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1ST ANNUAL
SOUTHEAST IOWA
**NON
PROFIT**

SUMMIT

September 17, 2015
Bridge View Center
102 Church St., Ottumwa, Iowa
8 a.m. - 3 p.m.

sponsored by:



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1st Annual Southeast Iowa Nonprofit Summit

September 17, 2015
8:00 a.m. – 3:00 p.m.

Bridge View Center, Ottumwa, Iowa

This day-long event features stimulating dialogue, presentations, learning and networking opportunities addressing a variety of critical nonprofit capacity building topics. Perfect for board members, staff and volunteers! The entire day is designed to teach, inspire and connect the nonprofit community in Southeast Iowa. Look forward to creative presenters who are nationally recognized in their fields of expertise and dedication to assisting the nonprofit community. Continental breakfast and luncheon buffet also provided.

This event is offered free to participants thanks to the sponsorship of various elements by the Ottumwa Regional Legacy Foundation, United Way of Wapello County, Iowa State University Extension & Outreach, Wapello County Foundation and TD&T CPAs & Advisors.

Come to Learn.

Enjoy breakout sessions covering top trends, opportunities and challenges facing our sector—like fundraising, board governance, marketing and evaluation. Bring several members of your organization and take advantage of all the learning opportunities provided throughout the day.

Build Your Network.

Connect with nonprofit peers and funders in the region. The Southeast Iowa Nonprofit Summit will provide an opportunity for representatives from area nonprofits and other stakeholders to build relationships and leverage existing resources to build community and increase organizational impact.

The Nebraska Story: Using Asset-Based
Community Development Practices
To Help Communities Help Themselves



Schedule

Monday, September 17, 2015 · 8:00 a.m. – 3:00 p.m.
Bridge View Center, Ottumwa, Iowa



Jeffery G. Yost

Jeff Yost is the President and CEO of the Nebraska Community Foundation (NCF). NCF is a community development organization that uses philanthropy as a tool and is recognized as a national model for its community-led capacity building system. NCF serves as a value-added partner with its 223 affiliated funds to build communities people are attracted to being a part of. In the past five years NCF and its affiliated funds have received more than 35,000 contributions and reinvested over \$100 million in Nebraska hometowns. This session will help you understand the NCF theory of change, its skills building practices and lessons from a few of the many community-led success stories.

In the vision of Jeff Yost, the development of rural America is more than a challenge of money. Learn about what Yost is trying to do different in Nebraska in relation to leadership development, discretionary capital and on building a system that is all about helping communities to help themselves.

8:00 a.m. to 8:30 a.m. **Registration and Check-in**
(muffins · juice · coffee · water available)

PLEASE BE SEATED BY 8:30 A.M.

8:30 a.m. to 8:35 a.m.	Welcome
8:35 a.m. to 9:30 a.m.	Keynote Speaker
9:30 a.m. to 9:45 a.m.	Break (water · tea available)
9:45 a.m. to 10:45 a.m.	Breakout Session #1*
10:45 a.m. to 11:00 a.m.	Break (water · tea available)
11:00 a.m. to 12:00 p.m.	Breakout Session #2*
12:00 p.m. to 12:45 p.m.	Lunch (soup · salad · sandwich bar center lobby)
12:45 p.m. to 1:45 p.m.	Breakout Session #3*
1:45 p.m. to 2:00 p.m.	Break (water · tea available)
2:00 p.m. to 3:00 p.m.	Breakout Session #4*

* see centerfold for Breakout Session options

Session sponsored by



Robert Cline

Speaker:
Rob Cline, Director of Marketing and Communications
The University of Iowa's Hancher Auditorium

About Rob: Rob Cline is the director of marketing and communications for the University of Iowa's Hancher Auditorium, a freelance arts and entertainment writer, and author of the comic mystery novel *Murder by the Slice*.

Only Superheroes Should Have Secret Identities – Crafting & Sharing Your Story

Keeping the community informed about the good work your organization does requires two things – a compelling story told well and the right plan for sharing that story. This conversation will help you identify your most important stories, draft ways to tell them, and consider the various outlets—from print to social media and more—for sharing them. Storytelling is a superpower, and this exchange of ideas will help you wield it for good.

Session sponsored by



Dr. Jean Eels

Speaker:
Dr. Jean Eels, Owner, E Resources Group

About Jean: Jean brings to evaluation work a strong set of knowledge, skills, and experiences related to non-profit evaluation. She is a professional, with a Ph. D in Agricultural Education from Iowa State University. Her main areas of expertise include program evaluation, education and communications, project management, and group facilitation. Through her business, E Resources Group, Jean uses her expertise to help groups learn and succeed by helping them implement evaluations and learn from the data. In 2007, Jean received the Excellence in Interpretation Award from the National Association for Interpretation – Region V for her work in evaluation.

Answering The “So What?” Question

How do you approach evaluation when you're busy saving the world and working on all the other challenges to keep your non-profit afloat these days? Dr. Eels will share some ways to capture impacts and how to communicate that to funders and donors. She approaches evaluation from the big picture with specifics to help you find data you can use.

BREAKOUT SESSION OPTIONS

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Breakout Sessions

Option 1

Option 2

Option 3

Breakout Session #1
9:45 to 10:45



Robert Cline

Only Superheroes Should Have Secret Identities – Crafting & Sharing Your Story



Dr. Jean Eels

Answering The “So What?” Question



Mary Dooley

Are You Ready To Make The Ask?

Breakout Session #2
11:00 to 12:00



Ron Mirr

Grant Writing 101

David Little



Sarah Curfman

Nonprofit Boards – Oversight, Insight & Foresight



Christoph Trappe

I. Social Media - Why You Have To Be On Social Media And What Networks To Focus On & Why

Breakout Session #3
12:45 to 1:45



Christoph Trappe

II. Social Media Strategy - HowTo Get Started And Sustain Your Social Media Engagement



Regenia Bailey

Creating and Implementing Your Organization’s Strategic Plan



Ron Mirr

Grant Writing 101

Breakout Session #4
2:00 to 3:00



Robert Cline

Only Superheroes Should Have Secret Identities – Crafting And Sharing Your Story



Mary Dooley

Are You Ready To Make The Ask?



Courtney DeRonde

Budgeting: From Nightmare To Dream Come True

BREAKOUT SESSION OPTIONS

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Session sponsored by



Mary Dooley

Speaker:
Mary Dooley, Owner – Key Elements Consulting

About Mary: Mary Dooley knows and loves the nonprofit world. In her 20 years as executive director she grew her American Red Cross chapter from one county to five, her staff from one to seven, and the annual budget from \$75,000 to \$380,000. She was selected for several national Red Cross task forces and the President's Advisory Council; crafted national curriculum to train Public Affairs instructors, and continues as a member of their Advanced Public Affairs Team, serving as a national spokesperson for major disasters. A graduate of Iowa State University with double majors in mass communications and journalism, Mary had held teaching, radio and newspaper reporting positions in Washington D.C., Maryland and Iowa prior to her Red Cross career. She has earned numerous awards for her writing as well as her Red Cross work.

Are You Ready To Make The Ask?

Personal gift solicitation can be a bit like a jigsaw puzzle: it can fall into place easily if you've got the right pieces lined up. This workshop will cover some of the key elements you'll want your staff and volunteers to master to get results, including understanding why people give to non-profits; using a donor-centered approach; maintaining an organized donor tracking system; targeting the best prospects, and building strong relationships with donors. Review your organization's readiness; learn how to utilize volunteers as fundraisers and take home helpful handouts.

Session sponsored by



Ron Mirr

Speaker:
Ron Mirr, RM Consulting

About Ron: Ron Mirr has nearly 30 years of experience helping schools and social service agencies obtain over \$130 million in grant funds. He is a private consultant based in Iowa City and has worked as a mental health clinician, a school administrator, and a consultant to agencies in many states and internationally. Ron holds a Master's Degree in Social Work and is a frequent presenter at local, state and national conferences.

Grant Writing 101

This session is designed to introduce participants to the process of developing competitive grant proposals. Participants will leave the workshop with a clearer understanding of how to begin the grant writing process, where to look for resources, and how to prepare more competitive proposals. The Program Development and Grant Writing Workshop is intended for anyone interested in obtaining grant funds from public or private sources at the federal, state, and local levels.

Course information includes:

1. A description of the general grant process with a special focus on how grants are reviewed
2. Information about the location of funding sources and the use of electronic media to find them
3. Instruction on how to review an application to determine if it is appropriate for your agency
4. An introduction to 3 planning tools for the creation of effective grant proposals.

Session sponsored by



David Little



Sarah Curfman

Speakers:

David Little, Principal, CliftonLarsonAllen, LLP

About David: David Little has 15 years of experience in public accounting and works exclusively in the nonprofit arena providing audit, tax, consulting and accounting services to arts, social service, religious and membership-based organizations as well as foundations. He was recently named to the Corridor Business Journal's class of 2014 Forty Under 40 who recognizes leaders under the age of 40 who have made a significant impact in their organization, community or both early in their careers. David holds a Bachelor's of Arts in accounting from University of Northern Iowa, Cedar Falls, Iowa and is a Certified Public Accountant in the state of Iowa.

Sarah Curfman, Managing Consultant, CliftonLarsonAllen's Nonprofit Group

About Sarah: Sarah Curfman works with CLA nonprofit clients, bringing her expertise in organizational assessment, board governance, group facilitation, and fact-based research analysis. She is a recent past President and Board Chair of the Junior League of Minneapolis – a membership organization of women more than 800 women committed to promoting volunteerism, developing the potential of women and improving the community through the effective action and leadership of trained volunteers. Additionally, she has served on the boards of multiple Minneapolis-based nonprofit organizations including Social Venture Partners, Free Arts Minnesota and EAG. Sarah holds a B.A. in Accountancy with a minor in Fine Arts from Miami University in Oxford, Ohio and is a Public Accountant in the State of Iowa.

Nonprofit Boards: Oversight, Insight, & Foresight

Nonprofit boards are not just for show; they are a critical part of every organization. This presentation is designed to help you understand and examine the legal and ethical requirements of serving as a board member, including the difference between governance and management and when the board should play each role; the three modes of governance – fiduciary (oversight), strategic (insight), and generative (foresight); and value-added board actions and inquiries.

Session sponsored by



Christoph Trappe

Speaker:

Christoph Trappe

About Christoph: Christoph Trappe is a career storyteller who has worked as a journalist, a nonprofit executive, and a content marketing strategist and consultant. His digital initiatives have been recognized globally. He is currently helping hospitals across the United States share their authentic stories. He is a globally-recognized content marketing expert who frequently speaks at conferences – including Content Marketing World – about social media, blogging and executive buy-in. The Content Marketing Institute acknowledged him as a 2014 Top 100 Most Influential Content Marketer. Among other awards, he was also named a most influential content marketer on Twitter by London-based Axonn Media. Additionally, Christoph sits on the Internet Marketing Association's Executive International Council with representatives from brands like Nokia, Oracle, Wells Fargo and Google. In his role at MedTouch, Christoph and his team advise healthcare brands across the United States on blogging, social media and eNewsletter strategies and how to align those strategies with patient/member/donor acquisition efforts. The team also partners closely with clients as needed to implement strategies. A key part of the team's success is its internal engagement with physicians and leaders who actively request their guidance.

I. Social Media - Why You Have To Be On Social Media And What Networks To Focus On And Why

This interactive session will share why social media is now a must-have communications channel and discuss its benefits. We'll discuss brand lift, fundraising successes and other topics. This session also highlights the networks to focus on.

II. Social Media Strategy - How To Get Started And Sustain Your Social Media Engagement

This interactive session shows you how to get started in a meaningful and effective way. We'll discuss the importance of strategy, workflow and useful content. You'll be ready to get started after this session.

Session sponsored by



Regenia Bailey

Speaker:

Regenia Bailey, Principal and Founder - Bailey Leadership Initiative, LLC

About Regenia: Regenia Bailey is an organizational strategist, consultant, and coach. For the past eleven years, she has worked with organizations from all sectors on strategic positioning and organizational growth and development through her firm, the Bailey Leadership Initiative, LLC. Regenia is a former Mayor of the City of Iowa City, and served two terms on the Iowa City City Council. In addition to her consulting work, she has taught business courses as an adjunct faculty member at Kirkwood Community College. She has an MBA from The University of Iowa and additional training from BoardSource and the National Economic Gardening Institute. Regenia writes a monthly column about nonprofit boards for the Corridor Business Journal. You can read her columns and learn more about her work at her website: www.baileyleadershipinitiative.com.

Creating And Implementing Your Organization's Strategic Plan

Ensuring effective planning is one of the responsibilities of a nonprofit board, but many find that creating and implementing a strategic plan is challenging for their organizations. In this workshop, we will discuss how to develop your strategic plan and how to make sure your plan is used once you've created it. This workshop will include presentation as well as participant discussion. It will be useful for both directors of nonprofit organizations as well as board members, particularly those on the executive committee.

Session sponsored by



Courtney De Ronde

Speaker:

Courtney De Ronde, CPA, Audit Principal

About Courtney: Courtney De Ronde specializes in auditing and financial reporting for not-for-profit organizations. She graduated from the University of Northern Iowa with a degree in accounting and has 13 years of experience in the auditing profession. Approximately 70 percent of Courtney's audit clients are not-for-profit organizations, giving her a broad view of best practices. Courtney is recognized among others within the profession for her expertise as she presents at various conferences and seminars. Courtney is a member of the Iowa Society of Certified Public Accountants and the American Institute of CPAs. She gives her time and talents to several civic and nonprofit organizations as a volunteer board member.

Budgeting: From Nightmare To Dream Come True

You're making an impact and carrying out your mission; and you have dreams for your organization's future. Your budget is a planning tool to make sure those dreams come true. Your board and staff likely view the budgeting process as a nightmare filled with spreadsheets and math. In this session, we will talk about how to make numbers come alive, especially for non-financial people. As a result, the budget will become a roadmap to making your organization's dreams of sustainable programs, covering overhead and funding future infrastructure come true.

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