

4<sup>th</sup> ANNUAL  
SOUTHEAST IOWA  
**NON  
PROFIT**  
SUMMIT

**FREE EVENT**  
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**September 20, 2018**  
**Bridge View Center**



**Program**

# 4<sup>th</sup> ANNUAL SOUTHEAST IOWA NONPROFIT SUMMIT

September 20, 2018  
8 a.m. – 4 p.m.

Bridge View Center, Ottumwa, Iowa

We are thrilled to make this event available to Non-profits  
for the fourth year in a row!

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 dedicated 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, TDT CPAs & Advisors, Iowa State University Extension & Outreach, and Wapello County Foundation.*

## Come to Learn.

Enjoy breakout sessions covering top trends, opportunities and challenges facing our sector—like **Leveraging Generational Perspectives, Finding a Work/Life Balance, Cyber Security** and **Hot Topics in HR**. Bring several members of your organization and take advantage of all the learning opportunities provided throughout the day.

## Build Your Network.

Enjoy a fabulous salad and deli lunch buffet, while learning the values that influence your leadership style. This lunch and learn session will also allow time to connect and share with nonprofit peers and other stakeholders from around the southeast Iowa region. Take this opportunity to build relationships, share best practices and leverage existing resources to increase organizational impact.

## Committee Members:

Kelly Genners  
Vice President of Programs & Initiatives  
Ottumwa Regional Legacy Foundation

Courtney De Ronde  
CPA, Partner  
TDT CPAs and Advisors, P.C.

Himar Hernandez  
Assistant Director  
Iowa State University Extension & Outreach

Amy Nossaman  
Grants Program Manager  
Ottumwa Regional Legacy Foundation

Aaron Phillips  
Executive Director  
United Way of Wapello County

Chuck Kiple  
Board member  
Wapello County Foundation

Keynote & Session sponsored by



### Keynote Speaker

Liz Nead  
Speaker, Author, Coach

A speaker, coach and television host, Liz Nead is an expert in *Bringing Life Back to Everyday Life*. Her passion, *Nead Inspiration*, is impacting the lives of thousands with life coaching, magazine articles, public speaking and life improvement television. Liz authored several best selling books. She blogs for *Huffington Post* and *She Knows*. Liz is a skilled story-teller and teacher, most recently traveling to India to explore her origins, climbing Mt. Kilimanjaro and competing in the Iowa Strongman Games. Whether she is climbing a mountain, flipping 300 pound tires, producing an award winning television show, or conducting experiences in her personal life, her audiences learn valuable lessons to build an influential life, focusing primarily on leadership, diversity and emotional intelligence. Liz has a BS in Political Science and an MPA.

She also balances her passion-driven career with a busy family life, raising seven kids in a blended family with her husband, a retired Army Major.

Keynote: 8:45 am - 9:35 am

### The Climb of My Life - Lessons I Learned Summiting Mt. Kilimanjaro

Liz took on the challenge to travel to Tanzania and climb to the roof of Africa in search of adventure and transformation. She returned with a changed vision of leadership. Liz was challenged to put away her super-woman complex and embrace "Pole-Pole" a swahili word that unlocked the power of self-care.

Takeaways:

- How to determine and maintain the pace of excellence
- How to conquer overwhelm and accomplish stretch goals
- Why everyone can win
- Creating a culture of joyous service

Session 3: 1:20 pm - 2:30 pm

### Liz's Five Favorite Technology Secrets: Tapping Into the New Online Business Environment and Leveraging Your Talents and Brand

Today's social media and technology tools are not reserved for teenagers and college students. Business Coach, Liz Nead, shares her top five recommended technology tools. These include live streaming, LinkedIn, blogging, self-publishing and graphic design tools. For the last ten years, Liz used low-cost, high impact technology solutions to reach and develop a global client base from her home office in Des Moines, Iowa.

Sessions sponsored by



Kari McCann Boutell

Speaker:

Kari McCann Boutell, President of the Iowa Council of Foundations

Kari McCann Boutell consults with nonprofits to conduct board governance and strategic planning sessions throughout Iowa. Kari has served as the President of the Iowa Council of Foundations since 2015. Kari started her career in philanthropy in eighth-grade as a youth grantmaker. She earned her B.A. in Nonprofit Management from the University of Northern Iowa (UNI) in 2011 and completed her M.A. in Philanthropic Studies at the Indiana University Lilly Family School of Philanthropy in May 2013. She serves on the UNI Nonprofit Leadership Alliance Advisory Board, Women's Giving Circle grants committee, the UNI Leisure, Youth and Human Services Advisory Council, and the St. Mark Youth Enrichment Board of Directors. Kari is a Jr. Achievement classroom volunteer and teaches spin classes at her local YMCA/YWCA. She and her husband, Jeremy live in Dubuque.

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

## A Winning Combination: Strategies, Structures and Roles for Effective Board Governance

Are you considering joining a board of directors? Are you on a board and unsure what exactly it is you should be doing? Have you just stepped into the board chair role and are unclear about your role? Are you an executive director struggling to find the right board members for your organization? If yes, this session is for you!

Takeaways:

- . About strategies to recruit and retain the right board members
- . How to structure an effective board orientation and board meeting
- . The six key roles and responsibilities of board members
- . How to create win-win-win partnerships for your organization and community
- . Tools and templates to make the session actionable back home at your organization

Session sponsored by



Cassandra Halls

Speaker:

Cassandra Halls, Founder of 2 THE TOP

Areas of specialty include: strategic planning, project management, research services, training facilitation, workforce recruitment and retention, generational perspectives, succession planning and operations process improvements.

Halls spent 10 years of her career in public administration in Iowa, and then shifted to corporate employment, working in multiple strategic roles for a start-up technology company which grew from 20 employees to over 1,000 employees over the course of two short years! She has served in the Vice President role in both non-profit and corporate operations, utilizing her broad perspective to drive solutions to the challenges encountered in many work cultures and environments.

Halls earned a bachelor's degree in Public Administration from William Penn University.

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

## Get Back to the Future!! Leveraging Generational Perspectives to Advance Your Organization

The workforce is experiencing a unique transition. Currently, there are 5 generations represented in the workplace. With all of the varying perspectives, it is easy to get lost in assumptions and perceptions we have of each other and forget the value we all bring to our organizations. Join us for an interactive discussion, processing lessons learned from the past to help launch you into the future, with a bit of magic from 1985!

Takeaways:

- . Learn about generational influence that impact the way we approach our work
- . Understand the reality and value generational diversity brings to work culture
- . Have new strategies to implement to improve generational relationships in your organization

Session sponsored by



Patti Fields

Speaker:  
Patti Fields, Vice President for Community Impact & Engagement,  
United Way

Patti partners and collaborates with local governmental entities, businesses and many nonprofit agencies in the areas of Education, Income and Health. She directs the Community Investment and Disaster Response for United Way of Johnson & Washington Counties and supervises the United Way Volunteer Center.

With over 20 years of experience working with volunteers in nonprofits, Patti is a leader in volunteer management at the local and state level. She has developed continuing education curriculum and presented trainings and workshops in the core competencies and best practices of volunteerism and volunteer management. She is an advisor to the University of Iowa Student United Way, a member of the Volunteer Centers of Iowa and an instructor for the Volunteer Management Certificate Program at Kirkwood Community College. Appointed by Governor Culver in 2008 -2015 to the Iowa Commission on Volunteer Service. Embracing the value of service in her personal life, Patti served on the Iowa City Community School District School Board from 2005 to 2015.

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

## The Changing Face of Volunteerism: The Challenge of Finding the Right Ones and Keeping Them

Recruitment is a critical activity for leaders of volunteers and, of course, finding the right volunteers makes all the difference. This workshop will cover how to make the most of your efforts through the important elements of the volunteer recruitment and retention process, best practices for volunteer placement and how to market your program to volunteers of all ages.

Session sponsored by



Jo Ellen Whitney

Speaker:  
Jo Ellen Whitney, Davis Brown Law Firm

Jo Ellen primarily practices in the areas of employment and health law. As the current chair of the firm's Employment Law and Labor Relations Department, she brings 30 years of practical experience to business planning, discipline, and termination issues for employers. Her work includes various administrative agencies including the EEOC, ICRC, OCR, DOL and OSHA.

In the area of health law, she also focuses on privacy and confidentiality issues; medical staffing, credentialing and privileging; and consent and risk analysis for hospitals, clinics, physician practices, and long-term care.

She frequently provides her clients with on-site training for all levels of employees and is a highly sought after presenter on labor and health law issues. Jo Ellen is AV® Preeminent™ rated by Martindale-Hubbell and has been recognized by Chambers USA, Great Plains Super Lawyers, and The Best Lawyers in America® for her work. Jo Ellen was admitted to the U.S. Supreme Court Bar in March 2018.

Session 2: 11:10 am - 12:20 pm

## What Changes Stays The Same: HR Basics and Hot Topics

This is an interactive session focusing on common HR issues and how such issues are affected by changing workplace expectations, including social media.

Takeaways:

- . Identify key employment law areas critical for any business
- . Assess various policy and practice concerns for individual organizations
- . Create policies that comply with current law

SESSION OPTIONS

SESSION OPTIONS

Sessions

Option 1

Option 2

Option 3

Session 1  
9:40 to 11:00



Kari McCann Boutell

A Winning Combination: Strategies, Structures and Roles for Effective Board Governance



Cassandra Halls

Get Back to the Future! Leveraging Generational Perspectives to Advance Your Organization



Patti Fields

Volunteer Recruitment, Placement and Resources

Break  
11:00 to 11:10

Session 2  
11:10 to 12:20



Jo Ellen Whitney

What Changes Stays the Same: HR Basics and Hot Topics



Angie Kendall

The Life in Work/Life Balance



Regenia Bailey

Help Your Organization Succeed with Succession Planning

Lunch Working Session  
12:30 to 1:15



Cassandra Halls

Lunch Session Topic: What Influences Your Leadership Style?

Session 3  
1:20 to 2:30



Jane Goeken

Grantwriting 101 Session A



Tony Schwarz

Practical Cyber Security for Nonprofits



Liz Nead

Liz's Five Favorite Technology Secrets

Break  
2:30 to 2:40

Session 4  
2:45 to 4:00



Jane Goeken

Grantwriting 101 Session B



Courtney DeRonde

Financials for Non-number Crunchers



Loraine Hardin

How To Get Your Organization Lazer Focused Today

Sessions sponsored by



Angie Kendall

Speaker:

Angie Kendall, Sr. Development Officer at Genesis Health Systems Foundation

Known as the resident innovator Angie loves nothing more than working collaboratively to solve complex problems by connecting people and resources for progress.

Passionate about women and children she has spent her career advocating for safe childhoods and supported families. She is fascinated by research of early trauma, the neurobiological impact of experiencing adversity and the science of making healing connections.

She currently serves as president elect of the Association of Fundraising Professionals of the Quad Cities and on the Board of Directors for Hand-in-Hand, a Quad Cities non-profit that provides fun, inclusive learning experiences for children and young adults of all abilities.

Angie's other passions include her family, the Iowa State Cyclones, elaborate practical jokes and great snacks. Angie strives to work with diligence and heart, never take herself too seriously and to laugh every day.

Session 2: 11:10 am - 12:20 pm

## The Life in Work / Life Balance

Why is work different than life in this worn out equation? We can use the very latest in brain science to understand how trauma and adversity directly impact our levels of stress and productivity. We can also learn how connecting better with each other is the perfect antidote to toxic and inherent stress of the human service industry. Creating a better work life balance becomes building a better life.

Session sponsored by



Regenia Bailey

Speaker:

Regenia D. Bailey, M.A., M.B.A.

Regenia is an organizational strategist, consultant, and coach. For the past fourteen 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.

She has experience in working with over sixty nonprofit, public, and private sector organizations on strategic planning projects. Clients have included very small, volunteer-run organizations to large organizations with multi-million dollar budgets and dozens of internal and external stakeholders involved in the planning process.

Regenia has an MBA from The University of Iowa and additional training from BoardSource, ToP Methods in Facilitation and Strategic Planning, the Strategic Doing Institute, and the National Economic Gardening Institute.

Session 2: 11:10 am - 12:20 pm

## Help Your Organization Succeed with Succession Planning

The single most important competitive advantage that any organization can have is the energy of its people. Competitors can always create services or build products – just like yours. But the organization that truly taps into the wisdom, creativity and initiative of their people has a sustainable competitive advantage.



Jane Goeken

Speaker:

Jane Goeken, Community Development Specialist, Iowa State University Extension and Outreach

Jane Nolan Goeken has been a Community Development Specialist with Iowa State University Extension and Outreach for 16 years. Her office is in Spencer, in northwest Iowa.

Jane has more than 30 years of experience working with federal, state, local and foundation grant programs. In addition to having written scores of successful grant applications, she has served as a grant application reviewer and administrator; and has helped set up grant award and review programs.

Jane has a bachelor's degree in Journalism and a master's degree in Public Administration, both from Iowa State.

Session 3: 1:20 pm - 2:30 pm (A)

Session 4: 2:45 pm - 4:00 pm (B)

## Grant Writing 101

Grant Writing 101 is an entry-level workshop for representatives of nonprofits, local government and schools. Topics covered include:

- 1) Planning a project
- 2) Identifying potential funders
- 3) Parts of a grant application
- 4) Tips for success

Participants are encouraged to bring laptops, iPads or other tablet devices in order to explore various online resources during the program.

Takeaways:

- . Links to numerous grant programs relevant for Iowa community development projects
- . A better understanding of what grant reviewers are looking for when evaluating grant applications
- . Tips to make your grant applications more successful
- . Links to data sources that are helpful when planning a project and writing a funding proposal



Tony Schwarz

Speaker:

Tony Schwarz, MBA, CISSP, CISM Information Security Consultant

Tony has over 20 years' experience in managing information security and information technology risk for financial service organizations involved with insurance, banking, software development, and hosting shared services across the United States.

He is the former Chief Information Security Officer and Bank Security Officer for BofI (Bank of Internet) Federal Bank based in San Diego, CA. Prior to that, Tony was the Director of Risk Management / Information Security Officer for the holding company Affiliates Management Company (AMC) in Des Moines, IA.

Tony is a graduate of Upper Iowa University where he received a Bachelor of Science degree in Business; minor in Marketing, and Master of Business Administration from Drake University.

Session 3: 1:20 pm - 2:30 pm

## Practical Cyber Security for Nonprofits

Is your organization at risk for hackers and cyber bullies? This session will focus on how nonprofits can start evaluating and managing cybersecurity risks in today's environment.

Takeaways:

- . Tips to evaluate the environment's cybersecurity risk
- . Learn why criminals might focus on your organization
- . High Value activities that may reduce risk
- . Knowing if and when to get professional assistance
- . Metrics to track for your board of directors

Session sponsored by



Loraine Hardin

Speaker:

Loraine Hardin, Founder of Hardin & Associates

Loraine Hardin has a passion for developing, leading and coaching teams to drive superior performance in their businesses. Through leading many teams of 5-1200 over the past 30+ years she has identified some common elements of developing and leading high-performing teams. The concepts are easy, the implementation and diligence as a leader to stick with it is the challenge. As the Founder of Hardin & Associates she is dedicated to teaching and coaching leadership teams the key elements for success and how to stick with it.

Through all of the experiences she has become known for executive management, leading cross-functional teams, strong team building, strategic and business development, process improvement, change management and overall excellence in leadership. Hardin holds a degree in Finance from the University of Iowa and in addition to her work, Loraine loves spending time with her kids and grandkids as well as bicycling, yoga, cooking and gardening.

Session 4: 2:45 pm - 4:00 pm

## How To Get Your Organization Lazer Focused Today

Overview of EOS, the Entrepreneurial Operating System. EOS combines timeless business principles with a set of simple, practical, real-world tools to help leaders get what they want from their organization.

Takeaways:

- How you can get everyone in their organization 100% on the same page where they are going and how they plan to get there
- How instilling focus, discipline, and accountability allows everyone to execute on the direction - every day
- How to help their leaders become a more cohesive, functional, healthy team

Session sponsored by



Courtney DeRonde

Speaker:

Courtney De Ronde, CPA, Partner TDT CPAs & Advisors

Courtney is a partner at TDT CPAs and Advisors. She leads the firm's Assurance and Advisory practices from TDT's West Des Moines office and serves on the firm's executive committee. Courtney has 16 years of experience in public accounting and works in the nonprofit sector providing audit, accounting and consulting services to a variety of nonprofit organizations.

She holds a Bachelor of Arts degree in accounting from the University of Northern Iowa and is a Certified Public Accountant in the state of Iowa. As a firm leader and owner and a nonprofit volunteer board member, Courtney shares firsthand knowledge and experience as she presents at various conferences and seminars across the state.

Session 4: 2:45 pm - 4:00 pm

## Financials for Non-Number Crunchers

Accounting is often called the language of business. And for most, it's a foreign language. Relevant and timely information is crucial for supporting decision making and for carrying out fiduciary responsibilities, but interpreting financial information is a challenge.

In this session, we'll focus on the key financial information the organization should be receiving and innovative methods for sharing and analyzing the information, such as dashboard reports and narratives. If you're not in finance – this session is for you!

Come learn what you should be requesting from your finance team. If you are in finance – this session is also for you! Come learn how to better communicate financial information to non-financial people.

Takeaways:

How to understand or communicate the context and relevance of financial information for decision-making purposes.



## Schedule Overview

September 20, 2017 • 8 a.m. – 4 p.m.  
Bridge View Center, Ottumwa, Iowa

**8:00 a.m. to 8:40 a.m.**

**Registration and Check-in**  
(Continental Breakfast available)

**PLEASE BE SEATED BY 8:30 A.M.**

**Wake up with the Indian Hills Community College Cheerleaders!**

**8:45 a.m. to 9:35 a.m.**

**Keynote Speaker**

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

**Session 1\***

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

**Break**

**11:10 a.m. to 12:20 p.m.**

**Session 2\***

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

**Lunch - What Influences Your Leadership Style?**

**1:20 p.m. to 2:30 p.m.**

**Session 3\***

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

**Break**

**2:45 p.m. to 4:00 p.m.**

**Session 4\***

\* See centerfold for session options

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