



Sarkeys Southwest Regional Leadership Forum Schedule

9:00 – 10:15am

Monday, November 9

Multi - Generational Listening Panel

Facilitator: Susan Hardy Brooks

Panelist: Denise Garner – Boomer; Daniel Hintz – Gen X; Becky Taylor – millennial; Pat Potts - traditionalist

So you think you know who you're talking to with your newsletters, donor requests, client/customer communications...and your staff? What are they thinking? How do they want to get their information? This Multi-Generational Panel will create understanding and shed new light on targeted communications that work.

Digital Marketing

Mike Koehler, Smirk Media

What does it take to stand out in the crowded world of social media? For a non-profit organization it means telling your story - on the right platforms, in the right way in front of the right audience. Developing a strategy about the content you create, the money you spend and how you present yourself is key to success online.

Internal Controls for the Nonprofit

Monica Swink

You've heard it said that "Trust is not an Internal Control." So, what is an internal control? What processes should we have in place to ensure the integrity of our financial reporting systems and to make sure we can report our financial position correctly? We'll explore some recommended controls (and why they exist) and also look at acceptable methods of tweaking those controls to fit your work processes. Internal controls are vital in today's nonprofit environment and we'll explore how you can design and implement controls to reduce the risk of embezzlement and fraud.

Turning Data into Action

Kathy Taylor

Data is more accessible than ever. Everything from the scores we make on standardized exams to types of food we purchase in the grocery store is tracked. Computers have made it possible for even the smallest organization to collect data; however, turning that data into action can feel overwhelming. This is especially true for nonprofits that often have limited financial resources for investing in data management systems and do not feel they have the expertise needed.

Data collection and analysis does not have to be intimidating. In fact, it can be energizing. Imagine having the ability to clearly demonstrate the impact your agency is having on the community or identify opportunities for course correction quickly. Below are just a few of the ways you can use data to inform action.

- Identify challenges and develop an action plan for addressing them
- Align partner agencies for collective action
- Understand what is working and not working at the program and agency level
- Track agency progress toward community-wide goals
- Publicly highlight successes to increase community and stakeholder support

This session is designed to help take the intimidation out of data collection and help you identify the best use of data for your agency. I will share some insights, struggles, and successes Impact Tulsa has had in its journey to turn data into action.

Conflict Resolution

Wes Lane & David Prater

Back by popular demand. Hear how two respected community and political leaders walked down a path of forgiveness to change their relationship. At the center of it is their faith. Following a new path distinguishes them as true leaders and also led Wes to partner with other Christian business men and women to start an initiative called SALLT – Salt and Light Leadership Training. Hear a candid conversation about their journey and how they are working together to impact the common good of the city.

Coaching as a Supervisor

Janetta Cravens

The role of the supervisor is changing under new models for leadership that emphasize collaboration and problem-solving with a team. Understand how to harness the art of coaching to establish expectations with staff, cultivate the wisdom already present in your

team, and address underperforming employees. Participants will learn models for coaching, further develop listening and feedback skills, and refine techniques that get staff to establish focus and determine action.

10:30 – 10:45am
Monday, November 9

Multi - Generational Listening Session 2:

Susan Hardy Brooks

This is a follow-up working session to dissect your organization's target audiences and actually plan new strategies to strengthen your connections.

Unconventional Strategies: Creating a Network of Support:

Colleen Fitzgerald

Birds need two wings, and in a way--so do we. If we're going to fly and even soar as we do important work, then we need -- Wing One: Significant levels of self-awareness and, Wing Two: Dynamic connections with mentors and supporters.

Nonprofit Transitions & Succession Planning:

Ian Adair

It is time to change how we think about and approach succession planning. A succession plan should take into consideration more than just an exiting leader; it should encompass everything from developing a sustainable business model, to strengthening staff and board leadership, while also critically looking at all the core programs needed to support the organization's mission. This session will cover:

- Common anxiety's about succession planning and what SUCCESS should look like
- Shifting expectations and responsibilities of boards in favor of governance over fundraising
- The 4 stages of a good succession plan
- How to effectively manage relationships between the organization and its external stakeholders
- How, when and where to utilize an exiting CEO

Legal:

Jeri Toler

Our favorite nonprofit legal expert will cover:

- Bylaws – what goes in and what stays out
- Committees – duties and oversight
- Dealing with the rogue board member

Crisis Management – Embezzlement, Firings, and Other Program Snafus:

Facilitated by Stephanie Bice, Smirk New Media

When the unexpected happens, it can send an organization into a tailspin if all involved are not prepared. What do you do to “get ready” for a crisis? How can you handle financial, staffing, public image, rumors, program issues effectively to keep the organization moving forward? Experience, expertise and candor will shed light on these sensitive topics.

Building, Energizing and Evaluating Teams Through Organizational and System Change:

Mary Ingham

Iowa restructured the funding process for organizations providing domestic abuse and sexual assault services throughout the state. The shift was a proactive maneuver to ensure that high quality services would be available in every county throughout the state. This session will explore the challenges, accomplishments and systems needed to build and sustain a team through change, including:

- Honoring the wisdom of staff
- Communicating vision, strategy and implementation
- Understanding the importance of language
- Utilizing a holistic approach
- Redefining the employee evaluation process
- Developing a process to measure organizational change
- Learning from strategies that don't work

12:00 – 2:00pm – Lunch- Keynote Janine Driver
Monday, November 9th

2:15 – 3:00pm
Monday, November 9th

Creating Compelling Experience to Drive Mission and Create Value:

Daniel Hintz

Non-profits often use events to fundraise, yet the amount of energy and staff time can distract from either the mission or service and results in limited net overall gain. Daniel Hintz, Chief Experience Architect of the Velocity Group and former Executive Director of a nonprofit entity, will share his process to create alignment between mission, service and earned revenue that will help change the way you think about fundraising.

Internal Controls for your QuickBooks Accounting Systems

Monica Swink

QuickBooks is one of the accounting systems used by many nonprofit accounting professionals. And auditors typically don't like the fact that changes to the system (we call them corrections!) are so easy. So how do we set up procedures and policies to ensure the controls so important to our auditors? What are some ways to use the system to ensure that corrections really are corrections and not ways to hide fraud? We'll show you how to ensure that each user has their own user ID and password and how to run an audit trail report, how to void a check properly and a list of things to do and things to never do! Come hear how to make the QuickBooks environment more secure to produce financial reports that will satisfy you, your board and your auditor.

Rules of Engagement: Making Connections Last:

Dr. Froswa Booker-Drew

Most of us know the quote, "No man is an island, entire of itself; every man is a piece of the continent, a part of the main". The reality is that we all need relationships to make this happen in our personal and professional lives. As nonprofit professionals, it is critical to understand the power of your story in order to build authentic, high quality connections that matter. Learn key tips in building growth-fostering relationships that can make a difference as you build your network and social capital.

Legal:

Jeri Towler

Part Two of our favorite nonprofit legal expert covering:

- Statutory Protection – feeling warm and fuzzy during difficult times
- Policies – required and recommended

- Conflicts of Interest – how to protect your board members

What Exceptional Leaders Know:

Tracy Spears

Tracy identifies the most common mistakes made by leaders with adjustment strategies to overcome those challenges. She discusses how these leadership skills are enhanced through an understanding of personality temperament needs, strengths and motivators.

Learning Objectives:

- Specific skills of proven leadership
- How to develop your influence as a leader
- How to enhance your effectiveness as a leader
- Simple strategies leaders can use immediately for positive outcomes
- Most common mistakes made by leaders and how to overcome those challenges

Stories Worth Telling – Building a Culture of Change – Part 1 of 2:

Bridget Pooley & John Trybus

(This is a sequential 2 session workshop)

Storytelling, storytelling, storytelling! It seems that every type of social impact organization – from nonprofits to socially responsible businesses – is talking about the power of storytelling as a hot engagement strategy. And for good reason. Powerful stories have been proven to inspire donors, motivate consumers and engage a host of other audiences. Yet, actually creating stories of an organization’s impact and forming a culture of storytelling are not easy tasks. This hands-on, participatory session for all skill levels will introduce you to the applied research findings and useful resources from the Stories Worth Telling report, produced by Georgetown University’s renowned Center for Social Impact Communication (CSIC) and the Meyer Foundation. You’ll learn about the five essential building blocks of effective stories and how to create a culture of storytelling within your own organization. Get ready to roll-up your sleeves and think strategically about your organization’s stories and how to bring them to life for the world to see, hear and feel in order to drive emotional connections with those people you most want to reach.

3:45 – 5:00pm

Monday, November 9th

Power of Stakeholders in Fundraising:

Ian Adair

Description: Storytelling is one of the best ways to connect with donors and keep them excited about your mission and impact. Storytelling is most effective when utilizing two of an organization's greatest assets- it's Stakeholders and Champions. This session will help you reach your fundraising goals through utilizing storytelling, unlocking the power of stakeholders, and helping you find your organization's true champions! This session will cover:

- The "Influence Factor" of Stakeholders
- Best practices for identifying Champions
- The 3 "Super Powers" of Stakeholders
- 3 types of stories and how to amplify them
- Integrating storytelling into ALL of your fundraising efforts

The Small Nonprofit – An Open Forum:

Sandy Wright

The results from our Forum nonprofit survey yielded many requests to have sessions focused on smaller nonprofits (however you want to define that). Juggling personnel, duties, small or no development staff, burn out, high expectations, low budget, documenting results – whatever the joys, challenges, creativity, successes and issues are, bring them to this session and we'll discuss ideas, offer support and explore solutions. A variety of resources will be present to listen and brainstorm with you.

We will also offer an informal Monday Night “Salon” for small nonprofits to drop in as a continuation of this conversation.

From Bored to Board on Fire:

Tracy Spears

How do I get more interaction? Why won't some people volunteer? Are these people just resume building? What can we expect from Board Leadership (every member)? If you have ever asked yourself any of these questions and more, this session is for you. It will address why people serve on boards, how to actively engage your board, how to effectively delegate, and other “revolutionary” concepts. This session will take a fresh look at how leadership can influence the board and how you can lead your board to higher productivity. Tracy is a life time student of leadership, group dynamics and innovative ways to make teams perform at the highest possible level.

Collaborative Relationships 101:

Dr. Froswa Booker-Drew

We all know that funders love collaboration. They believe it makes sense when nonprofits work together and leverage their strengths to accomplish something neither organization could achieve on its own. In this workshop, you will discover the following:

- *Learn to use Asset Mapping to identify potential funding relationships*
- *Discover how to develop partnerships that facilitate collective impact toward social capital*
- *Examine factors towards successful collaboration*

The TARGET Approach to Grant Seeking:

Dana Schuler Drummond, Sharpshooter Communications

You don't have the time or resources to waste on a shotgun approach to grant seeking. Dana Schuler Drummond, owner of Sharpshooter Communications, will share the targeted approach to grant seeking she has honed over twenty-plus years of nonprofit experience. By the end of this session, you'll know how to:

- T - Tailor descriptions of your organization, projects and outcomes to appeal to funders;
- A - Acquire a list of potential funders;
- R - Research funders to determine what they are looking for;
- G - Grant write to make your proposal stand out;
- E - Expect realistic results from grant seeking;
- T - Tell grantors how much you appreciate their grant!

Stories Worth Telling – Building A Culture of Change – Part 2 of 2:

Bridget Pooley & John Trybus

(This is the second part of the sequential workshop)

Storytelling, storytelling, storytelling! It seems that every type of social impact organization – from nonprofits to socially responsible businesses – is talking about the power of storytelling as a hot engagement strategy. And for good reason. Powerful stories have been proven to inspire donors, motivate consumers and engage a host of other audiences. Yet, actually creating stories of an organization's impact and forming a culture of storytelling are not easy tasks. This hands-on, participatory session for all skill levels will introduce you to the applied research findings and useful resources from the Stories Worth Telling report, produced by Georgetown University's renowned Center for Social Impact Communication (CSIC) and the Meyer Foundation. You'll learn about the five essential building blocks of effective stories and how to create a culture of storytelling within your own organization. Get ready to roll-up your sleeves and think strategically about your organization's stories

and how to bring them to life for the world to see, hear and feel in order to drive emotional connections with those people you most want to reach.

8:30 – 10:00pm – Breakfast – Keynote Dan Pallotta
Tuesday, November 10th

10:30 – 11:45am
Tuesday, November 10th

Leadership:
Nathan Mellor

Coming Soon!

The Sustainability Formula- A Guide to Nonprofit Health:
Sandy Wright

Becoming a curious learning organization is critical to financial, program, staffing, leadership and funding distinction. Roll up your sleeves and complete a self-assessment on your all the elements that ensure your future. Leave the session with real tools to engage your whole organization in a realistic sustainability program.

Turning Empathy into Action with Design Thinking:
Kate Hanisian

During this session, Design Impact, a non-profit social innovation firm, will unlock the power of design thinking as it relates to driving innovation in the social sector. In a world of increasing complexity, non-profit leaders require new tools for solving complicated community issues. This hands-on, active session will not only explain design thinking, it will provide case studies of its power in the social sector and arm attendees with practical tools to take back to the field.

(This session will be repeated)

Crowdfunding 101:
Susan McPherson

Not the panacea we all hoped for, but if done correctly, Crowdfunding can be a huge support to burgeoning Nonprofit Organizations. Join Susan in a lively, practical and effective approach to this new tool.

Today or Tomorrow? Strategic Development Planning:

Lynnette Watts

In today's shifting financial environment, it is difficult to secure the resources your nonprofit needs to do its critical work every day and into the future. This session provides the tools and process to craft an effective development plan to sustain your organization's financial viability and mission impact.

The New Volunteer:

Daisy McNeil

Explore ideas about recruiting, retaining, and recognizing your volunteers in today's ever-changing and challenging world. What will speak to the different generations and how can we honor their needs. Engage in discussion and best practices as we explore the opportunity to Rethink Everything!

**11:45am – 1:45pm – Lunch – Keynote - Jeanette Walls
Tuesday, November 10th**

**2:00 – 3:15pm
Tuesday, November 10th**

Multipliers – Unblocking Discretionary Efforts of your Workforce:

Rob DeLange

Non-profit enterprises often face challenges with budget or headcount to fulfill the mission of the organization. Your success as a leader will depend in large part on your ability to *fully* access the intelligence of your staff and to unlock the discretionary efforts of others beyond the organization to support your cause.

Come learn the secrets of the best leaders in the world-- the leaders that Liz Wiseman refers to as "Intelligence Multipliers" in her WSJ bestselling book *Multipliers: How the Best Leaders Make Everyone Smarter*. Multipliers don't get just a little more from their teams-- they get vastly more-- often two or three times the contributions of the workforce compared to most leaders.

You'll walk away with two practical experiments to take back to your organization so you can more deeply utilize the resources you already have. You'll discover the hidden genius that surrounds you and bring out the best contributions of others so you can see the benefits of the 2X effect.

The Pain and Plusses of Outcome Measurement:

Facilitated by Jeanne Gillert

Panel: Miki Farris, Alana Hughes, Cline Williams and Denise Caudill

Outcomes or Outputs? What is everyone talking about and why is it important? Or is it? Join our panelists for a lively discussion on this critical topic for the future success of nonprofits.

What is your Brand and Why is that Important?

Susan McPherson

Did you know there are over 1.5 million nonprofits in the U.S. today? That means you are competing with each and every one of them for dollars, mind-share, volunteers, media coverage and social media love. What is an organization to do? In this interactive session, Susan McPherson will lead you through the best tips and tricks to help you stand-out amongst the noise by powering up your brand and creating buzz and awareness.

Capital Campaigns:

Ian Adair

Small and midsize nonprofits have dreams of new buildings just like larger organizations. Before building something sustainable certain action steps must be taken to give your organization the best chance for a successful capital campaign. A capital campaign is a difficult task for any organization, but for nonprofits with an operating budget under \$2 million it can be life threatening. Organizations must go through the process of determining how their services are valued, brand and reputation are perceived, and if their mission is well-known. This session will cover:

- The most common challenges of a capital campaign
- The 7 important goals of a feasibility planning study
- Two important conclusions of a feasibility study
- How long should your campaign last and when should you start?
- Your capital campaign committee- Who should be on it and Why?

Management vs. Governance - whose job is it, anyway?

Susan Frantz

This session will explore the roles and responsibilities of the chief executive and board members. Where do they overlap? Where do they diverge? Who's in charge of what? What

kind of relationship should exist: Team with well-defined roles? Equal partners? Boss/Employee? Let's share our thoughts and perhaps explore new ideas.

Seven Strategic Blunders: Why Entrepreneurial Nonprofits Stumble – Part 1 of 2:

Jerr Boschee

Work with your own social enterprise concept, explore the early stages of development, leave with a field guide to best practices and understand how to avoid common pitfalls. This is a two back-to-back session workshop.

3:30 – 4:45pm

Tuesday, November 10th

Rookie Smarts: How to Escape the Experience Trap & Revitalize your Work:

Rob Delange

In this age of rapid change when the shelf life of information is getting shorter and shorter, it becomes increasingly important for leaders to recognize those times when the best outcomes can be realized by stepping away from their knowledge and experience.

Come learn what the most agile and successful people do to rekindle their fire for learning and how a shift to your "rookie" mindset in the right moments can enable you to achieve superior results-- not only for you but for your entire workforce.

Tools for Outcome Measurement – Session 2 Follow up

Jeanne Gillert with expert coaches to work with

After hearing the conversation about Outcome Measurement, what do you do? This is a hands-on session to get your questions answered and a set of strategies launched.

The Partnership

Marnie Taylor & Miki Farris

In combining resources, a partnership's whole becomes greater than its individual parts. The partnership between the board chair and the executive director has the capacity to transform an organization and move forward. Come learn best practices for each role and how to adapt to one another, set expectations and boundaries, as well as communicate with one another.

Who should attend:
Board leaders/chairs
Executive Directors

Turning Empathy into Action with Design Thinking:

Kate Hanisian

During this session, Design Impact, a non-profit social innovation firm, will unlock the power of design thinking as it relates to driving innovation in the social sector. In a world of increasing complexity, non-profit leaders require new tools for solving complicated community issues. This hands-on, active session will not only explain design thinking, it will provide case studies of its power in the social sector and arm attendees with practical tools to take back to the field.

Websites for Leaders: Inspiring Action to Grow Your Community

Eric Huber

As every organization knows, it's not enough to just have a website where you can send people to signup, learn more, or donate. You've got to get people engaged and inspire them into action. In this session, we'll focus on key design elements to 'move' people to become part of something bigger than themselves and help fuel your organization to the next level.

Seven Strategic Blunders: Why Entrepreneurial Nonprofits Stumble – Part 2 of 2:

Jerr Boschee

Work with your own social enterprise concept, explore the early stages of development, leave with a field guide to best practices and understand how to avoid common pitfalls. This is the 2nd part of the back to back sessions.