



## Leadership Institute 2018-2019

---

The Nonprofit Leadership Initiative (NPLI) develops effective nonprofit organizations in the Fox Valley Region through leadership, collaboration, and learning opportunities.

**The Leadership Institute** is one of the NPLI programs. It is a local, interactive, professional development certificate program for relatively new executive directors, or nonprofit staff interested in pursuing an executive director level position.

The program consists of nine modules, each focused on a specific topic important to the work of an executive director. Expert faculty with experience in the nonprofit sector will teach the modules.

A Fox Valley Technical College adjunct professor will act as the Leadership Institute coordinator and attend each session to help weave content between subject matter and guide participants in their learning process.

Each date listed below is scheduled from 8 am to noon at the Fox Valley Technical College, unless otherwise noted.

### **May 17 – 18, 2018      Getting Started**

---

#### **Orientation & Personal Leadership**

Hone and grow your leadership skills. Leadership profiles will be completed as part of a pre-module assignment. The profile will be assessed on day one with the instructor and small group activities. This module will focus on effective approaches to leading a team of people to accomplish shared goals, and discover creative ways to achieve positive outcomes.

Bridget Wenman, TEC 55 Chair and President, Perspectives Training & Consulting in collaboration with Nancy Heykes, JD, Leadership Institute Coordinator, will lead this module to help participants grow the following competencies:

- building high-trust relationships
- managing conflict effectively
- understanding leadership principles and how to apply them
- using tools to evaluate risk and opportunities
- developing a process for leading change
- leading employees and volunteers



## Leadership Institute 2018-2019

---

### June 14– 15, 2018      **Aligning Leadership**

---

#### **Board & Organizational Leadership**

Explore reasons why boards exist, and examine the roles, responsibilities and relationship to staff. Gain tools for enhancing board effectiveness including recruitment and development, board engagement, board structure, meeting management, and board self-assessment.

Mary Stelletto, Principal, Vista Global Coaching & Consulting, will lead this module covering:

- 10 responsibilities of a board and 10 responsibilities of a non-profit CEO
- how to lead the board through self-assessment and prioritize needs
- negotiating your role as CEO with your board based on the life cycle of the organization
- best practices and tools for effective recruitment and retention of board members
- how to effectively connect the board to the mission

### July 12-13, 2018      **It's Not About The Money, Except When It Is**

---

#### **Finances & Financial Management**

Analyze the principles of financial management for nonprofits. Learn to apply the fundamentals of accounting, cash flow analysis, expenditure control, and audits. Study budgeting and planning, tax issues, and internal/external reporting requirements for solid fiscal management.

Steve Zimmerman, Principal, Spectrum Nonprofit Services, will lead this module covering:

- revenue-based budgeting
- identifying financial vulnerabilities in your organization
- how to assess the short and long-term financial health of the organization
- using the budget as a tool to make data driven decisions
- visual mapping of programs to support decisions on growth and sustainability

### September 20-21, 2018      **Resourcing the Mission**

---

#### **Development/Fundraising**

Learn the basic types of revenue available to nonprofits, and how to connect fundraising to your organization's mission. Zero in on principles of ethical fundraising, learn to manage the philanthropic process, and develop plans that will enhance the effectiveness of staff and volunteers.

Courtney Weiland, CFRE, Vice-President, Philanthropy, ThedaCare Family of Foundations, will lead this module covering:

- the structure of an effective development team, whatever the size of your organization
- how to set fundraising goals and accountability practices



## Leadership Institute 2018-2019

---

- creating the annual development plan and enlisting support
- how to develop a compelling case for support to engage volunteers, staff and donors

### **October 18-19, 2018                      How & Why Do You Do What You Do**

---

#### **Process Improvement/Accountability for Mission**

Design programs that achieve your organization's mission, account for community and environmental needs, and have potential for economic support. Develop plans based on process thinking. Be proactive in identifying, analyzing and improving upon existing business processes within your organization to optimize your impact.

Lynn Coriano, POINT Project Director, and Jason Schulist, Appvion, Vice President, Continuous Improvement, will lead this module covering:

- articulating your organization's theory of change for perspective on the effectiveness of current programs
- hands-on practice with the four steps of the KATA Process Improvement approach
- capability models for operationally excellent organization
- how to use value streams of humanity models for systemic thinking in nonprofits
- capacity building in program design and evaluation

### **November 15-16, 2018                      People Stewardship**

---

#### **Human Resources**

Discuss critical human resource management issues for both employees and volunteers. Increase your awareness of best practices in performance management systems, personnel policies, and job designs.

Maria Veronico, President, Veronico Human Resources Consulting, will lead this module covering:

- relevant aspects of human resources law
- talent acquisition steps and processes
- effective performance management systems (objective setting, coaching, disciplinary procedures)
- how to access to up-to-date information on employee compensation and benefits,
- potential employee 'total rewards' packages for retention and recruitment for small to medium sized nonprofits



## Leadership Institute 2018-2019

---

**January 24-25, 2019**

**Telling Your Story**

---

### **Marketing/Communications**

Explore a systematic framework for developing a comprehensive marketing and communication plan, whatever the size of your organization. Identify the most effective approaches to communication with your donors, volunteers, and the community.

Our trainer is yet to be determined. They will guide the participants through the following:

- brand identification to understand how to best promote your organization's mission
- creating compelling messages with clear calls to action for target audiences
- identifying best modes of communication for maximum results for fundraising
- roles and responsibilities for communication based on best practices

### **January 24, 2019 PM Project Simulation**

---

Small group project work will take place as participants present an issue they have identified in their own organization that they would like to review and improve. The simulation involves the participant presenting to classmates as a mock presentation to their board. Lunch will be served.

**March 14-15, 2019**

**Doing What's Required And Doing What's Right**

---

### **Ethical/Legal Issues**

Explore key moral issues of, and managerial approaches to, promoting ethical conduct in the organization. Learn how to promote proper conduct, how to manage ethically and how to handle potential problems in enforcing standards. Learn how to build a culture that prevents ethical and compliance problems.

Nancy Heykes, JD, Leadership Institute Coordinator, will lead this module covering:

- identifying situations in the organization vulnerable to ethical challenges,
- defining processes to resolve ethical issues related to stakeholders (clients, employees, volunteers, donors, board, community),
- tools to build a culture to prevent ethical and compliance problems and much more!



## Leadership Institute 2018-2019

---

### **April 25-26, 2019      Where Have You Been & Where Are You Going**

---

#### **Wrap Up: Day 1**

The Leadership Institute program is designed to increase nonprofit leaders' effectiveness and skills in understanding and managing today's nonprofit organizations.

In this last session, Bridget Wenman, TEC 55 Chair and President, Perspectives Training & Consulting in collaboration with Nancy Heykes, JD, Leadership Institute Coordinator, will help participants review the principles and practices of running an organization that measures success through service. Participants will review their personal leadership strengths and weaknesses and develop ways in which they will adapt to build a strong foundation for leadership based on what was learned in the Institute.

#### **Graduation: Day 2**

A short presentation will be required to reflect on an area of improvement or growth gained through the Institute modules. The Leadership Institute Coordinator will work with participants to develop the topics.

A graduation ceremony will take place on the last day with an invitation to all board chairs and program funders.