


FREE EVENT  
Register online now:  
<http://bit.ly/NPSummit2016>  
or 641.455.5260

2<sup>ND</sup> ANNUAL  
SOUTHEAST IOWA  
**NON  
PROFIT**  
  
**SUMMIT**

Thursday, September 29, 2016  
Bridge View Center  
8 a.m. - 4 p.m.

sponsored by:



2<sup>ND</sup> ANNUAL  
SOUTHEAST IOWA  
**NON  
PROFIT**  
SUMMIT

FREE EVENT

Register online now:

<http://bit.ly/NPSummit2016>

or call 641.455.5260

sponsored by:



## 2<sup>nd</sup> ANNUAL SOUTHEAST IOWA NONPROFIT SUMMIT

September 29, 2016  
8 a.m. – 4 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 **engaging millennials**, **board effectiveness**, **social media** and **successful grant writing**. 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.

Session sponsored by



## Are You Ready for the Zombie Apocalypse?

### Top 10 Risks Facing Nonprofits

#### Keynote Speaker



Melanie Lockwood Herman, Esq.

Melanie Lockwood Herman, Esq. has served as Executive Director of the Nonprofit Risk Management Center since 1996 and has held senior management positions in the nonprofit sector since 1987. Melanie is the principal author of 20 books on various risk management topics and is the architect of the Center's popular cloud applications. She is the former head of the Legal Section of ASAE: The Center for Association Leadership, a former member of the inaugural Not-For-Profit Advisory Committee of the Financial Accounting Standards Board (2010-2012), and a seven-time member of The NonProfit Times "Power and Influence Top 50." Melanie earned a Bachelor of Arts in Urban Affairs from the American University (Washington, DC), and a Juris Doctor from George Mason University (Arlington, VA). She is a member of the District of Columbia Bar Association and currently serves on two national nonprofit boards (American Foundation for the Blind, and the National Human Services Assembly).

Melanie has served as the lead consultant on dozens of risk consultancies for medium to large nonprofit organizations, including more than 50 Risk Assessments. She has delivered countless presentations on risk and insurance topics at national and international conferences, and has also presented numerous briefings to the boards and executive teams of Center clients.



#### Schedule

September 29, 2016 · 8 a.m. – 4 p.m.  
Bridge View Center, Ottumwa, Iowa

**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 9:40 a.m.

Break (water · tea available)

**9:40 a.m. to 11:00 a.m.**

**Breakout Session #1\***

11:00 a.m. to 11:10 a.m.

Break (water · tea available)

**11:10 a.m. to 12:30 p.m.**

**Breakout Session #2\***

12:30 p.m. to 1:15 p.m.

Lunch & Roundtable Discussions

**1:15 p.m. to 2:30 p.m.**

**Breakout Session #3\***

2:30 p.m. to 2:40 p.m.

Break (water, tea available)

**2:40 p.m. to 4:00 p.m.**

**Panel Discussion**

\* see centerfold for Breakout Session options



Sessions sponsored by



Sarah Curfman

Speaker:

Sarah Curfman, CliftonLarsonAllen LLP, Consulting Manager

Sarah Curfman is a managing consultant with CliftonLarsonAllen's Public Sector Group, specializing in the areas of financial and operational consulting. Sarah has over 18 years of experience in both the private and public sector. Sarah's areas of expertise include financial analysis and modeling; organizational assessment; philanthropic due diligence; and board facilitation, assessment and training.

Sarah graduated from Miami University in Oxford, Ohio with a B.S. in Accountancy and a minor in Fine Arts. Sarah has extensive experience in the board room, both as a facilitator and board member. Currently, she serves as the president of POLL, the Association of Junior League International's affinity group for the association's largest leagues; and as a board member for CLA Foundation. She is a former Board Chair and President of the Junior League of Minneapolis; board member for Social Venture Partners Minnesota; and Free Arts Minnesota. Sarah is a BoardSource Certified Governance Consultant.

---

## Bringing Diversity to the Board Room: Industry Trends, Best Practices and Discussion

Session 1: 9:40 am - 11:00 am

This interactive session will explore industry trends from BoardSource's most recent report "Leading with Intent: A National Index of Nonprofit Board Practices"; showcase best practices from board rooms across the nation; discuss ways to increase diversity across age, race, income, geography and other factors.

---

### Board Effectiveness:

## How Do We Hold Ourselves Accountable?

Session 3: 1:15 am - 2:30 am

In this session, we will take a deep dive into the practices of board evaluation and explore best practices on how we can better hold ourselves accountable. From instant feedback after board meetings, to one-on-one personal calls with board members, to formal board evaluations – we will share tips, tricks, and trends that you can take back to your organization to enhance your own board's effectiveness

Session sponsored by



Don Broshar

Speaker:

Don Broshar, Human Resource Consultant, Iowa State University

Don Broshar has worked in human and organization development for more than 43 years, 39 of those with Iowa State University and ISU Extension and Outreach. He has served as a youth program coordinator, a youth and family counselor, a county extension director, an organization development specialist, a youth development specialist, a community leadership development specialist, and director of Extension and Outreach Human Resources. He is currently a part-time ISU human resource consultant in leadership and supervisory development and also works as a private consultant. He has facilitated groups ranging from nonprofit youth and community groups to university work-groups to business employees. He has trained staff and faculty on topics including communications, stress management, coping with change, conflict management/resolution, etc.

---

## Finding Comfort In Conflict

Session 1: 9:40am - 11:00 am

Not many people are comfortable with conflict situations. In fact, many people will try to avoid conflict whenever possible. In this workshop the participants will experience activities and information designed to help them become more confident in handling conflict and, therefore, more comfortable with it. The participants will explore what conflict means to them and how they feel about dealing with it. They will also review a model for managing or resolving conflict in an effort to create a process for handling conflict.

BREAKOUT SESSION OPTIONS

BREAKOUT SESSION OPTIONS

Breakout Sessions

Option 1

Option 2

Option 3

<p>Breakout Session #1 9:40 to 11:00</p>	 <p>Don Broshar Finding Comfort in Conflict</p>	 <p>Sarah Curfman Bringing Diversity to the Board Room: Industry Trends, Best Practices, and Discussion</p>	 <p>Samantha Boyd Create Content, Create Community: How to Use Social Media Effectively and Efficiently</p>
<p>Breakout Session #2 11:10 to 12:30</p>	 <p>Paul Thelen Resources &amp; Strategies for Rural Nonprofits</p>	 <p>Sue Prochazka Planning for Success: Volunteer Recruitment and Engagement Tips and Tools</p>	 <p>Samantha Boyd Create Content, Create Community: How to Use Social Media Effectively and Efficiently</p>
<p>Breakout Session #3 1:15 to 2:30</p>	 <p>Courtney De Ronde Understanding and Engaging the Next Generation of Donors, Volunteers &amp; Employees</p>	 <p>Sarah Curfman Board Effectiveness: How Do We Hold Ourselves Accountable</p>	 <p>Paul Thelen Navigating Common Obstacles</p>
<p>Panel Discussion 2:40 to 4:00</p>	<p>Panel Discussion: Through The Funder's Looking Glass</p> <p>Panelists:</p>     <p>Denise Callarman Michelle Moore, Joe Sorenson Mary Van Zante</p>		

BREAKOUT SESSION OPTIONS

BREAKOUT SESSION OPTIONS



Sessions sponsored by



Samantha Boyd

Speaker:

Samantha Boyd, Owner – Zao525

Samantha Boyd is a native Iowan who loves local business, connecting with people over coffee, and spell check.

In 2010, Samantha realized the need for a creative consulting firm that specialized in small business and non-profits, and Zao525 was formed.

Samantha takes pride in being a creative spirit who has a devotion to detail. She believes in being a community leader, has served on non-profit boards and committees, and is a proud 2013 Leadership Iowa graduate.

Samantha manages her career, her company, and her life, with zao – a fresh, bold and efficient spirit!

---

## Create Content, Create Community:

### How to Use Social Media Effectively and Efficiently

Session 1: 9:40 am - 11:00 am

Session 2: 11:10 am - 12:30 am

It's likely that by now your organization has a Facebook page, tweets every now and again, maybe shared a video on an otherwise-lonely YouTube page. You keep hearing about how you should be "creating content" – but what exactly does that mean? And for the love... how do you possibly make time for all of this?

In this session, we'll give you permission to not "do it all" (reason enough to attend!). We will offer you tricks and tools that you can take back to make social media posting and monitoring quicker, easier and more fun. Expect handouts and homework!

Session sponsored by



Paul Thelen

Speaker:

Paul Thelen, Larned A. Waterman Iowa Nonprofit Resource Center

Paul Thelen is assistant director at the Larned A. Waterman Iowa Nonprofit Resource Center where he works with nonprofit leaders from across the state. He also teaches courses on nonprofit organizations as an adjunct faculty member at the Iowa College of Law. Paul is a native Iowan who grew up on his family's farm near Vail, and he currently resides in Riverside.

---

## Resources & Strategies for Rural Nonprofits

Session 2: 11:10 am - 12:30 am

Strong nonprofit organizations are vital to our communities. More than 1 in 3 Iowans live in rural areas, and leaders of rural nonprofits face increasing challenges to fund and operate their organizations. This session will explore resources and strategies that are particularly valuable to rural nonprofits. Participants will hear stories of how rural nonprofits have used collaborative and creative measures to advance their missions and serve the people in their communities.

---

## Navigating Common Obstacles

Session 3: 1:15 am - 2:30 pm

Experience is a great teacher, but we'd prefer to learn from the mistakes of others and avoid problems altogether. From organization to communication to fundraising to leadership, we will review common issues that many nonprofits in Iowa face. Participants will learn strategies for how to avoid common pitfalls, as well as potential solutions to obstacles you cannot avoid.

Session sponsored by



Sue Prochazka

Speaker:

Sue Prochazka, Volunteer Center Coordinator at United Way of the Great River Region

Sue Prochazka is the Volunteer Center Coordinator at the United Way of the Great River Region. Sue has over 30 years of experience in human services as a nonprofit executive director, trainer and consultant. In addition to her work with United Way, she also provides training and coaching in organizational and professional development at Southeastern Community College Center for Business. The United Way of the Great River Region serves Lee County in Iowa, Clark County in Missouri, and Hancock County in Illinois.

---

## Planning for Success:

### Volunteer Recruitment and Engagement Tips & Tools

Session 2: 11:10 am - 12:30 pm

How does your organization assess, plan, and focus on recruitment and engagement of volunteers? Best practices teach us that a clear understanding of our program needs improve our ability to connect with volunteers who support our cause. This workshop will give participants tools for developing strategies that work. Information about state and national resources including Service Enterprise. A Service Enterprise is an organization that fundamentally leverages volunteers and their skills across all levels of the organization to successfully deliver on its social mission.

Session sponsored by



Courtney De Ronde

Speaker:

Courtney De Ronde, CPA, Audit Principal

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 14 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.

---

## Understanding and Engaging the Next Generation of Donors, Volunteers and Employees

Session 3: 1:15 pm - 2:30 pm

Each generation assumes there's "one right way" - their own! This session will open your eyes to the formative events that have shaped the characteristics and behaviors of each generation. Instead of waiting for the next generation to "see it your way," you will learn practical ways to leverage these differences within your organization - with donors, volunteers and employees.



Session sponsored by



Panelists:



## Denise Callarman

Denise Callarman, CPC, MBC

Denise Callarman is a Certified Professional Coach (CPC) and Master Business Coach (MBC) certified by the Fowler International Academy of Professional Coaching. Her speciality is in serving executives and founders of Non-Profit Organizations.



## Michelle Moore

Michelle Moore, Area Director for USDA Rural Development

Michelle and her staff deliver grant and loan programs to 19 counties in Southeast Iowa. Michelle has worked with community and economic development non-profits for over 25 years, first internationally as a Peace Corps Volunteer in West Africa and then as a grant writer for various entities.



## Joe Sorenson

Joe Sorenson, Director of Affiliate Relations, Community Foundation of Greater Des Moines

Joe maintains and provides service and support to over 30 county and community affiliates and their family of funds. He currently serves on the board of the Young Nonprofit Professionals Network – Des Moines and is an active volunteer for Junior Achievement of Central Iowa.



## Mary Van Zante

Mary retired from Pella Corporation in 2014. She was instrumental in forming the Pella Community Betterment Organization, a supporting organization designed to encourage charitable support for community entities, with the first project being Pella Cinemas. Mary was a founding member of the Marion County Community Foundation, completing a 10-year term in 2015.

---

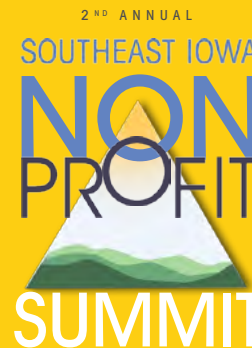
Panel Discussion:

## Through the Funder's Looking Glass

Session 4: 2:40 pm - 4:00 pm

*"Read the directions and directly you will be directed in the right direction."* - Lewis Carroll

The nonprofit world is tough these days. Much like Alice, you have to continue to provide services while navigating the rabbit hole of bureaucracy, shrinking budgets, and risk management, all without losing your head! Let this panel of experienced funders help guide you through the wonderland of grant funding.



Committee Members:

## Kelly Genners

Vice President of Programs and Initiatives  
Ottumwa Regional Legacy Foundation

## Amy Nossaman

Grant Programs Manager  
Ottumwa Regional Legacy Foundation

## Courtney De Ronde

CPA, Audit Principal  
TD & T CPAs and Advisors

## Blair Siems

Executive Director/CEO  
United Way of Wapello County

## Himar Hernandez

Assistant Director  
Iowa State University Extension & Outreach

## Chuck Kiple

Board member  
Wapello County Foundation



# SOUTHEAST IOWA NONPROFIT SUMMIT

sponsored by:



FREE EVENT

Register online now:

<http://bit.ly/NPSummit2016>

or 641.455.5260