

Full Day Conference Schedule

Date: Wednesday, September 20
Time: 7:30am to 3:30pm
Venue: Desert Willow Conference Center
Address: 4340 E Cotton Center Blvd, Phoenix, AZ 85040

7:30 – 9:00am	Registration, Breakfast, Exhibitor Booths & Networking
9:00 – 9:45am	Welcome & Opening Plenary Welcome
	➡➡➡ Keynote - “Strong Nonprofits. Stronger Communities.” Dr. Susan Kenny Stevens, Founder, Nonprofit Lifecycles Institute
9:45 – 9:55am	Break
9:55am-11:25am	Morning Breakout Sessions 1 – Lifecycles of Nonprofits 2 – Board Recruitment, Building a True Board 3 – Inspiring Philanthropy in our Local Community 4 – Advocacy Roadmap: Making “Cents” of Advocacy 5 – Secrets to a Successful GuideStar Nonprofit Profile 6 – Starting Up A Strong Development Department 7 – Roundtable Discussion TBD
11:25 – 12:15pm	Lunch, Exhibitor Booths & Networking
12:15 – 1:00pm	General Session State of the Alliance - Kristen Merrifield, CAE, Chief Executive Officer
	➡➡➡ Keynote - “What’s the Story?: Articulating a New Narrative for the Nonprofit Sector” Jeff Moore, Chief Strategy Officer, Independent Sector
1:00-1:10pm	Break
1:10-2:40pm	Afternoon Breakout Sessions 1 – How to Crack the Devotion Code 2 – Resilient, Successful and Strong Nonprofits and the Necessary Mindset 3 – Leading through Change: Red Flags and Strategies to Strengthen Your Mission 4 – Stronger Boards. Stronger Nonprofits. 5 – Beyond the Bottom Line: Measuring the Social Impact of Arizona’s Nonprofit Sector 6 – Disrupting Your Brand Message for Mission-Centric Fundraising & Marketing 7 – “What’s the Story?” Roundtable Discussion Deeper Dive
2:40 – 2:50pm	Break
2:50 – 3:30pm	Wrap-Up & Closing Plenary Closing
	➡➡➡ Keynote - “Myth-busting the Overhead Myth”



Growing Stronger.

The 2017 Alliance of Arizona Nonprofits
Annual Conference September 20, 2017

Eva Nico, Senior Director of Programs, GuideStar



Susan Kenny Stevens
Founding CEO



Jeff Moore
Chief Strategy Officer



Eva Nico
Senior Director of
Programs



Dr. Susan Kenny Stevens, Nonprofit Lifecycles Institute -

Susan Kenny Stevens is a nationally recognized consultant and advisor to many local and national foundations. Her award-winning book, *Nonprofit Lifecycles* serves as the cornerstone for many capacity-building programs across the United States and Canada including the Piper Trust's ATLAS and AGILE programs. Dr. Stevens holds a Ph.D. in Organizational Behavior. In 2016, Susan founded the Nonprofit Lifecycles Institute which based here in Arizona. The Institute's motto is *Strong Nonprofits. Stronger Communities.*

Jeff Moore, Independent Sector -

Jeff Moore currently serves as chief strategy officer, supporting the Independent Sector's critical strategic visioning efforts as it guides the sector to meet the future needs of democratic society. He is a senior leader with broad experience in the nonprofit field, government, and industry. He most recently served in an executive role in the health-systems research field. Jeff has served as a senior advisor to the Secretary of Defense and as legislative director to Congressman Thomas J. Downey (NY). In each of his positions, he has built critical partnerships and alliances that have accelerated organizational and mission success. His leadership style—he was described by one of his former board members as being “the weaver of the cloth”—and career experiences create a unique foundation for advancing critical thinking, strategic development, and organizational performance. Jeff considers his Distinguished Civilian Service Award, presented in 1998 by Secretary of Defense William Cohen, to be among his



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greatest career achievements. Cohen honored Moore at the end of his tenure in the Clinton administration for his contributions to the nation's security and his unique ability to build bridges between U.S. government agencies, the U.S. private sector, and foreign governments.

Eva Nico, GuideStar -

Eva Nico is the Senior Director of Nonprofit Programs at GuideStar - an organization dedicated to providing better access to better information for a better world. Eva is GuideStar's in-house expert on nonprofit strategy and evaluation issues. Eva's goals are to help nonprofits share their full story using the GuideStar Profile and to use the information to make better decisions. In her role, Eva also advocates for greater transparency and use of data among nonprofits and for solutions to address the "The Overhead Myth". Eva has over 12 years of experience in strategic planning and evaluation in the social sector, having worked on complex social issues in health, education, and community vitality at FSG Social Impact Advisors and McKinsey & Company. Eva has a B.S. in Physics from the University of Notre Dame and a Ph.D. in Physics from Oxford University.

Full Day Conference Breakout Session Descriptions

MORNING BREAKOUT SESSIONS



AM1 – Lifecycles of Nonprofits

Presenter: Dr. Susan Kenny Stevens, Nonprofit Lifecycles Institute

This session, based on the speaker's widely popular book, *Nonprofit Lifecycles*, will provide a practical way to think about strengthening your organizational capacity, no matter your organization's age or size. Using seven lifecycle stages to describe the predictable growing pains nonprofits experience at each stage of development, this session will present concepts especially relevant to board members, CEOs, staff and development directors. Come and learn how to self-assess your organization's management, governance, financial resources, and administrative structures as the vital support systems for your important mission and programs.



AM2 – Board Recruitment, Building a True Board

Presenter: Bruce Weber, Greater Boards

Building a strong board requires careful thought and planning. Identifying candidates that have a linkage to your organizations mission and align with their personal values is critical. Mapping an individual's skillsets and talents is extremely important in enabling a successful, ongoing recruiting plan. In this session, we will explore methods to evaluate your current board and identify how recruiting for purpose, not position is so critical for success. This interactive session will address board assessment, candidate cultivation, interview processes, engagement, and ongoing evaluation.





AM3 – Inspiring Philanthropy in our Local Community

Presenter: Marissa Nuvayestewa, The Hopi Foundation

In this workshop you will learn the advantages of developing a fundraising culture and how that has allowed us to grow and challenged our staff, volunteers, and non-profit community to rally around inspiring philanthropy in our local community. While our strategies have varied from year to year, we stick to one of our shared goals of "friend" raising. Every year we have been able to increase our first time donors through the Arizona Gives Day Campaign. This workshop will cover the gains that has resulted from participating in the campaign, how we leverage resources, and the common challenges we share with rural nonprofits. Most importantly, how we to continue to support one another to grow stronger as the nonprofit sector in our local community.



AM4 – Advocacy Roadmap: Making “Cents” of Advocacy

Presenter: David Martinez III, St. Mary’s Food Bank Alliance

So you know the dos and don'ts of nonprofit advocacy but do you know how to create an advocacy plan that shows the correlation to fundraising and your organization's bottom line? You'll learn you can't afford not to advocate. These days, it's more important than ever for nonprofits to speak up about the amazing work they're doing. Advocating for your cause, your programs, and the people you serve is vital for long-term success. But it takes more than a great message and good intentions. Successful nonprofit advocacy also takes planning. In this fast-paced session, you'll learn the basics of how to develop an actionable advocacy plan to help take your organization to the next level. Don't you owe it to yourself, your nonprofit, and the causes you care about to effectively demonstrate the impact you make in our community? Enhance your voice with an advocacy plan that does just that.



AM5 – Secrets to a Successful GuideStar Nonprofit Profile

Presenter: Eva Nico, GuideStar

You're a fixture in your local community but want to grow your visibility online. Where should you start? Each year, millions of donors, funders and stakeholders turn to GuideStar to learn more about the organizations they choose to support. In this session, you'll learn the secrets to creating a successful and complete GuideStar profile you'll want the public to see.



AM6 – Starting Up A Strong Development Department

Presenters: Jarrett Ransom and Jacquelyn Ahrenberg, Rayvan Consulting Group

As your nonprofit matures, the structure and management of fundraising becomes more critical. Is it time for your organization to establish a Development Department? Maybe it's time to retool your Development team? Jarrett Ransom, MBA and Jacquelyn Ahrenberg, CFRE talk about the steps your nonprofit needs to take before running into the process of operating a Development Department. From managing job expectations, job searches, donor databases to setting goals and measuring progress, there is a lot to do! The management of fundraising is central to an organization's success. Is your nonprofit set up to succeed with Development? Come and learn what key tools nonprofits must have in order to be successful.



AM7 – Roundtable Discussion TBD



AFTERNOON BREAKOUT SESSIONS



PM1 – How to Crack the Devotion Code

Presenter: Matt Lehrman, Audience Avenue LLC

What attracts a donor to your organization in the first place? What sustains that donor's interest over time? And why is it becoming increasingly difficult for non-profits to succeed at either? The competition for "belonging" has never been greater. Powered by social media, today, all sorts of companies and interests are competing with nonprofit causes to transform mere customers into deeply engaged communities. As a result, your important and noble mission is now in direct competition with the kind of fan devotion that supporters express for sports teams and for brands like Apple & Harley-Davidson. (When was the last time your most fervent fans tattooed your cause's logo on their bodies?)

Matt Lehrman provides insight into the rapidly evolving nature of supporter/donor relationships – as transactions, services, spectacles, and communities. He then shares 5 innovative strategies that nonprofits can (and should) deploy to gain and sustain their support. Spanning both digital and real-world relationship strategies, this session promises insights both practical and profound. What are you waiting for? If you're not diligently pursuing your supporters' deepest loyalty, someone else surely is.



PM2 – Resilient, Successful and Strong Nonprofits and the Necessary Mindset

Presenter: Carolyn Sechler, Sechler CPA PC

What are the traits of an Organization who hopes to become and maintain a self-sustaining stance? Becoming a successful social entrepreneur. Understanding "micro-cultures" and how they shape the character of our Organization and thus impact? Exploring collaborative transactions among nonprofits as a means of promoting sustainability and growth.



PM3 – Leading through Change: Red Flags and Strategies to Strengthen Your Mission

Presenter: Darlene Newsom, UMOM New Day Centers

Interviewed by: Rick McCartney, InMedia

UMOM New Day Centers has successfully merged and acquired three programs over the past ten years. There are many lessons learned and factors to consider before, during and after. This session will cover boards, culture, financial implications, communications and other discoveries. The most recent acquisition was Tumbleweed Center for Youth Development, an organization that had successfully served the Valley and homeless youth for over 43 years. While this acquisition was an unusual and unique circumstance that required "thinking outside the box" and presented challenges, it is also a circumstance all nonprofits can learn from in order to become stronger and more sustainable. What happened and what are the lessons learned? The goal of this session is to identify your potential areas of risk and provide you with strategies to strengthen your mission.



PM4 – Stronger Boards. Stronger Nonprofits.

Moderator: Sharon Flanagan-Hyde, Flanagan-Hyde Associates LLC

Panelists: Dawne Bell, Women's Foundation of Southern Arizona
Daniel Openden, SARRC
Brenda Thomson, Arizona Humanities

Join as for a candid conversation with three seasoned nonprofit executives as they share their experiences and best practices for managing and engaging board members and navigating through complex, but all-too-common, governance issues. Led by Board Source certified consultant, Sharon Flanagan-Hyde, the panel will touch on the issues of diversity and inclusion, fundraising and advocacy, and structuring the right board fit for your organization's needs. There will also be plenty of time built in for audience questions and conversation to facilitate a true peer-learning opportunity.



PM5 – Beyond the Bottom Line: Measuring the Social Impact of Arizona’s Nonprofit Sector

Presenter: Dr. Anthony Evans, Seidman Research Institute-ASU

Nonprofits are a major player in the Arizona economy, directly and indirectly responsible for nearly 8% of gross domestic product, 12% of paid jobs, 11% of wages, and almost 10% of taxes in Arizona in 2014. While that's an economic impact on a par with the retail and construction sectors, the social reach of nonprofits extends much further. In this session, you'll learn valuable information about the positive social impact of nonprofits that will make you a better advocate for your own organization and for the entire nonprofit sector. Be among the first to hear the findings of this follow-up to last year's report "Arizona Nonprofits: Economic Power, Positive Impact." That initial economic impact study, issued in March 2016, has been eye-opening. Many nonprofit leaders have found it to be a powerful tool for advocacy with government and business leaders.

This session will begin with an update of the nonprofit sector's economic impact in 2016, before presenting preliminary insights from the new social return on investment study of Arizona nonprofits. A panel of nonprofit leaders will discuss how they measure the social impact of their own nonprofits and how this information has helped their constituents view nonprofits with more respect. In addition to learning important measures of the vital short-term and long-term benefits nonprofits generate in a community, you'll learn tactics and receive tools for measuring and demonstrating nonprofit effectiveness beyond the bottom line basics of operating budget and overhead.



PM6 – Disrupting Your Brand Message for Mission-Centric Fundraising & Marketing

Presenters: Kristin Romaine, Like the Lettuce Co.,
Justin Foster & Emily Soccorsy, Root+River

You get 3-6 seconds to capture attention in the digital age and supporters and funders bombarded with information and requests. You know that your mission is essential. But how do you convey a message that sticks and leads to more successful ASKS? This session is for nonprofits ready to disrupt their brand message through an interactive workshop with leading brand strategists at Root+River, who will guide you through a playful design thinking workshop resulting in a truly memorable and mission-driven message for your nonprofit. You will then disrupt your approach to fundraising with Like the Lettuce fundraising strategists, by practicing applying your new message through lean methodologies to your entire funding and marketing canvas including grant funding requests, major gift asks and your social media presence. You will leave this session with a new elevator pitch, a funding and marketing canvas and renewed confidence in your ability to be mission-centric and crush it!



PM7 – “What’s the Story?: Articulating a New Narrative for the Nonprofit Sector” Deeper Dive Roundtable Discussion

Presenter: Jeff Moore, Independent Sector

This is an opportunity for a small group of executives to meet with Jeff Moore, Chief Strategy Officer of Independent Sector (Luncheon Keynote Speaker) and reflect on the keynote address and to offer their thoughts – from their unique vantage points – on why our story as a sector matters, what core message it should convey, and for whom that story most matters.