Duke | CONTINUING STUDIES

Duke Nonprofit Management Intensive Track Program, ID: 0194-059
[Virtual Training – Online – Zoom]
Danville Regional Foundation, Sponsor
Session I, April 12–15, 2021 / Session II, June 7-10, 2021

SUMMARY

Participants from throughout the world enroll in the Duke Nonprofit Management Intensive Track Program. Training is designed to give those working in or with nonprofit organizations the skills and expertise needed to succeed in the sector - whether paid staff, volunteers, philanthropists, board of directors, faith-based communities, or individuals transitioning from the private sector. Intensive Track Program participants may complete the requirement for the Duke Certificate in Nonprofit Management in 8 days.

Danville Regional Foundation sponsors the Nonprofit Management Intensive Track Program. Training is available to nonprofits in Danville – also Pittsylvania County (VA) and Caswell County (NC). For information or to Register, contact Starling McKenzie, Senior Program Officer, Danville Regional Foundation, smckenzie@drfonline.org, 434-483-4273.

Opening Session -- Mon, Apr 12, 2021

- Starling McKenzie, Senior Program Officer, Danville Regional Foundation
- Nancy Love, MPA. Director, Duke University Nonprofit Management Program

SESSION I (Apr 12 – Apr 15, 2021)

Mon, Apr 12, 9am – 4pm

Nonprofit–Board Development/Governance
Jeanne Allen, Ed.S, *Jeanneallennc@yahoo.com*

To be successful, nonprofit organizations require strong leadership from their Board of Directors. The board responsibility is to manage the corporation which includes, but is not limited to, overseeing the senior management's effectiveness, organizational policies and procedures, and the execution of its strategies. Learn the roles and responsibilities of the board, including its paramount duties, and why board accountability requires a fully engaged and active board of directors who manage the organization. Discuss how you may increase board members' commitment to the mission and purpose of your organization, and how boards must fulfill their legal and governance duties. This course addresses the following topics: the board's role and responsibilities, the board and the executive director's relationship, financial and legal responsibilities of the board, and how to recruit and select good board members.

Key Learning Objectives

- Understand the Board's roles and responsibilities.
- Discuss how board accountability, prompted by nonprofits internal and external stakeholders, requires a fully engaged and active board who manages the organization.

Bio: Jeanne Allen's expertise is Strategy, Innovation, and Leadership in the nonprofit sector. As a BoardSource Certified Governance Trainer, she is an expert in board development and governance and leadership. Jeanne also custom designs and facilitates engaging board and staff retreats, both online and in person, for nonprofits of various missions.

Additionally, as an Instructor in the Duke University Nonprofit Management Certificate Program she teaches several courses: Board Development and Governance, Strategic Planning, Succession Planning, Effective Meetings and Leadership in Nonprofits. Previously, Jeanne was Assistant Dean, Multicultural Programs at Westchester Community College, NY as well as internal consultant with Girl Scouts USA in NYC.

Ms. Allen earned an Ed.S. in Instructional Systems Technology, and MS in Adult Education from Indiana University, and a BA from UNC-CH.

Tue, Apr 13, 9am – 4pm

Grant Writing and Compliance
Ruth Peebles, MPA, *rpeebles@theinsgroup.com*

This class focuses on the important elements of a grant proposal including: the cover letter; executive summary; need statement; goals and objectives; methodology; evaluation; and, the budget and future funding. Learn the typical questions funders ask when considering a proposal and the criteria used. Participants will be guided through the grant's management process - from preparation of a grant proposal to the fiscal report preparation. Topics include: monitoring and reporting requirements; fiscal management; and, accountability. Practical tips for ensuring compliance and improving chances of future success will be presented. In addition to proposal writing and compliance, participants will learn strategies to diversify a nonprofit's base through individual a and corporate donor programs.

Key Learning Objectives

- Implement effective processes & practices that lead to successful grant writing.
- Conduct grant research via the Internet, publications, other sources and prioritize prospects.
- Determine the most effective writing strategies and styles for grant applications.
- Evaluate and assess grant proposals after reviewing.
- Critique a well-written proposal.
- Ensure compliance and report on a grant's progress and impact.
- Develop an individual and corporate donor solicitation program.

Bio: Ruth Peebles, MPA, offers over 30 years of hands-on experience in nonprofit management, project management, fundraising and organizational development. The INS Group was founded in 1999 with the mission of helping federal, state, and local government agencies, nonprofits, and faith-based institutions use innovative solutions to build their capacity and sustain their programs and services. Ms. Peebles is an instructor for the Duke University Nonprofit Management Program. She also served as an adjunct instructor for the School of Public and International Affairs Master of Public Administration Program at North Carolina State University. Ms. Peebles currently serves on Wake County Affiliate Board of the North Carolina Community Foundation and Student U Board of Directors. She is a founding member of the Next Generation of African American Philanthropists giving circle.

Wed, Apr 14, 9am – 4pm

Nonprofit - Planning & Evaluation
Matthew Nash, MBA, *mnash@duke.edu*

More than ever, nonprofits are under pressure to measure and report on their impact and to "manage for results" in an era of strained resources. In this class, we will present an introduction to basic principles underlying effective program planning and evaluation. Explore important considerations in designing programs that effectively address clearly defined problems. Discuss how to identify and refine a programmatic "theory of change" that traces the causal logic that connects the program's activities to desired outcomes. Finally, we will identify fundamental considerations of planning and conducting major types of program evaluation.

Key Learning Objectives

- Explain the significance of performance measurement for effective program management, evaluation, and reporting.
- Define the core problem that a program seeks to address, along with its root causes, complicating factors, and negative effects.
- Develop or refine a theory of change for designing programs and measuring performance.
- List key steps in planning.

Bio: Matthew T.A. Nash, MBA, is the managing director for social entrepreneurship for the Duke Innovation and Entrepreneurship Initiative. He also directs the Social Entrepreneurship Accelerator at Duke (SEAD), a USAID development lab for scaling innovations in global health. Matt has extensive domestic and international social and public sector experience in social entrepreneurship and social enterprise, strategic planning, organization development, performance measurement, board development and governance, business process transformation, and leadership development.

Thur, Apr 15, 9am – 4pm

Social Enterprise as a Strategy for Nonprofits
Jeff Stern, MBA, *jeffrey, m.stern@gmail.com*

Social enterprise, roughly defined as using business methods in pursuit of social impact, has grown tremendously over the past two decades. We will focus on how nonprofits are using social enterprise as a way to increase unrestricted funds, and on operational effectiveness and efficiency. The class will start with an overview of the various forms of social entrepreneurship, and move to the specifics of how this plays out for nonprofits, including some of the benefits and pitfalls of moving into social enterprise.

Key Learning Objectives

- Understand the various forms of social enterprise and related financing options.
- Understand potential benefits and pitfalls of adopting social enterprise within a nonprofit structure.

Bio: Jeff Stern, MBA**,** has worked in the social sector for over 25 years, as a volunteer, staff member, executive director and board member. He earned his MBA from Duke's Fuqua School of Business in 2003, where he focused his studies on social enterprise, strategy, and marketing. Jeff is currently Director of Business Operations for TROSA, an innovative, multi-year residential program that enables people with substance use disorders to be productive, recovering individuals by providing comprehensive treatment, experiential vocational training, education, and continuing care. Prior to TROSA, Jeff worked at the numerous nonprofits in the field of informal education, including Durham Public Schools and the Museum of Life and Science. His prior Board service experience reflects his interests in the arts, social justice and community development.
General Program Information

SESSION II (Jun 7 – Jun 10, 2021)

Mon, Jun 7, 9am – 4pm

Sustainable Strategic Planning for Nonprofits
Willson, Anne, M.A., anne@annewillson.com

Participants will explore the strategic planning process as an important tool for a nonprofit organization. The focus is on basic components of a strategic plan and the planning process, as well as comparing a variety of business practice tools for an organizational assessment. Tools include the SWOT Analysis, Sustainability Matrix, and the Strategy Canvas as well as others. This course will provide an opportunity for students to apply various tools and examine current practices in strategic planning.

Key Learning Objectives

- Explore the components of a strategic plan process.
- Apply various analysis tools.
- Analyze sample plans from nonprofits.

Bio: Anne Willson works with nonprofits to strengthen the core structures of the organizations and increase their social impact. With a grounded, real-world perspective gained through twenty-seven years in the nonprofit sector, she assists organizations in addressing several fundamental issues necessary for compelling community engagement: sustainable strategic planning built from foundational pillars, solidifying organizational integrity, and identifying and leveraging organizational assets to broaden engagement and increase both philanthropic and earned revenue streams. Anne holds two B.A.'s, an M.A. in Liberal Arts and a Duke Certificate in Nonprofit Management.

Tue, Jun 8, 9am – 4pm

Employment Law for Nonprofits

Warner, Larry, JD, MBA, larry@warnrlawoffices.net

Nonprofits have an obligation to follow federal and state employment and labor laws. This course provides a practical overview of the main employment law issues that arise in nonprofit organizations. Learn about state and federal laws that govern employment policies and practices, as well as recommended guidelines for minimizing risk.

Key Learning Objectives

- Understand state and federal employment laws that apply to nonprofits.
- Learn best practices for hiring employees and working with volunteers.
- Understand the rights and obligations within the employers-employees relationships.

Bio: **Larry Warner, JD, MBA**, is the founder of Warner Law Offices, PLLC, specializes in advising small and medium businesses, with a focus on health care providers, on a variety of legal topics. Over his 25 years practicing law, Larry has worked with clients on employment matters, employee handbooks, corporate governance, licensing approvals, corporate formations, business transactions and contractual agreements. Larry holds an MBA from George Washington University and a JD from Catholic University.

Wed, Jun 9, 9am – 4pm

Nonprofit-Financial Management

Melissa M. LeRoy, melissaleroy@gmail.com

This course provides an understanding of financial management for nonprofits and focuses on topics integral to nonprofit fiscal management. Learn finance terms as they relate to the effective operation of a nonprofit organization. Discuss how to track income and expenses to specific programs to fulfill expectations of funders, donors and the IRS. The role of the board, staff, and committees are covered. Become familiar with the standards of excellence for nonprofit organizations and gain an understanding of financial statements, budgeting, and surviving an audit.

Key Learning Objectives

- Understand how to read and interpret financial reports and records.
- Gain knowledge on how to obtain the complete bottom line on programs.
- Use tools and skills to give foundations the results they ask for.
- Understand the year-end audit and 990.

Bio**: Melissa Metcalf LeRoy** graduated Magna Cum Laude with a degree in Entrepreneurship with minor in Business Law from Western Carolina University. She also earned a Duke Certificate in Nonprofit Management and a Duke Advanced Certificate in Nonprofit Leadership. She teaches non-profit management classes throughout North Carolina, South Carolina & Virginia. Melissa is a past board member of the NC Center for Non-Profits, and is designated as a nonprofit mentor for the western region of NC. She also contributed a TEDx talk, A Love Affair: The Art of Not Asking! and offers her services as a consultant through her firm, On Fire Non-Profit Consulting.

Thurs, Jun 10, 9am – 4pm

Nonprofit – Human Resource Development
Robert Kenney, Ph.D., *ptt@lynchburg.net*

The ability to help people experience success at work creates benefits for employees, volunteers, leadership teams, organizations, and those an organization serves. This class addresses skills that could be used at an individual level, and to better help staff with problems that may affect their job performance and satisfaction. Learn how to strategically respond to issues related to employee communication, motivation, delegation, and coaching; to actively listen to and give constructive feedback to employees, volunteers, and clients; how common myths about employee motivation can make you a better motivator to your staff; how to use their individual differences to help your employees stay fully motivated; apply an effective step-by-step process for successful and mutually beneficial delegation with shared, defined expectations; and, how to prepare for and conduct a coaching session that could fully involve the staff member to understand and map a strategy for performance improvement

Key Learning Objectives

- Provide staff with constructive feedback.
- Actively listen to another's message, to more fully understand its meaning.
- Clear up common myths about how to motivate people.
- Align people's motivators with their individual needs.
- Apply an effective step-by-step process for successful & mutually beneficial delegation.
- Assess possible coaching situations to decide if coaching is worth the time and effort.
- Conduct a coaching session.

Bio: Bob Kenney, Ph.D. is President and Founder of Partners Through Training, based in Richmond, Virginia since 1993 and has taught hundreds of classes as part of Duke University's Nonprofit Management Certificate since 1995. As a trainer and business consultant since 1993, Bob has worked nationally and internationally with thousands of people looking to develop practical business skills in the areas of leadership, management, and team development; managing and working within a remote team; influence and motivation skills; meeting management and facilitation; creative problem solving and innovation; mentoring, strategic partnerships, and interpersonal collaboration. Bob has designed and delivered professional development workshops for a variety of clients in the US, including nonprofit organizations; pharmaceutical and health care organizations; manufacturing plants; educational facilities; commercial airlines and other service-based corporations; and local, state, and federal government agencies. Bob has partnered with 19 centers for continuing and executive education at major universities, such as Duke University, the Universities of North Carolina, Virginia, Pittsburgh, Richmond, Maine, and Southern Maine. Bob holds Masters and Doctorate degrees in social and organizational psychology, with a specialization in small group training and organizational analysis, from the State University of New York at Buffalo.

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GENERAL INFORMATION

Registration

Up to 20 students are accepted into the Nonprofit Management Intensive Track Program. The Program is offered Virtual–Online-Zoom. Registration is open to nonprofit organizations in Danville, Pittsylvania County, Virginia, and Caswell County, North Carolina.

To register for the 2021Nonprofit Management Intensive Track Program, contact:

- Starling McKenzie, Senior Program Officer, *smckenzie@drfonline.org*
  Danville Regional Foundation, 434-483-4273

Class Location: Virtual Training

Attendance Policy**:** Classes meet from 9am to 4pm each day, starting promptly at 9am and ending at 4pm. Twenty (20) students are accepted into the 2021 Nonprofit Management Intensive Track Program sponsored by Danville Regional Foundation. Students who complete the 8 days of this Intensive Track Program are eligible for their Certificate in Nonprofit Management to be mailed. Students are to attend each class as scheduled.

Pre-Reading: The Intensive Track Program requires Pre-reading. Assignments are sent to students 30 days before the class starts.

Program Format: The Intensive Track Program includes lectures, demonstrations, practical work, and hands-on project work. Classes are well organized with exercises to help enforce the lecture materials.

Inclement Weather: In the event of severe weather, we may cancel a class 24 hours in advance of the start time. For updated information on cancellation, call Starling McKenzie at 434-483-4273, Danville Regional Foundation. You may also email Nancy Love at Duke, nancy.love@duke.edu.

Staff: Duke Nonprofit Management Program

- Nancy Love, MPA, Director, *nancy.love@duke.edu*
- Mary Sherk, Program Coordinator, *mary.sherk@duke.edu*
- Ivy Burch, Program Assistant, *ilb4@duke.edu*