Duke | CONTINUING STUDIES

Duke Nonprofit Management Program
Danville Regional Foundation, Sponsor
Nonprofit Management Intensive Track – ID: 0194-042
April 1-4 & June 3-6, 2019

SUMMARY

Participants from throughout the world enroll in the Duke University Nonprofit Management Intensive Track Program. The program is designed to give those working in or with nonprofits 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. Participants may complete the requirement for the Duke Certificate in Nonprofit Management in 8 days.

Danville Regional Foundation sponsors the Duke 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: Monday, April 1, 2019, 9:00 am

- Welcome: Starling McKenzie, Senior Program Officer, Danville Regional Foundation and Nancy Love, Director, Duke University Nonprofit Management Program, Introductions.

SESSION I (April 1-4)

Monday, April 1, 9am – 4pm

Nonprofit–Board Development/Governance
Jeanne Allen, E.Ds, *Jeanneallennc@yahoo.com*

In order 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.

Learning Objectives:

1. Understand the board's roles and responsibilities
2. Discuss how board accountability prompted by a nonprofit's internal and external stakeholders requires a fully engaged and active board who manages the organization

Bio: Bio: Jeanne Allen, Ed.S, has 30+ years of nonprofit sector experience. This includes her current business, Jeanne Allen Consulting, providing training and facilitation to nonprofits on Board Development and Strategic Planning, Instructor in the Duke University Nonprofit Management Program; Management Consultant at Girl Scouts USA National HQ in NYC; and Assistant Dean, Multicultural Programs, Westchester Community College (NY). Ms. Allen earned an Ed.S. in Instructional Systems Technology and MS in Adult Education from Indiana University. Additionally, she holds the highly regarded Board Source Certified Governance Trainer (CGT).

Tuesday, April 2, 9am – 4pm

Evaluating 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 talk about on how nonprofits are using social enterprise - it can be a way to increase unrestricted funds or to focus on operational effectiveness and efficiency. We will start with a social entrepreneurship, and then move to the specifics of how this plays out for nonprofits, including some of the benefits and pitfalls of moving into social enterprise. There will be some time to consider these concepts in your organization (or a classmate's).

Learning Objectives:
1. Understand the various forms of social enterprise
2. Understand the potential benefits and pitfalls of adopting social enterprise within a nonprofit structure
3. See a real-life example of a social enterprise strategy through an exploratory field trip to a local nonprofit organization that has social enterprise at its core

Bio: Jeff Stern, MBA, has worked in the social sector for over 20 years, as a volunteer, staff member, executive director and board member. Mr. Stern earned an MBA from Duke's Fuqua School of Business in 2003. He is the Director of Business Operations for TROSA, an innovative, multi-year residential program. TROSA enables substance abusers to be productive recovering individuals by providing comprehensive treatment, work-based vocational training, education, and continuing care. Prior to TROSA, Jeff worked at numerous nonprofits in the field of informal education, including Durham Public Schools, and the Museum of Life and Science. Mr. Stern's prior Board service experience reflects his interests in the arts, social justice, and community development.

Wednesday, April 3, 9am – 4pm

Nonprofit-Financial Management
Stratton, Ann Vandervliet, *tavandervliet@hotmail.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.

Learning Objectives:

1. Understand financial management.
2. Attain the complete bottom line on programs.
3. Use tools and skills to give foundations the results they ask for.
4. Understand how to read and interpret financial reports.

Bio: Ann Vandervliet Stratton serves as the Executive Director of Smart Beginnings Danville Pittsylvania, a regional school readiness coalition in southern Virginia. She strategically directed public and private investments of $7.5 million dollars since 2011. This resulted in a 50% improvement in the state's pre-literacy assessment in Danville.

Ms. Stratton holds a B.A. in International Studies from USC, and a Duke Certificate in Nonprofit Management. She has 20 years of experience in nonprofit management with a strong background in systems development. Ann has served in a variety of leadership roles and works closely with local, state, and federal funders. She chaired the Danville Public Schools Foundation Board, served on Virginia's Early Childhood Council, and the Danville Pittsylvania Community Policy Management Board.

Thursday, April 4, 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.

Learning Objectives:

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

Bio: Matthew T.A. Nash, MBA, is the managing director for social entrepreneurship for the Duke Innovation and Entrepreneurship Initiative. He is also an adjunct professor of the practice at Duke's Sanford School of Public Policy, where he teaches undergraduate courses on social innovation and human-centered design. He is a senior fellow with the Duke Center for

International Development, and past executive director of the Center for the Advancement of Social Entrepreneurship, where he co-founded the Social Entrepreneurship Accelerator at Duke. Matt has extensive domestic and international social and public sector experience in social innovation, social enterprise, strategic planning, organization development, performance measurement, board development and governance, business process transformation, and leadership development.

SESSION II (June 3-6)

Monday, June 3, 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.

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

Bio: Robert Kenney, Ph.D. has taught in Duke Nonprofit Management Program since 1995. Bob has a doctorate in Organizational Psychology, and has designed delivered management, leadership, and team development workshops since 1993. He works with nonprofit organizations, hospitals and pharmaceutical companies, manufacturing and biotechnology businesses, service-based organizations along with colleges and universities, local and state governments, as well as federal government agencies. Bob works with clients from across the United States and internationally.

Tuesday, June 4, 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 grants 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 and corporate donor programs.

Learning Objectives:

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

Bio: Ruth Peebles, President of The INS Group 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 and 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.

Wednesday, June 5, 9am – 4pm

Employment Law for Nonprofits
Larry Warner, JD, MBA, *larry@warnerlawoffices.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.

Learning Objectives:
1. Understand state and federal employment laws that apply to nonprofits.
2. Learn best practices for hiring employees and working with volunteers.
3. 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.

Thursday, June 6, 9am – 4pm

Sustainable Strategic Planning for Nonprofits

Anne Willson, MA, *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.

Learning Objectives:
1. Explore the components of a strategic plan process
2. Apply various analysis tools
3. 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.

General Program Information
2019 Duke Nonprofit Management Intensive Track Program
April 1-4 & June 3-6, 2019

Registration

Up to 15 students are accepted into the Nonprofit Management Intensive Track Program. Registration is open to nonprofit organizations in Danville, Pittsylvania County, Virginia, and Caswell County, North Carolina. To register for the 2019 Duke Nonprofit Management Intensive Track Program, contact:

- Starling McKenzie, Senior Program Officer, *smckenzie@drfonline.org*, 434-483-4273, Danville Regional Foundation, 434-483-4273
- Class location: Institute for Advanced Learning and Research, Danville, VA

Attendance Policy

Classes meet from 9am to 4pm each day, starting promptly at 9am and ending at 4pm. Fifteen (15) students are accepted into each Nonprofit Management Intensive Track held in Danville, VA. The program is sponsored by the Danville Regional Foundation, Danville. To receive the Duke Certificate in Nonprofit Management on the last day of the Program, students are to attend each class as scheduled.

Staff: Duke Nonprofit Management Program

Mary Sherk, Program Coordinator, 919-681-1025, *mary.sherk@duke.edu*, Ivy Burch, Program Assistant, 919-668-6742, *ilb4@duke.edu*, Nancy Love, MPA, Director, 919-668-6743, nancy.love@duke.edu

Pre-Reading Assignments

The Intensive Track Program may require pre-reading. Assignments are sent to students one month before the class starts.

Program Format

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

Inclement Weather

In the event of severe weather, we will make a decision to cancel a class 24 hours in advance of the start time. For updated information on cancellations, call Starling McKenzie at 434-483-4273 at the Danville Regional Foundation.

Dress Code

Business casual - Bring a sweater and/or jacket to class in case the room temperature changes.