Join us for our most anticipated event of the year! The buzz is still alive from last year's conference, and we have developed even more great content, networking and growth opportunities for this year's event.

This year's theme is **ADVANCE**, featuring two full days of relevant programming with a lens towards innovation, equity and advancement of thought and skills through two deep-dive sessions, three keynotes and 12 breakout sessions.

This conference offers something for everyone, from EDs/CEOs, to development teams, to program staff, and even board members. Join your colleagues for both days, or pick and choose which day works best for you. Either way, we are looking forward to seeing you in September and **advancing together!**

**Day One:**
- **Wednesday, September 26, 2018**
  - (Breakfast & Networking - 7:30am to 9:00am, Program - 9:00am to 4:00pm)

**Day Two:**
- **Thursday, September 27, 2018**
  - (Breakfast & Networking - 7:30am to 9:00am, Program - 9:00am to 3:45pm)

**Location:**
- Desert Willow Conference Center
  - 4340 E Cotton Center Blvd
  - Phoenix, AZ 85040

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**Day 1 – Wednesday, September 26 Schedule**

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<th>Time</th>
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<tbody>
<tr>
<td>7:30am-9:00am</td>
<td>Registration, Networking &amp; Breakfast</td>
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<tr>
<td>9:00am-12:00pm</td>
<td><strong>Advancing Innovation Deep Dive Session:</strong> Futurecast</td>
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<td>Matt Lehrman, CEO, Audience Avenue</td>
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<tr>
<td>12:00pm-1:00pm</td>
<td>Funder &amp; Nonprofit Meet N’ Greet, Lunch &amp; Open Networking</td>
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<tr>
<td>1:00pm-4:00pm</td>
<td><strong>Advancing Equity Deep Dive Session:</strong> Awake to Woke to Work: Building a Race Equity Culture</td>
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<td>Monisha Kapila, Founder and CEO, ProInspire &amp; Andrew Plumley Sr., Program Manager, Equity in the Center</td>
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To register go to ArizonaNonprofits.org/Advance
The future may be unknowable, but it is most definitely malleable.

Amid incredible technological, demographic and economic shifts, now is the ideal time to stretch your capacity to anticipate, adapt, and affect your organization's future. This session is unlike any seminar you've ever attended. No lectures. No PowerPoint. No statistics. Participate, instead, in a series of substantive thought exercises designed to elevate your focus beyond today's constraints and worries. Discover the skills to focus yourself and your team on the important opportunities of tomorrow.

This workshop consists of a series of deep-dive group exercises, facilitated by Matt Lehrman of Audience Avenue, in which you'll dream, reflect, strategize, debate, analyze, plan and ponder creative ways to bravely lead your organizations to a vibrant and relevant future.

This workshop is entirely action-oriented. Expect to take away:

- Fresh and vivid expectations of your world 5 years from now.
- Introduction to a highly-effective discipline of nurturing strategic options and opportunities.
- Practical insights into the evolving nature of community engagement.
- A collection of profound actions and creative ideas from which to spark even more innovative discussions.

Matt Lehrman is passionate about growing communities of support for nonprofit organizations. As the principal of Audience Avenue LLC, he provides services in customer service design, marketing, membership cultivation, strategic planning and community visioning and consensus building. He speaks nationally on topics of loyalty, customer engagement, and audience development throughout the nonprofit and for-profit sectors. In Arizona, Matt may be best known as the founder and longtime Executive Director of Alliance for Audience & ShowUp.com - a collaboration of the state’s arts & cultural sector, for which the Arizona Republic named him the Cheerleader for the Arts and wrote, “For some, arts marketing is a career. For Lehrman, it’s a calling...His enthusiasm is genuine and infectious.”
Awake to Woke to Work: Building a Race Equity Culture

Advancing Equity Deep Dive Session
1:00pm-4:00pm

Monisha Kapila, Founder and CEO, Prolnspire
Andrew Plumley Sr., Program Manager, Equity in the Center

Lack of diversity is often treated as a recruiting issue, yet the challenge runs deeper than the myth of the “talent pipeline.” At its core lies an organizational culture rooted in systemic racism.

With the lack of diversity, inclusion, and equity at the forefront of our workforce and national dialogue, and with demographics shifting towards racial diversity, nonprofits must confront the true nature of this challenge, face the bias implicit to our institutions, and commit to adopting policies and practices that create a culture of inclusion and equity. Only then can we honor our missions to serve the common good.

In this session, we will engage and support leaders for bold conversation on the cases, tactics, and tools that will drive action to combat structural racism in the nonprofit sector. Participants will have facilitated conversations on the role that leaders play in driving action within their organizations. Research from Equity in the Center will be shared in an interactive forum that promotes peer learning and empowers participants to move from intention to action as they address the adaptive challenge of shifting organizational culture toward inclusion and equity. To conclude, participants will define actionable next steps for progress.

Monisha Kapila founded Prolnspire to develop leaders at all levels for the social sector. The Chronicle of Philanthropy named Prolnspire one of 7 Nonprofits to Watch in 2015. Monisha previously worked for Capital One, Accion, CARE, and Arthur Andersen. Monisha has an MBA from Harvard Business School, where she received the Dean’s Award, and a BBA from the University of Michigan. Monisha is a Board Member of the National Human Services Assembly and Chairs the Board of AchieveMission, a nonprofit talent consulting firm. She has written extensively about equity and inclusion, leadership, and Millennials in the nonprofit sector. Monisha has been recognized as Chronicle of Philanthropy’s 40 Under 40, HBS Leadership Fellow, American Express NGen Fellow, and America’s Leaders of Change.

Andrew Plumley is first and foremost an equity and inclusion leader with expertise enhancing access and outcomes for underrepresented groups. He has experience in sustainability, strategy, and diversity, equity, and inclusion consulting in both the social and private sectors. He started his career in education, where he advised higher education institutions on diversity and inclusion strategy, as well as provided access and success programming for Pell eligible students of color. He currently serves as a Young Black and Giving Back Institute board member, as well as served as a city council appointed Police Commissioner in the state of Vermont. Andrew has a BA from Middlebury College, and received an MBA with a focus in social and environmental sustainability from the University of Vermont’s Grossman School of Business.
# Day 2 – Thursday, September 27 Schedule

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<th>Time</th>
<th>Event</th>
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<tr>
<td>7:30am-9:00am</td>
<td>Registration, Networking, Breakfast &amp; Visit Exhibitors</td>
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| 9:00am-9:45am | **Opening Session & Advancing Innovation Keynote:**  
Removing Uncertainty When Solving Wicked Social Problems  
Heather Hiscox, Co-Founder & Co-Director, Moves The Needle |
| 9:45am-10:00am| Break                                                                |
| 10:00am-11:30am| **Morning Breakout Sessions (1-6)**  
1 – Risky Business: Managing Modern Day Risk Management Challenges from Social Media to Workplace Safety  
2 – Nonprofit Advocacy: Yes You Can and Why You Should  
3 – Digital Storytelling: Your Ultimate Marketing Tool  
4 – The Future of Leadership: Advances and Options (to Fill the Gap)  
5 – The Shift From Fiction Writing To a Grant Proposal No Funder Can Refuse  
6 – Improv Skills That Fuel Collaboration |
| 11:30am-12:15pm| Lunch, Networking and Visit Exhibitors                                |
| 12:15pm-1:00pm| Luncheon Keynote:  
**Mission Critical: Leadership for the New Reality**  
Monisha Kapila, Founder and CEO, ProlInspire & Andrew Plumley Sr., Program Manager, Equity in the Center |
| 1:00pm-1:15pm | Break                                                                |
| 1:15pm-2:45pm | **Afternoon Breakout Sessions (1-6)**  
1 – Keys to Engaging Corporate Volunteers  
2 – Communicating Your Impact Through Social Return On Investment  
3 – Nonprofit Advocacy: Tools To Advance Your Strategy  
4 – Securing Transformative and Major Gifts  
5 – Preventing and Resolving Workplace Harassment  
6 – What’s Trending? Using Budgeting and Forecasting to Advance Your Mission |
| 2:45pm-3:00pm | Break                                                                |
| 3:00pm-3:45pm | Advancing Equity Closing Keynote:  
**Unconscious Bias**  
Removing Uncertainty When Solving Wicked Social Problems
Opening Session & Advancing Innovation Keynote
Heather Hiscox, Co-Founder and Co-Director of Social Impact Programs, Moves The Needle

What if there was a whole new way to create impact around social problems? What would be possible if we re-thought how we connect with our stakeholders, our funders, and with each other? Learn five simple ways that you can transform your work, your relationships, and future success. Explore the ways to shift from status quo to becoming a part of the next generation of social impact trailblazers.

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Heather Hiscox is a social entrepreneur passionate about creating communities focused on assets, abilities, and abundance. She is the Co-Founder and Co-Director of Social Impact Programs at Moves The Needle where she teaches organizations how to use Lean Innovation to eliminate the waste in how we create social change.

Heather is also the creator of Wish List Hero.org, a website that unites nonprofit needs and the community and publishes the greatest wishes of nonprofits each week in the Arizona Daily Star. She mentors numerous social entrepreneurs each year and is active in creating more powerful entrepreneurial ecosystems. Heather has received numerous awards for her leadership and commitment to the community, including University of Arizona Honors College Young Alumna, TEDx Starr Pass Women Local Leader, Greater Tucson Leadership Ronald L. Kurth Award, 40 Under 40, and Inside Tucson Business Up and Comer.
Mission Critical: Leadership for the New Reality

**Luncheon Keynote**

Monisha Kapila, Founder and CEO, ProInspire

Andrew Plumley Sr., Program Manager, Equity in the Center

With so many forces pulling at the fabric of the nonprofit sector, it is critical that we support leaders at all levels and foster the skills and behaviors needed to confront the challenges we face — both as a sector and more importantly, in the communities we serve. Yet what are these skills, and how can leaders best develop them?

At ProInspire, we believe that nonprofit leaders must understand the importance and interconnectivity of equity, collaboration, and systems change in order to advance our missions and position our sector for accelerated social impact. Our goal is to support and inspire leaders at all levels (including those without positional authority) to develop related skills within four spheres of influence: leading self, leading others, leading in organizations, and leading in systems. In this keynote address, we will use our newly developed competency model to highlight the essential skills and behaviors around equity, collaboration, and systems change that contribute to both individual career growth and greater social impact.

****

Monisha Kapila founded ProInspire to develop leaders at all levels for the social sector. The Chronicle of Philanthropy named ProInspire one of 7 Nonprofits to Watch in 2015. Monisha previously worked for Capital One, Accion, CARE, and Arthur Andersen. Monisha has an MBA from Harvard Business School, where she received the Dean’s Award, and a BBA from the University of Michigan. Monisha is a Board Member of the National Human Services Assembly and Chairs the Board of AchieveMission, a nonprofit talent consulting firm. She has written extensively about equity and inclusion, leadership, and Millennials in the nonprofit sector. Monisha has been recognized as Chronicle of Philanthropy’s 40 Under 40, HBS Leadership Fellow, American Express NGen Fellow, and America’s Leaders of Change.

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Unconscious Bias

**Advancing Equity Closing Keynote**

Krista Watson, Program Analyst for Outreach and Education,
U.S. Equal Employment Opportunity Commission (EEOC) – Phoenix District Office (AZ, NM, UT)

This is not discrimination!! No one likes to be accused of employment discrimination. Have you ever notified a supervisor about a complaint of discrimination and the response is immediately angry? This is a time to take a step back and look at the situation with an open mind. As much as we like to think of ourselves as logical, rational people, the truth is we are not always aware of what motivates many of the decisions we make.

Unconscious bias, based on impermissible things such as race, gender, age, religion and disability, can influence many of the employment decisions our managers and supervisors make. Learn how it works and discover strategies for combating unconscious bias and minimizing its influence in the workplace. EEOC will start the session off with a general EEOC overview and then move into the topic of unconscious bias.

*****

Krista Watson serves as the Program Analyst for the Phoenix District Office of the U.S. Equal Employment Opportunity Commission (EEOC). As the Program Analyst she is responsible for the Phoenix District Office’s Outreach and Education program in Arizona, New Mexico and Utah. Ms. Watson is a frequent speaker throughout the District about employment related matters, EEOC laws, guidance and procedures and she is a featured speaker at many conferences and meetings. In addition to her duties in the Phoenix District, Ms. Watson is a frequent trainer on national training projects. Before serving in this position, Ms. Watson was an Investigator and the Charge Receipt Supervisor. As an Investigator, Ms. Watson investigated individual and class complaints of employment discrimination. Prior to joining the Commission, twenty four years ago, Ms. Watson worked for the Department of Justice. She received her M.A. and B.A. from Western Illinois University.
Day 2 - Breakout Session Descriptions

You will have the opportunity to attend one of six morning and afternoon breakout sessions. Upon registration you will have the opportunity to select which morning and afternoon sessions you are most interested in, however this does not mean you have to attend that session. (This is only to assist us with planning efforts.)

AM1 – RISK MANAGEMENT
   Risky Business: Managing Modern Day Risk Management Challenges from Social Media to Workplace Safety

AM2 – ADVOCACY
   Nonprofit Advocacy: Yes You Can and Why You Should

AM3 – MARKETING
   Digital Storytelling: Your Ultimate Marketing Tool

AM4 – SUCCESSION PLANNING
   The Future of Leadership: Advances and Options (to Fill the Gap)

AM5 – FUNDRAISING
   The Shift from Fiction Writing to a Grant Proposal No Funder Can Refuse

AM6 – COLLABORATION
   Improv Skills That Fuel Collaboration

PM1 – VOLUNTEERISM
   Keys to Engaging Corporate Volunteers

PM2 – NONPROFIT IMPACT
   Communicating Your Impact through Social Return On Investment

PM3 – ADVOCACY
   Nonprofit Advocacy: Tools to Advance Your Strategy

PM4 – FUNDRAISING
   Getting to Know Your Donor from “the Inside Out”

PM5 – HUMAN RESOURCES
   Preventing and Resolving Workplace Harassment

PM6 – FINANCE
   What’s Trending? Using Budgeting and Forecasting to Advance Your Mission
Morning Breakout Sessions (10:00am-11:30am)

**AM1 – Risky Business: Managing Modern Day Risk Management Challenges from Social Media to Workplace Safety**

*Craig Carson*

*Director of Workers Compensation and Risk Management Services, Southwest Risk Management*

This breakout session will focus on the strategies to managing modern day challenges faced by all organizations. It is better to implement your Risk Management strategy now before any unwanted complaints or worse, lawsuits, show up on your desk. Employee morale and behavior is a constant worry for management, whether you are hiring employees fresh out of college, or needing the experience of veteran employees. Build a bridge of understanding to fill in the gaps inherent to this situation.

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Craig Carson began his insurance career in September 1999 after graduating from the University of Arizona with an Accounting degree. He accepted a position as an Auto Claims Adjuster with 21st Century Insurance. He gained a strong working knowledge of the insurance coverages, and how to protect one’s assets. This experience helped him to build successful insurance career spanning now 18 years. Craig wanted to grow beyond personal lines insurance and took a job with SCF Arizona. This job gave him a much appreciated opportunity to grow professionally. He ran a large workers compensation book of business. All facets of the workers compensation policy were learned quickly to support the policyholders. SCF Arizona helped him to see his potential. Change is inevitable, Craig would see another change in his career when Southwest Risk Management offered him an opportunity to run the Workers Compensation and Risk Management Departments. He has worked for the last 7 years to build and support Southwest Risk Management. He has worked with over 300 businesses and organizations over the last 11 years in Arizona. He has seen many strategies and models for success which he now utilizes in his day to day approach to business.
AM2 – Nonprofit Advocacy: Yes You Can and Why You Should

Kristen Merrifield  
CEO, Alliance of Arizona Nonprofits

Nonprofits and industry professionals have a vital role to play in educating and collaborating to advocate for our causes, programs, and clients. Contrary to popular misconception, nonprofits, public charities and other stakeholders can engage in advocacy, public policy, and even lobbying, though not all of these require direct action in the halls of Congress or at the State Capitol. Learn what you can (and can’t) do, as well as easy tools to help you become a better advocate and share your story and impact in our communities.

*****

Kristen Merrifield brings extensive leadership to the Alliance, most recently serving as the Chief Operating Officer at the Arizona Small Business Association (ASBA), the largest trade association in Arizona serving over 10,000 small business owners and entrepreneurs. Through her previous roles at ASBA, the ASU Foundation and the Greater Phoenix Chamber of Commerce, she brings over 12 years of association and nonprofit knowledge and expertise to her new role as Alliance CEO. Kristen is an active participant in the business and non-profit community serving as a productive member and President-Elect of the Arizona Society of Association Executives; Silver Level Supporter, Board Member and Treasurer of Gabriel’s Angels; past board member of the Phoenix Workforce Connection; member of the American Society of Association Executives (ASAE); graduate of the ASU Lodestar Center’s Generation Next Nonprofit Leadership Academy; graduate of the ASBA Executive Business Mentoring Program; and also earned her Certificate of Association Management from ASAE. Kristen also holds the prestigious Certified Association Executive designation. She has dedicated her career to serving others and is a respected and well-rounded leader.
Looking to boost engagement across your nonprofit’s marketing channels? Learn how to harness the power of storytelling to enliven your donor communications — and drive results. From collecting data and sharing testimonials to managing Google Grants and email campaigns, our subject-matter experts will share winning strategies and offer specific action points you can implement within your organization. Attendees will receive an informational takeaway piece from the session.

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Tina Kelly, Chief Marketing Officer, Casual Astronaut. Tina brings more than 10 years of experience to Casual Astronaut, the local marketing agency that partners with the Alliance to support Arizona Gives Day. At C/A, Tina partners with brands and nonprofits to develop digital marketing campaigns that leverage content, encouraging audiences to consume, engage, share and convert. Tina’s experience spans industries, having led digital marketing strategy development and execution for several global and national brands, including The Children's Place, Nationwide Insurance, Solar City and many more. Tina has presented at a number of industry conferences and events, including Content Marketing World and SXSW Interactive.

Ever since the kitten born in Michael Morefield’s closet when he was 4 years old, he has loved every animal he has ever met, wild and domestic. Michael attended the University of Arizona (Bear Down) and moved from odd job to odd job, looking for something that gave him purpose. After a stint as a flight attendant and years in hospitality management, Michael realized volunteering with local charities such as Gabriel’s Angels and Sojourner Center gave him the most joy in life. His love of animals guided him to AAWL in 2013, and he has been grateful for the opportunities working his way up through the company to director. He loves being a cheerleader and champion for all the pets at AAWL, either in the media or wacky projects and promotions. When not fostering puppies or mentoring animal advocates, Michael loves to spend his free time gardening, traveling, working on cars, and spending time with the two dogs that run his life; Ryker and “Bratty” Addie. Both rescues, Addie was returned four times to AAWL for her shyness before Michael “Foster Failed” and adopted his sweet girl.
AM4 – The Future of Leadership: Advances and Options (to Fill the Gap)

Bruce Weber
Founder and President/CEO, Weber Group

Dr. Tiffanie Dillard
Principal and Founder, Avenir Consulting Partners

Over the next 5 years it is estimated that leadership turnover in the nonprofit sector will hover around 90%. Some departures will be retirement, changing organizations, and individuals leaving the sector. Preparing for this transition is vital to the sustainability of an organization! In this session, learn ways to address these looming changes in the leadership ranks through an engaging and interactive workshop by two experienced professionals.

Bruce Weber is Founder and President/CEO at Weber Group, an independent consulting firm that assists social-sector organizations in realizing their potential and achieve long-term sustainability through transformational execution. Bruce brings over 20 years of experience to the for-profit and non-profit community, working with startup, growth, and mature organizations. He assists in strengthening organizations through, strategic planning and visioning, organizational development, leadership and board development, board recruitment, and board onboarding, all with an emphasis towards mission attainment and fulfillment.

As a BoardSource Certified Governance Trainer, Bruce delivers cutting edge tools and methodologies to assist in building the right governing board to support the organization. His approach to planning and strategy provide focus in helping organizations build capacity for long term sustainability. Bruce is qualified to provide the guidance and tools necessary to make a successful impact on an organization, having served in various roles on non-profit boards such as the Desert Botanical Garden and Assistance League of Phoenix. He is also a graduate of Valley Leadership Institute Class 38 and enjoys cycling, hiking, guitar and exploring the outdoors.

From her commitment to make a difference in the social sector, Dr. Tiffanie Dillard envisioned a collective of experienced, credentialed, dedicated nonprofit leaders and consultants who Collaborate for the Common Good™. She coaches individuals and teams in Organization Development, Culture Transformation, Strategic and Operational Planning and Talent Strategy implementation. Her work leverages her hands-on experience and her sector-based research to support the unique needs of nonprofits at each life stage, from start-up to growth to complete organization transformation. She has held Arizona based nonprofit roles of Chief People Officer, Chief Administrative Officer, Interim CEO, Founding Board Member, Board Member and Board Chair, following two decades in leadership roles in the corporate sector. Her PhD is in Human and Organizational Systems from Fielding Graduate University. She is certified as a Senior Professional in Human Resources (SPHR and SHRM-SCP) and is an ICF Credentialed Professional Coach (ACC).
AM5 — The Shift from Fiction Writing to a Grant Proposal No Funder Can Refuse

Heather Hiscox
Co-Founder and Co-Director of Social Impact Programs, Moves The Needle

What if you could craft a grant proposal that was full of insight and evidence of what you knew would create impact? What if you efficiently and quickly got those answers and packaged them in a way that made you stand out from all other grant proposals? Join us to learn a whole new way to engage foundations and craft your next grant proposal.

*****

Heather Hiscox is a social entrepreneur passionate about creating communities focused on assets, abilities, and abundance. She is the Co-Founder and Co-Director of Social Impact Programs at Moves The Needle where she teaches organizations how to use Lean Innovation to eliminate the waste in how we create social change.

Heather is also the creator of Wish List Hero.org, a website that unites nonprofit needs and the community and publishes the greatest wishes of nonprofits each week in the Arizona Daily Star. She mentors numerous social entrepreneurs each year and is active in creating more powerful entrepreneurial ecosystems. Heather has received numerous awards for her leadership and commitment to the community, including University of Arizona Honors College Young Alumna, TEDx Starr Pass Women Local Leader, Greater Tucson Leadership Ronald L. Kurth Award, 40 Under 40, and Inside Tucson Business Up and Comer.
Nonprofit leaders must be effective collaborators. You may be solving systematic problems that require the coordinated efforts of multiple organizations. You may be working with foundations that want to be involved in creating a new program they'll fund. And you certainly must collaborate with your internal staff and board to come up with innovative ways to achieve your mission.

But are your teams collaborating effectively? Do some meetings drag and others feel contentious? Do you feel unheard or conversely that you are the only one contributing? Are ideas offered stale or too safe? Then come learn some foundational skills of improvisational theater that you can use to:

- Build stronger connections with your team
- Create a safe space where everyone feels comfortable collaborating and
- Generate tons of innovative ideas

In this highly participative session, you'll be on-your-feet practicing new skills, sometimes succeeding, sometimes failing, but always being supported and laughing the whole way through. And you'll take home specific exercises you can use at your next team meeting to foster effective collaboration.

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Brianna Klink is an organizational development and corporate training expert that has helped Fortune 500 companies, startups, and nonprofits boost the growth and performance of their talent. Most notably, she helped Longboard Asset Management double revenue, PetSmart Charities save 40,609 more pets from euthanasia, and Corpedia launch an e-learning product that was acquired by NYSE Euronext. Brianna left “Cubicle Nation” for the life of an entrepreneur. She is also a veteran improver who performs regularly with Mail Order Bride at The Torch Theatre and uses improv skills to help clients develop their teams. Brianna earned degrees in psychology and drama from the University of Washington.
Afternoon Breakout Sessions (1:15pm-2:45pm)

**PM1 – Keys to Engaging Corporate Volunteers**

**MODERATOR:** Chris Helmuth, Vice President, HandsOn Greater Phoenix

**PANELISTS:**  
- Kelsey West, Volunteer Coordinator, State Farm  
- Lindsay Magre, Philanthropy and Social Media Coordinator, Peoples Mortgage  
- Jennifer Martyn, Sr. Community Outreach Representative, SRP  
- Maureen Salloom, Corporate Giving Specialist, APS

Trying to figure out how to better engage corporate volunteers? Do you know what constitutes a “successful” volunteer activity in their eyes? In this session, you will learn about the types and sizes of volunteer opportunities corporate volunteer representatives look for, how you can connect with them, and what information they need from you to determine if any activity or partnership would work. This session will be informative and provide key takeaways to help your organization strengthen its volunteer coordination efforts.

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Chris Helmuth is the Vice President of HandsOn Greater Phoenix where she has worked for the last 19 years advancing the volunteer service movement and specializing in corporate volunteer engagement. Before joining the nonprofit sector, Chris worked for several years for the Indianapolis Police Department in media relations and special events.

Chris has served both locally and nationally in various volunteer capacities. Most recently, she serves as a member of the Points of Light Corporate Activation Affiliate Team and a member of the Points of Light Leadership Faculty. Chris holds a Bachelor’s degree in Journalism and Political Science from Indiana University.
PM2 – Communicating Your Impact through Social Return On Investment

Dr. Anthony Evans
Staff Director and Senior Research Fellow, L. William Seidman Research Institute

As donors and funders become increasingly focused on evaluating their investments based on outcomes, not just inputs and outputs, it is critically important that nonprofits understand how to effectively calculate and communicate the social return on investment (SROI) of their programs. In this interactive and hands-on session, we will take a closer look at what Social Return on Investment (SROI) is, why it is important to communicate, and how to begin formulating your own unique SROI message.

We will start with a short overview of the findings from the recently released 2018 study Beyond the Bottom Line: The Social and Economic Impact of Arizona Nonprofits, as well as take participants through a brief case study of an example of a local Arizona nonprofit measuring their own SROI. Participants will then have the opportunity to break out into groups with other nonprofit leaders from similar cause areas to discuss and answer five key questions that can help identify SROI.

Attendees will be able to receive feedback on their findings from their small group sessions, as well as take away a few tools that will help them get started on developing and communicating their own unique SROI.

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Dr. Anthony Evans is Staff Director and a Senior Researcher at Seidman Research Institute. His research and consulting interests lie in the areas of sport and leisure, energy, nonprofits, and transportation. Dr. Evans was the principal investigator on Arizona Nonprofits: Economic Power, Positive Impact. His nonprofit work also includes a social return on investment study for the Boys and Girls Clubs of Metro Phoenix; an environmental scan and competitor analysis for Catholic Charities Community Services AZ; and a business case for corporate philanthropy study for the Pakis Foundation.

His other recent consultancy includes studies for Super Bowl XLIX, the Arizona Diamondbacks, the 2017 Final Four, Republic Services, Banner Health, Honor Health, and Intel. Prior to joining Seidman, Dr. Evans held a number of senior U.K. and European marketing roles in the private sector, including 18 months as Commercial Manager at Bangor City Football Club in the League of Wales. Dr. Evans can also draw upon significant management experience from the entertainment world, leading and implementing European marketing strategies for such well-known brands as Thomas the Tank Engine, Bob the Builder, and Guinness World Records. Dr. Evans received a B.A. in Philosophy from Kings College London (England), an M.A. in Sociology of Sport from the University of Leicester (England) and a Marketing Ph.D. from the University of Sheffield (England).
PM3 – Nonprofit Advocacy: Tools to Advance Your Strategy

MODERATOR: Brandy Petrone, Senior Associate, Goodman Schwartz Public Affairs  
Yesenia Pinales, Associate, Goodman Schwartz Public Affairs

PANELISTS: Carlos Castaneda, M.P.A., Development Manager, McDowell Sonoran Conservancy  
Pam Gaber, CEO and Founder, Gabriel’s Angels  
Rick Mitchell, Executive Director, Homeless ID Project

This session is for those organizations who already understand that advocacy is an important and necessary tool to fulfill your mission and ensure the sustainability of your programs. You have already begun to do some work in the area, but are desiring and have the need to take your engagement to the next level. There may be a specific bill or issue that you want to take the lead on, or that you foresee needing to support or oppose; or you may desire to get your board and other stakeholders more involved with the process.

The session will cover advocacy, public policy and lobbying tactics to help you achieve your advocacy goals, including things like tracking legislation, the Request to Speak system, testifying, supporting/opposing a bill or ballot proposition and things to consider when drafting a bill and the timing of the legislature. We will conclude with an interactive panel discussion of peers who are putting these activities into action in their own organizations and share their best practices and lessons learned.

Brandy Petrone has been representing and assisting the firm’s private and public-sector clients at the state and local level since 2006 and is a key contributor to the strategic and tactical advice given on legislation, legislative strategy, and work with the Executive and state agencies. Prior to joining Goodman Schwartz Public Affairs, Petrone worked in the nonpartisan Research Staff Department of the Arizona State Senate. Petrone spent most of her time in the Senate as the Analyst for the Commerce and Economic Development Committee and Appropriations and Health Committees. In addition to her analyst duties, Petrone helped to grow the competitive legislative and executive internship program, the program that helped her get her start in public affairs, as the Internship Program Coordinator. Petrone holds a Bachelor of Science degree in Business Administration, with an emphasis in International Marketing, and a Bachelor of Arts degree in Spanish, both from Northern Arizona University.

Yesenia Dhott joined the firm in 2013 and works on legislative issues and helps with the management of the firm’s non-profit association, community outreach clients and professional event management. Prior to joining the firm, she served as a research intern in the Arizona State Senate for the Government and Environment Committee. She graduated from Arizona State University (ASU) in May 2014 with a dual degree in both Political Science and Transborder Studies with an emphasis on U.S. and Mexican Regional Immigration Policy and Economy. Dhott is currently working towards her Master of Public Administration from Arizona State University.
PM4 – Getting to Know Your Donor from “the Inside Out”

Maureen Hannon
Director, Sanford Institute of Philanthropy, Maricopa Community Colleges

Kristin Romaine
Faculty Facilitator, Sanford Institute of Philanthropy, Maricopa Community Colleges

What do your donor files tell you? Do they show a deep understanding of that specific person? Or, are they all about the ‘facts’? Transitioning your current donors and fans into Major or Transformational Gift Givers is more about the Why then just their capacity to give. Discover how to identify major gift prospects, help connect them to their passions, and build targeted strategies for engaging with them to secure the gift. This workshop will help define Major Gifts and dive into the principals of fundraising to come up with a strategy to get to know your donors from “the inside out.”

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Maureen Hannon has been with the Maricopa Community College District for nearly 14 years assisting organizations with their most pressing people and business challenges through training and development solutions. Originally from New York she has been living in AZ for over 16 years and is happy to have left the snow behind. As Director of the Sanford Institute of Philanthropy at Maricopa Community Colleges Maureen helps nonprofit professionals unleash their passion, increase their fundraising capabilities and increase the impact they have in their communities.

Kristin Romaine grows visions with strategic direction and social purpose. She founded her first nonprofit when she was just 22 years of age. Since then, she has been innovating within the nonprofit sector, adapting lean startup methodology to philanthropic purpose. Her fundraising accomplishments include raising over $50 million for local, national and international causes. As CEO & Lead Collaborator for Like the Lettuce Consulting, she has masterminded the social media strategies behind the winning small nonprofits for Arizona Gives Day for 3 years in a row and is the leading organizer for Phoenix Pro Bono Week, the largest in the nation. She has been recognized as one of the PBJ 40 under 40 and is a graduate of Valley Leadership Class 36. Kristin has an MBA in Nonprofit Management from Regis University and is an instructor for the Sanford Philanthropy Institute and the founder of a nonprofit mastermind group Nonprofit Ninjas. Her life mission is to #scatterjoy.
PM5 – Preventing and Resolving Workplace Harassment

Krista Watson

In this session attendees will be given practical tips for preventing harassment and how to respond when harassment complaints are received. Discussions will take place about the newest Respect in the Workplace or Civility Training many organizations, including EEOC, are providing. We will take a look at the role non-supervisors can play by being an active bystander when they see or hear harassment.

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Krista Watson serves as the Program Analyst for the Phoenix District Office of the U.S. Equal Employment Opportunity Commission (EEOC). As the Program Analyst she is responsible for the Phoenix District Office’s Outreach and Education program in Arizona, New Mexico and Utah. Ms. Watson is a frequent speaker throughout the District about employment related matters, EEOC laws, guidance and procedures and she is a featured speaker at many conferences and meetings. In addition to her duties in the Phoenix District, Ms. Watson is a frequent trainer on national training projects. Before serving in this position, Ms. Watson was an Investigator and the Charge Receipt Supervisor. As an Investigator, Ms. Watson investigated individual and class complaints of employment discrimination. Prior to joining the Commission, twenty four years ago, Ms. Watson worked for the Department of Justice. She received her M.A. and B.A. from Western Illinois University.
PM6 – What’s Trending? Using Budgeting and Forecasting to Advance Your Mission

Mario Aniles
Director of Finance and Portfolio Management, Housing Authority of Maricopa County

This session will discuss various ways to analyze the data you currently have, incorporate strategic objectives, and develop a financial plan that leads to a more productive and better informed organization.

- Providing effective financial planning throughout the year by setting targets and establishing priorities
- Creation and use of trend analysis
- Budget preparation and use
- The use of analytics to manage resources efficiently and effectively
- A variety of financial analyses to assist you in improving your organization’s performance

Learning Objectives:
1. Explore best practices for budgeting and forecasting.
2. Discuss the use of trends, analytical analysis, key performance indicators, and other tools to better assess your financial situation and determine financial benchmarks.
3. Learn how to use tools to budget and forecast accurately

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Mario Aniles is a CPA and community leader serving organizations in the areas of economic development, housing, education, mentoring, finance, community development, and the arts. His has extensive experience in the world of finance and has been named as one of Phoenix’s 40 Leaders under 40 for his involvement and achievements in these areas. More recently he has worked with a team to redevelop and properly capitalize housing stock throughout the county in partnership with private and public agencies and has served or serves on the boards of Local First Arizona, Phoenix Center for the Arts, Big Brother Big Sisters, and the Alliance of Arizona Non Profits.