of NCW

Effective board meetings are an essential component of successful nonprofit organizations. In this session you will learn about effective strategies for planning and chairing board meeting, including: collaboration between Executive Director and Board Chair/President, agenda development, time management, important dialogue, and more. There will be time after this session for board members in the room to connect individually.

Reaching Your Target Audience for Maximum Impact

Jennifer Korfiatis | Marketing Consultant

Non-profit organizations need to communicate with customers, donors, members, and stakeholders to share information, elicit support, and explain value. This session will provide an overview of strategic methods designed to share your message with select audiences.

Collective Impact: A Strategy for Solving the Unsolvable

Rick Anderson | Washington Nonprofits & Denise Sorom | Community Foundation of NCW

Rick Anderson, Director of Public Policy for Washington Nonprofits, and Denise Sorom, Director of Community Philanthropy for the Community Foundation of North Central Washington, will provide an overview of Collective Impact, a new paradigm of collaboration for tackling complex social and environmental challenges. Attendees interested in “moving the needle” on a major issue facing their community (graduation rates, early learning, homelessness, or hunger for example) will learn about a new model for effectively partnering with other nonprofits and public agencies to make a difference. Rick will return to NPI in the fall to conduct an in-depth workshop on Collective Impact for interested parties.

Estate Planning: What Do Your Donors Need to Know?

Russel J. Speidel | Speidel Law Firm

Brand strategy is the process of identifying your most compelling attributes and combining them into a unique promise. Conveying who you are, what you do, and why it matters is easy to do. Or is it? In this workshop, participants will learn practical methods to evaluate, understand and refine a competitive advantage – bringing brand in focus to impact reputation and revenue.

SPEAKERS

BIOGRAPHIES



Rick Anderson | Public Policy Director, Washington Nonprofits

Rick works closely with the executive branch, state legislators, and nonprofit leaders on a wide variety of topics. Rick has a broad background in science, policy, politics, and project management. Past work experience includes 11 years working for the Washington State Legislature and 15 years working as a consultant for public, private, and nonprofit organizations. Rick was twice awarded the prestigious “Pathfinder” for innovation at a national consulting firm. He has presented at statewide, regional, and national conferences on collaboration, process improvement, and performance management. Rick is a Washington state native, about to celebrate his 30th wedding anniversary, and has three wonderful adult children.



Nathan Brown, Ph.D. | Director of Evaluation Services, TrueBearing

Nathan is a psychologist who has extensive experience serving nonprofits and their leaders in a variety of roles: as a start-up leader, executive director, board member, consultant, and psychotherapist. Dr. Brown’s background in academia, applied community psychology and psychotherapy informs his work with organizations and their leaders that are navigating the dangers and opportunities in today’s nonprofit world. He is passionate about unleashing practical, evidence-based methods in support of strategic planning and evaluation as well as staff development and other core responsibilities of nonprofit leadership. Dr. Brown received his doctorate from Fuller Graduate School of Psychology in California. In addition to his clinical practice, he currently serves as Director of Evaluation Services for TrueBearing, a Seattle-based planning and evaluation firm dedicated to serving nonprofits in the Pacific Northwest since 2004.



Jesus Hernandez | CEO, Community Choice Health & Education Institute

Jesus has led Community Choice with extensive expertise and experience in start up and implementation of programs including outreach and education experience with disadvantaged populations. Jesus completed a Bachelor degree from Washington State University in Business Administration and a Masters in Public Administration from University of Washington. He has diverse experience in administration of programs in workforce development for people with disabilities and minorities, small business development, youth leadership programs, strategic planning, policy development, public education and workforce investment.



Jennifer Korfiatis, MBA | Marketing Consultant

Jennifer has a proven track record of helping companies and non-profit organizations create comprehensive and solid business and marketing plans and research-based campaigns that are effective and bring results. With a 20-year background in marketing, Jennifer operates as an independent contractor, while enjoying the ability and freedom to forge close relationships with select clients. Jennifer serves as an Adjunct Professor at Wenatchee Valley College where she teaches business, entrepreneurship, and marketing classes. She also spent eight years as the Administrator of the non-profit North Central Washington Economic Development District.

SPEAKERS

BIOGRAPHIES



Katie Kavanaugh Pauly | Board Chair, Community Foundation of NCW

Katie has an extensive career of community volunteerism and nonprofit leadership in the Wenatchee Valley. She currently serves as Chair of the Board of Trustees at the Community Foundation of NCW and has previously served chair positions for the Wenatchee Valley YMCA, Wenatchee High School Booster Club, and Columbia Elementary PTA. She is also a member of the Whitman College Board of Overseers. Katie values well-run meetings, effective leadership, and mission-driven work that challenges and engages board members.



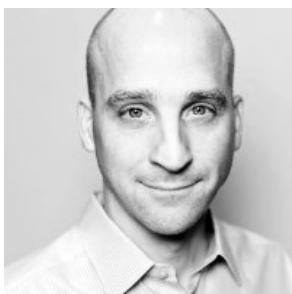
Russ Speidel | Attorney, Speidel Law Firm

Russell J. Speidel has emphasized estate planning and related fields in his law practice for over 35 years. He is a Fellow of the American College of Trust and Estate Counsel (ACTEC), and has been named a “Super Lawyer” by Washington Law and Politics annually since 2008. He is a past president of the Chelan-Douglas County Bar Association. Mr. Speidel serves as attorney for several nonprofit corporations, including the Community Foundation of North Central Washington. He has also served on many non-profit boards of directors, including the Wenatchee School Board. Currently, Mr. Speidel serves on the state-wide Board of Directors of the Northwest Justice Project and the local Advisory Board of the Wenatchee Corps of The Salvation Army.



Martin Straub | Owner, SimplePower IT

Martin has nearly 20 years of experience implementing technology solutions. In 2001, he migrated from a corporate career and fast-paced Puget Sound environment to a much more satisfying personal and professional lifestyle in North Central Washington. For the first 12 years in Wenatchee he served as the Technology Director for Cordell, Neher & Co., PLLC. After seeing many local organizations struggle to make wise technology decisions, in 2013 he started SimplePowerIT focused on delivering frustration-free and cloud-based technology solutions to NCW businesses and nonprofits. Martin has served in Executive Positions on the Boards of numerous regional nonprofits, including the Greater Wenatchee Area Technology Alliance (GWATA), Mission Vista, Wenatchee Outdoors, and Wenatchee River Institute.



Donald Summers | Owner, Altruist

Donald Summers is a social entrepreneur, speaker, author and management consultant with a long track record of helping organizations achieve dramatic increases in organizational effectiveness and growth. A graduate of Middlebury and Harvard, he is currently Director of Altruist Partners, a non-profit management consultancy he founded in 2006.

CAMPBELL'S

LAKE CHELAN'S WATERFRONT RESORT



FLOOR 2



FLOOR 1